

Demand analysis of South Africa as competitive tourist destination

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DECLARATION WITH REGARD TO INDEPENDENT WORK

I, Daniëlle Cronjé, identity number 9406230095085 and student number 24160776 do hereby declare that this research submitted to the North-West University, for the MA study: Demand analysis of South Africa as competitive tourist destination, is my own independent work; and complies with the Code of Academic Integrity, as well as other relevant policies, procedures, rules and regulations of the North-West University; and has not been submitted before to any institution by myself or any other person in fulfilment (or partial fulfilment) of the requirements for the attainment of any qualification.

A handwritten signature in black ink, appearing to read 'Daniëlle Cronjé', written in a cursive style.

Daniëlle Cronjé

Date: 22 November 2018

PREFACE

And acknowledgements

It would have been impossible for me to complete my Masters without the support and guidance of the following people:

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DEMAND ANALYSIS OF SOUTH AFRICA AS COMPETITIVE TOURIST DESTINATION

ABSTRACT

The main aim of this study was to analyse tourism competitiveness and conduct a demand analysis of South Africa as a tourist destination. To achieve this aim, four objectives were set: firstly, to conduct a literature overview to analyse competitiveness, definitions and models and aspects of competitiveness of South African tourism; secondly, to conduct a literature review and analysis based on previous research studies done on the competitiveness of destinations within the tourism industry; thirdly, to investigate the competitiveness of South Africa as a tourist destination from a demand point of view using quantitative research; and lastly, to draw conclusions and make recommendations concerning the tourism competitiveness of South Africa as a tourist destination.

By means of the literature overview, it was established that not all researchers agree on what the concept *competitiveness* truly means. However, certain researchers agree that competitiveness refers to the competition among destinations or places. The significant findings of the literature overview are that no single definition or model is currently utilised within literature that is fully expressive of the meaning of the term competitiveness. A comprehensive literature review and analysis was conducted which focussed on obtainable (published) articles that dealt with tourism- or destination competitiveness. This review showed that most of the articles published on tourism or destination competitiveness focussed on Europe and that only eleven out of one hundred and twenty-one (121) articles in the sample focussed on South Africa specifically. The major finding is that a gap exists in tourism competitiveness research regarding the approach being used to investigate the tourism aspects of competitiveness. This is due to the majority of the articles having researched tourism competitiveness aspects/factors from a supply side. The empirical study comprised an investigation of the competitiveness of South Africa as a tourist destination from a demand point of view using quantitative research and capturing descriptive and exploratory data. Descriptive results were used to profile the respondents, determine the competitiveness aspects and to conduct a temporal analysis of these competitiveness aspects and strengths and weaknesses of South Africa. Exploratory factor analysis was used to identify the factors contributing to tourism competitiveness. The results showed that five (5) factors were identified contributing to tourism competitiveness from a demand side, namely: Tourism services, Risk and quality, Unique tourism attributes, Locality and Entertainment and amenities. Recommendations are: Employers could send their employees for training to ensure that they know how to treat the guests. This training includes improving the services at the hotel, guesthouse, restaurant or attractions in order to ensure hospitality from the employees' side; Safety of South Africa should be promoted more vividly, seeing that the majority of the respondents indicated safety to be a weakness, as well as that it is extremely important for the competitiveness of a destination. This could be done by including "safety tips" before or while the travel agents sell the packages.

The research conducted in this study not only provided information about the competitiveness factors of South Africa as a tourism destination from a demand point of view, but also provided findings of other competitiveness aspects or factors of other destinations. If one has knowledge of the competitiveness factors of a destination, it could lead to growth in tourist numbers.

Keywords: *Tourism; destination competitiveness; tourism competitiveness; demands; South Africa*

OPSOMMING

Die hoofdoel van hierdie studie was om toerisme-mededingendheid te analiseer en 'n aanvraag-analise rakende Suid-Afrika as 'n toeristebestemming uit te voer. Om hierdie doel te bereik is vier doelwitte gestel: eerstens om 'n literatuur-analise te doen om mededingendheid, definisies, modelle en aspekte van mededingendheid van Suid-Afrikaanse toerisme te analiseer; tweedens, om 'n literatuur oorsig analise te gee wat gebaseer is op vorige navorsingstudies wat gedoen is oor die mededingendheid van bestemmings binne die toerismebedryf; derdens, om ondersoek in te stel na die mededingendheid van Suid-Afrika as 'n toeristebestemming vanuit 'n aanvraag-gesigspunt deur die kwantitatiewe navorsingsbenadering te volg; en laastens, om gevolgtrekkings en aanbevelings te maak met betrekking tot die toerisme-mededingendheid van Suid-Afrika as 'n toeristebestemming.

Aan die hand van die literatuur-analise is vasgestel dat nie alle navorsers saamstem oor wat die konsep *mededingendheid* werklik beteken nie. Sekere navorsers stem saam dat mededingendheid verwys na die mededinging van bestemmings of plekke met mekaar. Die betekenisvolle bevinding uit die literatuur-analise is dat geen losstaande definisie of model tans in die literatuur aangewend word wat ten volle uitdrukking gee aan die betekenis van die term *toerisme-mededingendheid* nie. 'n Omvattende literatuuroorsig analise is uitgevoer wat gefokus het op bekombare, gepubliseerde artikels wat handel het oor toerisme- of bestemmings-mededingendheid. Hierdie oorsig analise het getoon dat die meeste artikels wat oor toerisme- of bestemmings-mededingendheid gepubliseer is, op Europa gefokus was en dat slegs elf uit eenhonderd een-en-twintig (121) artikels uit die steekproef op Suid-Afrika spesifiek gekonsentreer het. Die hoofbevinding is dat 'n hiaat in navorsing oor toerisme-mededingendheid bestaan en wel ten opsigte van die benadering wat gevolg word om die toerisme-aspekte van mededingendheid te ondersoek. Dit word toegeskryf aan die feit dat die meerderheid artikels wat oor toerisme-mededingendheid handel, uitgevoer is vanuit 'n aanbod-perspektief. Die huidige empiriese studie is saamgestel uit 'n ondersoek na die mededingendheid van Suid-Afrika as 'n toeristebestemming vanuit 'n aanvraag-perspektief deur die kwantitatiewe navorsingsmetode te volg en beskrywende en verkennende data in te samel. Beskrywende resultate is gebruik om die respondente te profileer, mededingendheid aspekte te bepaal en 'n temporale analise van die mededingendheids-aspekte en sterkpunte en swakpunte van Suid-Afrika uit te voer. Verkennende faktoranalise is gebruik om die faktore wat tot toerisme-mededingendheid bydra, te identifiseer.

Die resultate het getoon dat vyf (5) faktore geïdentifiseer is wat tot toerisme-mededingendheid vanuit 'n aanvraag-gesigspunt bydra, naamlik: Toerisme-dienste, Risiko en kwaliteit, Unieke toerisme-eienskappe, Ligging en Vermaak en aantreklikhede. Aanbevelings is: Werkgewers kan hul werknemers vir opleiding stuur om te verseker dat hulle weet hoe om die gaste te behandel. Hierdie opleiding sluit in die verbetering van dienste by die hotel, gastehuis, restaurant of attraksies om gasvryheid van die kant van die werknemers te verseker. Die veiligheid van Suid-Afrika behoort meer intens bevorder te word, aangesien die meerderheid respondente veiligheid aangedui het as 'n swakpunt, asook dat veiligheid van die uiterste belang is vir die mededingendheid van 'n bestemming. Dit kan gedoen word deur "veiligheidswenke" by pakkette in te sluit voordat of terwyl dit deur die reisagente verkoop word.

Navorsing het nie aallenlik inligting oor die medingheidsfaktore van Suid-Afrika as toerisme bestemming verskaf nie, maar het ook bevindinge verskaf oor ander mededingingheids aspekte of faktore van ander bestemmings. Deur om kennis te dra van die mededinginheidsfaktore van 'n bestemming, kan dit lei tot 'n groei in toeriste getalle.

Sleutelterme: *Toerisme; mededingendheid, aanvraag; Suid-Afrika*

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TABLE OF CONTENTS

CHAPTER 1: INTRODUCTION AND PROBLEM STATEMENT	1
1.1 Introduction.....	1
1.2. Background to the study.....	2
1.3 Problem statement.....	6
1.4 Goal of the study.....	7
1.4.1 Goal.....	7
1.4.2 Objectives.....	7
1.5 Research methodology	7
1.5.1 Literature Study.....	8
1.5.2 Empirical survey.....	8
1.5.2.1 Research design and method of collecting data.....	8
1.5.2.2 Development of a questionnaire.....	9
1.5.2.3 Sample	10
1.5.2.4 Data analysis	10
1.5.2.4.1 Descriptive analysis	10
1.5.2.4.2 Exploratory analysis.....	11
1.5.3 Ethical clearance.....	11
1.6 Defining key concepts.....	12
1.6.1 Comparative advantage.....	12
1.6.2 Competitiveness	12
1.6.3 Destination competitiveness	12
1.6.4 Literature review	12
1.6.5 Tourism.....	12
1.6.6 Demand analysis	13
1.6.7 Tourist destination.....	13
1.7 Chapter classification.....	13
CHAPTER 2: UNDERSTANDING TOURISM DESTINATION COMPETITIVENESS	14
2.1 Introduction.....	14
2.2 The analysis of the tourism industry.....	14

2.3	Analysing the concept Competitiveness.....	17
2.3.1	Definitions of competitiveness.....	17
2.3.2	Comparison between competitiveness and comparative advantage	22
2.3.3	Models of competitiveness	25
2.3.3.1	Porter’s 5-forces model.....	27
2.3.3.2	The Porter diamond, or the determinants of competitive advantage.....	28
2.3.3.3	Poon’s destination competitiveness model.....	28
2.3.3.4	The WES approach.....	29
2.3.3.5	Ritchie and Crouch’s conceptual model of destination competitiveness.....	30
2.3.3.6	The Dwyer-Kim model of destination competitiveness.....	32
2.3.3.7	Heath’s model for enhancing Africa’s sustainable tourism competitiveness.....	33
2.3.4	Factors/aspects of competitiveness	36
2.4	Conclusion	38
CHAPTER 3: A REVIEW OF TOURISM AND DESTINATION COMPETITIVENESS		39
3.1	Introduction.....	39
3.2	Empirical literature analysis.....	39
3.3	Literature review	40
3.3.1	Journal articles focussing on tourism and destination competitiveness	55
3.3.1.1	Analysis according to articles published in academic journals.....	55
3.3.1.2	Year of publication of tourism competitiveness articles	58
3.3.2	A review of the key aspects of the articles.....	59
3.3.2.1	Journal articles on tourism competitiveness according to the continent of the	
	case study	60
3.3.2.2	Journal articles conducted on tourism competitiveness from a demand or supply approach	
	60
3.3.2.3	Journal articles distributed in accordance with research focus	61
3.3.2.4	Journal articles distributed regarding research topic.....	62
3.3.3	A Review of tourism competitiveness factors or aspects	63
3.3.3.1	Top ten identified competitiveness factors or aspects	92
3.3.3.2	A Review of tourism competitiveness factors from different approaches	93

3.4	Conclusion	95
CHAPTER 4: METHODOLOGY AND RESULTS CHAPTER.....		96
4.1	Introduction.....	96
4.2	Research design	96
4.3	Research methodology	97
4.3.1	Development of a questionnaire.....	97
4.3.2	Population and Sample.....	98
4.3.3	Data analysis	99
4.3.3.1	Descriptive analysis	99
4.3.3.2	Exploratory analysis.....	100
4.4	Results.....	101
4.4.1	Descriptive results.....	101
4.4.1.1	Demographic profile and travel behaviour	101
4.4.1.1.1	Gender.....	101
4.4.1.1.2	Year of birth	102
4.4.1.1.3	Country of residence	102
4.4.1.1.4	Frequency of visits to South Africa	104
4.4.1.1.5	Companion travel of respondents	104
4.4.1.1.6	Type of tourist	105
4.4.1.1.7	Spending behaviour while visiting South Africa	105
4.4.1.1.8	Price competitiveness of South Africa as a tourist destination.....	106
4.4.1.1.9	Country's prices compared to other destinations.....	107
4.4.1.1.10	Heard about South Africa.....	108
4.4.1.1.11	Duration of visit to South Africa.....	109
4.4.1.1.13	Reason for visit.....	110
4.4.1.1.14	Attractions visited by respondents.....	110
4.4.1.1.15	Other reasons why respondents did not visit the listed attractions	112
4.4.1.1.16	Memorable experience	112
4.4.1.1.17	Return to South Africa.....	113
4.4.1.1.18	Reasons for returning to South Africa or not	113

4.4.1.1.19	Star rating of accommodation in South Africa	114
4.5.1.1.20	South Africa's safety as a tourist destination	114
4.4.1.1.21	Reasons why tourists do not consider South Africa safe	115
4.4.1.2	Aspects contributing to destination competitiveness	116
4.4.1.3	Temporal analysis	120
4.4.2	Exploratory results	124
4.5	Conclusion.....	129
CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS		131
5.1	Introduction	131
5.2	Conclusions.....	132
5.2.1	Conclusions regarding the literature reviews (Chapters 2 and 3).....	132
5.2.1.1	Chapter two: Understanding tourism destination competitiveness	132
5.2.1.2	Chapter three: A Review of tourism and destination competitiveness.....	134
5.2.2	Conclusions from the survey (Chapter 4)	137
5.2.2.1	Descriptive results	137
5.2.2.2	Exploratory results.....	141
5.3	Findings and Recommendations	141
5.3.1	General recommendations	142
5.3.2	Recommendations for future research.....	144
5.4	Challenges and limitations encountered during this study	145
Bibliography		146
ANNEXURES.....		165
Annexure 1: Letter from language editor.....		166
Annexure 2: Questionnaire.....		167

LIST OF TABLES

CHAPTER 2: UNDERSTANDING TOURISM DESTINATION COMPETITIVENESS

Table 2.1: Definitions of competitiveness.....	19
Table 2.2: Trade theories and their application to tourism	22
Table 2.3: Comparison of competitive and comparative advantage	23
Table 2.4: Competitiveness models.....	26

CHAPTER 3: A REVIEW ON TOURISM AND DESTINATION COMPETITIVENESS

Table 3.1: Articles of tourism and destination competitiveness used for the sample of the review.....	41
Table 3.2: Distribution of articles.....	57
Table 3.3: Factors or aspects of competitiveness from sample articles	64

CHAPTER 4: METHODOLOGY AND RESULTS CHAPTER

Table 4.1: Distribution of questionnaires according to timeframe and total	98
Table 4.2: Year in which respondents were born.....	102
Table 4.3: Country of residence.....	103
Table 4.4: Continent of residence	103
Table 4.5: Companion travel of respondents	104
Table 4.6: Competitiveness of South Africa's prices	106
Table 4.7: Countries with which respondents compared South Africa's prices.....	108
Table 4.8: Platforms respondents heard about South Africa	108
Table 4.9: Duration of respondents' visit to South Africa.....	109
Table 4.10: Person who initiated the visit to South Africa	109
Table 4.11: Reason for visiting South Africa	110
Table 4.12: Attractions of South Africa visited by respondents	111
Table 4.13: Other reasons why respondents did not visit listed attractions	112
Table 4.14: Memorable experiences of respondents	112
Table 4.15: Reasons for returning	113
Table 4.16: Reasons why respondents do not consider South Africa a safe destination.....	115
Table 4.17: Level of importance of factors contributing to destination competitiveness.....	117
Table 4.18: Strengths and weaknesses of South Africa as a tourist destination.....	119

Table 4.19: Temporal analysis of competitiveness aspects over the years and literature	121
Table 4.20: Temporal analysis of the strengths of South Africa between the years 2002, 2015 and 2018	122
Table 4.21: Temporal analysis of the weaknesses of South Africa between the years 2002, 2015 and 2018	123
Table 4.22: Summative results of the exploratory factor analysis	125
CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS	
Table 5.1: Summary of aspects in Chapter 3.....	137
Table 5.2: Summary of descriptive results	137
Table 5.3: Temporal analysis of important aspects of tourism competitiveness for South Africa.....	140
Table 5.4: Temporal analysis of the strengths and weaknesses of South Africa identified in all the studies.....	140

LIST OF FIGURES

CHAPTER 1: INTRODUCTION AND PROBLEM STATEMENT

Figure 1.1: The Travel and Tourism competitiveness index 2017 framework.....	3
Figure 1.2: South Africa's visitor exports and international arrivals	5
Figure 1.3: Conceptual framework of this study	6

CHAPTER 2: UNDERSTANDING TOURISM DESTINATION COMPETITIVENESS

Figure 2.1: Tourism industry	16
Figure 2.2: Porter's 5-forces model.....	27
Figure 2.3: Determinants of National Competitive advantage	28
Figure 2.5: Poon's model of destination competitiveness	29
Figure 2.4: The WES approach model.....	29
Figure 2.6: The Ritchie/Crouch Model of Destination Competitiveness and sustainability.....	31
Figure 2.7: The main elements of destination competitiveness.....	33
Figure 2.8: Towards a model for enhancing Africa's sustainable tourism competitiveness	36

CHAPTER 3: A REVIEW ON TOURISM AND DESTINATION COMPETITIVENESS

Figure 3.1: Distribution of articles over time.....	59
Figure 3.2: Journal articles on competitiveness according to continent of case study	60
Figure 3.3: Distribution of articles in term of approach	61
Figure 3.4: Journal articles distributed in accordance with research focus.....	62
Figure 3.5: Distribution of articles regarding research focus	63
Figure 3.6: Top 10 competitiveness aspectss identified from demand, supply and mixed approach ..	93

CHAPTER 4: METHODOLOGY AND RESULTS CHAPTER

Figure 4.1: Gender of respondents	102
Figure 4.2: Frequency of visits to South Africa.....	104
Figure 4.3: Type of tourists visiting South Africa	105
Figure 4.4: Spending behaviour of respondents while visiting South Africa	106
Figure 4.5: Return visitation	113
Figure 4.6: Star rating of the accommodation respondents stayed at	114
Figure 4.7: Safety of South Africa as a tourist destination.....	115

CHAPTER 1: INTRODUCTION AND PROBLEM STATEMENT

1.1 Introduction

According to the World Tourism Organisation (WTO, 2016), the latest United Nations World Tourism Organisation (UNWTO) World tourism Barometer indicated that 956 million international tourists were travelling to different destinations across the world, which makes this 34 million more than in 2015. With this growth in travelling comes increased competition among destinations which are confronted with intensified rivalry on a global scale (Eraqi, 2009:15) and destinations strive to obtain fewer restrictions for foreign visitors travelling to the different countries (Ivanov & Webster, 2013:3). Tourism is considered a global process (Harmes-liedtke & Mannocchi, 2012:47) of which South Africa has been part, resulting in the growth and international visitors increasing from 731 248 to 833 638 tourists in recent years (Stats SA, 2016). The country performed well in being competitive and was ranked 53rd out of 138 countries in 2016 according to The Travel and Tourism Competitiveness Report (2017:9).

Hamarnah (2015:81) states that the sector is accepted as one of the important sectors of development. Even though it is accepted as an important sector, tourism is known to be a complex service seeing that a trip comprises a variety of elements whereas each producer has the obligation to create an unforgettable experience (du Plessis, 2002:46). Darbellay and Stock (2012:444) state that this complexity is also formed due to the variety of factors such as cultures and people involved in tourism. Together with its complexity, tourism is described as an extremely competitive business where one needs to generate an overall understanding in relation to competitiveness and its elements in order to grasp this essential concept in tourism (de Holan & Phillips, 1997:778).

In respect of tourism, the concept competitiveness could be described as multidimensional, relative and complex, including the numerous number of elements which make it problematic to measure (Enright & Newton, 2005:349; Eraqi, 2009:15; Gooroochurn & Sugiyarto, 2005:25; Navickas & Malakauskaite, 2009:38; Ritchie & Crouch, 2010:1050). This could make it problematic to understand the concept *competitiveness* and all its components, especially within the tourism industry. Confusion exists on how to optimise position due to the misunderstanding especially in different scenarios, different destinations, developed or developing countries, different sectors in the tourism industry, to name but a few. It could be seen as problematic that competitiveness consists of a wide range of elements such as the variety of definitions researched by scholars such as Enright and Newton (2004), Porter (1990), and Ritchie and Crouch (2003), to name but a few. For the sake of this study, the definition of Ritchie and Crouch (2003) is used as basis. Ritchie and Crouch (2003:2) states that “what makes a tourism destination truly competitive is its ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations.”

Other studies such as those of Dupeyras and MacCallum (2013), Dwyer and Kim (2003), Enright and Newton (2005), Heath (2002), Gomezelj and Mihalic (2008), Gooroochurn and Sugiyarto (2005), Hafiz,

Hanafiah, Hemdi and Ahmad (2016), Hong (2009), Mihalič (2000), Pansiri (2014) and Ritchie and Crouch (2010) focussed on factors/aspects/indicators of tourism or destination competitiveness. Competitiveness models were researched by scholars such as Croes (2010), Crouch (2011), Dwyer and Kim (2003), Enright and Newton (2004), Mazurek (2014), Porter (1990), Ritchie and Crouch (2000), Ritchie and Crouch (2003) and Vodeb (2012).

One way of addressing this problem is to review the different opinions on the aspects of competitiveness in order to gain a better understanding of the concept. It is also very important to investigate the perceptions from both the demand and supply side, because most of the studies on competitiveness investigated the supply side of tourism competitiveness. This study firstly conducted a comprehensive literature review analysis and secondly a demand analysis of the factors of tourism competitiveness.

These aspects will be further discussed in detail. First, the background to the study will be discussed to provide some context. Next, the problem statement and the goals and objectives of the study will follow. Hereafter the method of research will be discussed, followed by a literature and empirical study. Clarification of the concepts used in this study will be given next and finally, the classification of chapters will follow.

1.2. Background to the study

The questions why some industries, businesses and nations advance and prosper and why some nations succeed and others fail in international competition has been the research focus of various scholars across various industries (du Plessis, 2002:1). Many countries and companies across the world examined these questions to seek standards of what are commonly called “competitiveness” (Porter, 1990:76).

The competitiveness of a country, in this case South Africa as 53rd ranked, and is determined by the World Economic Forum's Travel and Tourism Competitiveness Index. The statistics provided by the Index is compared with previous years' ranking of South Africa's competitiveness, which showed that South Africa has dropped five places, from 48th to 53rd since 2015. This position is due to the fact that even though South Africa relies on its cultural (19th) and natural (23rd) resources, there are two elements, safety and security (120th) as well as environmental stability (117th), that impacted negatively on the overall competitive position of South Africa (The Travel and Tourism Competitiveness Report, 2017:35). Thus meaning that, although South Africa has a number of elements enabling the country to move up the competitiveness ladder, there are still some elements South Africa needs to work on to excel.

In order to obtain these rankings, a specific Travel and Tourism Index Framework is utilised in which the competitiveness ranking is then determined. The four main categories are: enabling environment, Travel and Tourism policy and enabling conditions, infrastructure as well as natural and cultural resources. This is illustrated in Figure 1.1.

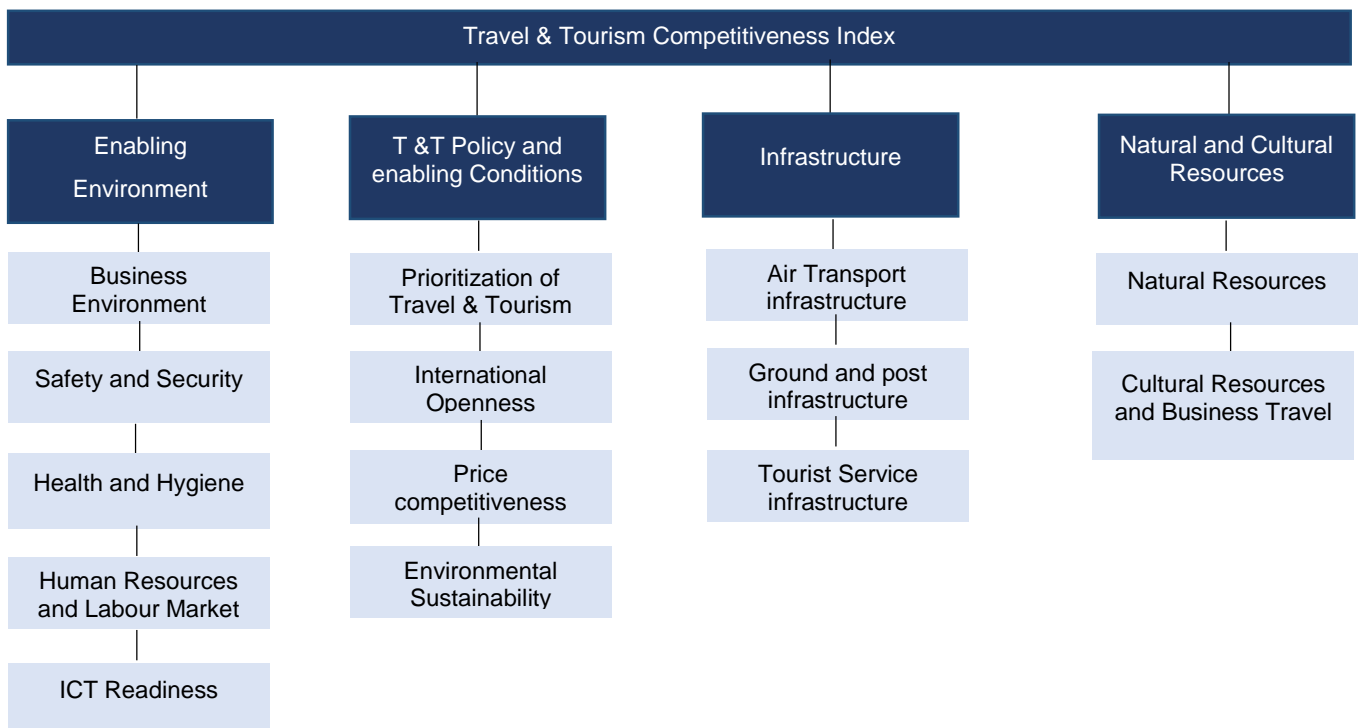


Figure 1.1: The Travel and Tourism competitiveness index 2017 framework

Source: The Travel and Tourism competitiveness Report (2017:xiv)

Although clear guidelines have been set by the WTO and the Travel and Tourism Competitiveness Index, it seems as if confusion still reigns on how to maintain and sustain a competitive advantage. Hong (2008:34) is of the opinion that this confusion lies in the absence of the predominant definition of competitiveness. In 1980 Michael Porter, a researcher that primarily focused on competitiveness at the firm and business level, started researching competitiveness. In 1995 Porter and van der Linde (1995:97) provided the definition for competitiveness at industry level, claiming that it is the result of “superior productivity either in terms of lower costs than rivals or the ability to offer products with superior values that justifies premium price.” It was Porter (1980:31) who first suggested that organisations need to obtain a competitive advantage in order to remain in the foreground ahead of the competition. This demonstrates the beginning of more in-depth research on the concept *competitiveness* within different sectors.

It was only after 1993 that researchers in tourism started examining international competitiveness with tourism destinations as the main focus. This was based on the work by Porter. Poon (1993:3) stated that being competitive no longer means surviving, but leading. He emphasised that competitive strategies are more important to ensure that industry players and tourism destinations stay ahead of the game: “for to lead is to win!” (Poon, 1993:3). Other scholars such as, Crouch and Ritchie (1999), du Plessis (2002), Dwyer and Kim (2003), Schwab (2017) and WTO (2012) continued investigating tourism competitiveness whereas other researchers focussed on the comparative advantage a destination can obtain (du Toit, Fourie & Trew, 2010; Freytag & Vietze, 2009; Siggel, 2007).

These two terms, competitiveness and comparative advantage, can be used interchangeably (Zhang & Jensen, 2015:1) or distinctive from each other (Dwyer & Kim, 2003:373; Neary, 2003:9; Siggel, 2007:3).

Retaining a comparative advantage means that there are certain resources accessible to the destination whereas competitive advantage is associated with the ability a destination has to use these resources efficiently over the long term (Crouch & Ritchie, 1999:143). Hence, both of these concepts are considered essential for a destination (Dwyer & Kim, 2003:373). This opinion concerning competitive and comparative advantages may differ between industries.

It is however clear that the majority of these researchers (Knežević Cvelbar, Dwyer, Koman & Mihalič, 2016; Stickdorn & Zehrer, 2009; Zehrer, Muskat & Muskat, 2014) focussed primarily on the supply side in the case of tourism enterprises and the opinions from tourists (demand) have not been explored in respect of destination competitiveness. Filling that literature gap could assist destinations in identifying competitiveness aspects or factors from both the demand and supply side, which will enable tourism businesses to provide desirable products and services for tourists/visitors. There will be more clarity as to which aspects make a destination more competitive from a tourist's point of view, which are what a destination needs to generate income. This refers to the demand factors or aspects as identified by different authors such as Dwyer and Kim (2003), Enright and Newton (2005), Heath (2003) and Ritchie and Crouch (2003). du Plessis, Saayman and van der Merwe (2015:2) referred to these factors as internal and external factors.

The studies, as mentioned above, also showed that there are certain factors or aspects that may influence competitiveness and that the impact thereof changes constantly due to the uniqueness of the specific destinations. This emphasises the need for continuous research on these factors/aspects due to the complexity of the tourism industry (Baggio, 2008:4; Harmes-Liedtke & Mannocchi, 2012:48), the impact of internal and external factors or aspects (Heath, 2002:349; du Plessis *et al.*, 2015:2) and the absence of a universally accepted definition of tourism and destination competitiveness (Mazanec, Wöber & Zins, 2007:93; Santos, Ferreira & Costa, 2014:73).

These above-mentioned aspects will be discussed within a South African context. "In 1997 tourism was the fourth-highest foreign exchange earner in South Africa", despite the fact that the country was rated as one of world's 10 most dangerous countries in the same year (Ferreira & Harmse, 2000:80). Fortunately, for South Africa, Rogerson (2002:33) states that tourism holds the potential of being one of the key drivers of economic growth in the 21st century. This is largely as a result of huge tourism organisations (e.g. Protea and Sun International) which dominate South Africa's tourism economy (Rogerson, 2004:273). Tourism's potential to be a key economic driver in South Africa is due to the fact that there are many factors or aspects favouring the different destinations. This includes, amongst others, its wildlife and cultural experience (Witz, Rassool & Minkley, 2001:278), which contributes to South Africa's competitiveness. Although numerous studies on destination competitiveness have been conducted worldwide, a scarcity of literature is evident that focuses on Africa (du Plessis *et al.*, 2015:6).

Research conducted by du Plessis (2002:102) concurs with these statements and states that South Africa is considered globally competitive due to, amongst others, its unique geographical features, climate, superb scenery, history and cultural history. South Africa's potential in this regard is depicted in Figure 1.2, where the growth in visitor exports and the total tourist arrivals are illustrated. The World Tourism and

Travel Council [WTTC] (2017) predicted that South Africa will attract 10,722,000 international tourists in 2017, which is 4% more than previous years. In 2017 the tourist arrivals to South Africa increased with 5% (South African Government, 2017:22), which is even more than was initially predicted. South Africa thus holds the potential of becoming more competitive seeing that it can improve the total tourist arrivals.

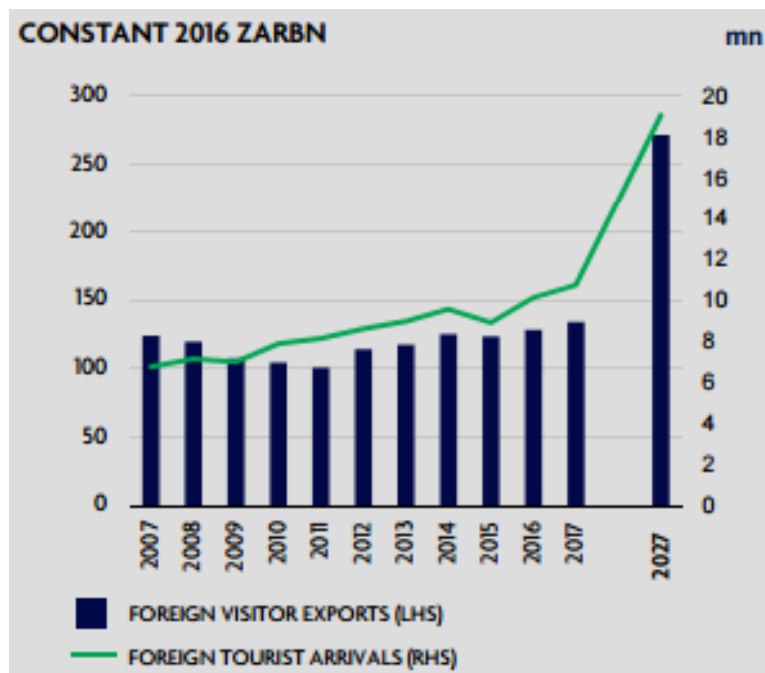


Figure 1.2: South Africa's visitor exports and international arrivals

Source: WTTC (2017:5)

As depicted in Figure 1.2 the foreign tourist arrivals showed a constant increase from 2007 to 2017 which is a good sign for South Africa's tourism. In other words, there are signs of improvement in the last years due to the growth in tourist arrivals. The problem, however, is that practitioners are provided with guidelines of improving competitiveness, but not specific to content and context (developed or developing country, from demand or supply side approach). This current issue can be solved by providing them with destination-specific research, for example what the demand factors of South Africa are. In a nutshell, the literature on competitiveness is filled with an abundance of elements, whereas the focus within this study will be on these elements as indicated in Figure 1.3. In short, Figure 1.3 indicates the aspects that will be investigated in the course of this study.

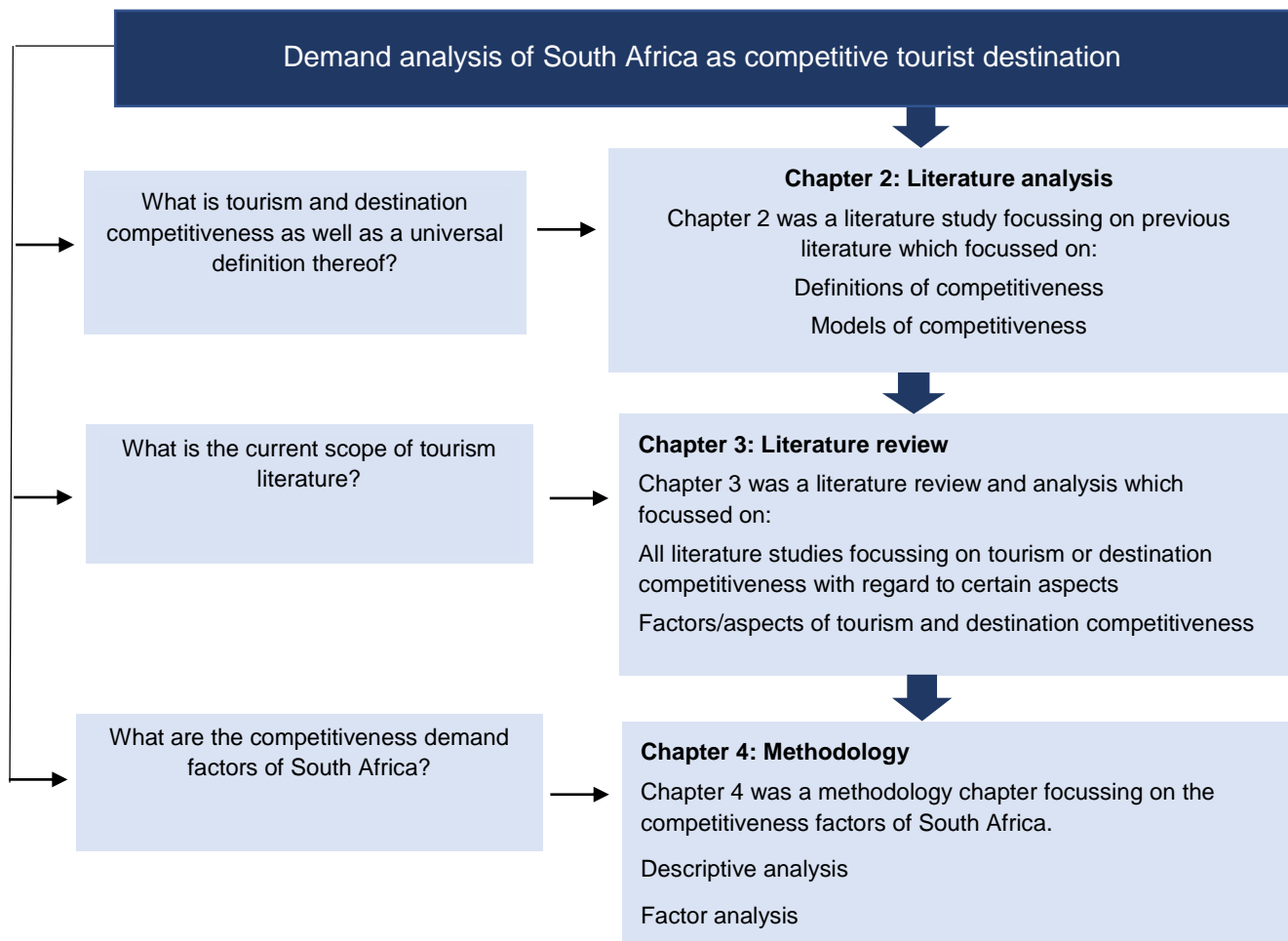


Figure 1.3: Conceptual framework of this study

Source: Author's own composition

It is thus clear from the discussion that researchers are still seeking for more clarity concerning competitiveness. Therefore, as mentioned earlier, this study aims to conduct a literature review on competitiveness as study field and conduct a demand side analysis of the competitiveness of South Africa.

1.3 Problem statement

South Africa is currently ranked 53rd globally and aims to improve its competitive position, which raises the question: What is tourism and destination competitiveness? It is clear that there is some confusion within literature as to what *competitiveness* is (Hamarnah, 2015:82). This confusions stems from discrepancies between definitions, identified factors or aspects of tourism destinations and models of competitiveness in the tourism industry, which highlights the question of the relevant information that is being portrayed in the literature.

This comprehensive and diverse research conducted on tourism or destination competitiveness created the need to conduct a literature review and analysis on the topic to fully understand this study field. Authors such as Crouch (2011), Crouch and Ritchie (1999), du Plessis *et al.* (2015), Dwyer, Mellor, Livaic, Edwards and Kim (2004), Go and Govers (2000), Heath (2002;2003) and Ritchie and Crouch, (2003), to name but

a few, all published articles on the topic. The research conducted by these authors were predominantly based on perceptions from a supply side, which proposes the need for more demand studies focussing on competitiveness of tourism destinations. In this case, the demand perspective focusses on the tourist's opinion of competitiveness. This is important when determining destination competitiveness because, the destination might be competitive for the suppliers in tourism, but not for the tourists (Omerzel, 2006:182) and the tourist forms part of the foundation of a destination (Priem & Swink, 2012:7).

Hence, based on the discussion above, the research question is: **What are South Africa's competitiveness factors, as a tourist destination, viewed from a demand point of view?**

1.4 Goal of the study

To ensure the effectiveness of the study, certain goals and objectives need to be reached.

1.4.1 Goal

The goal of this study was to conduct a demand analysis of South Africa as a competitive tourist destination.

1.4.2 Objectives

The achievement of the goal relied on the following objectives:

Objective 1: To analyse competitiveness by means of a literature overview and conceptualise the definitions, models and aspects/factors of competitiveness as well as the comparison between competitiveness and comparative advantage as research field.

Objective 2: To conduct a comprehensive literature review and analysis which will be based on previous research studies done on the competitiveness of destinations within the tourism industry.

Objective 3: To investigate the competitiveness of South Africa as a tourist destination from a demand point of view by means of empirical research.

Objective 4: To draw conclusions acquired from the previous chapters and establish recommendations which will assist in the improvement of South Africa as a competitive tourism destination.

1.5 Research methodology

Methods are referred to as the tools used by researchers to collect data or conduct research (Walliman, 2011:1). It is evident that the methodology includes the methods of research which will be used during this study. The research methodology consists of two sections, namely the literature study and the empirical study.

To gain more insight into the most universally used definition and model of competitiveness within the tourism industry as well as clarity on the difference between *competitiveness* and *comparative advantage* one needs to conduct both a literature study and an empirical survey. A brief overview is stated in this

chapter concerning the research methodology. A detailed description of the method used is described in chapter 4.

1.5.1 Literature Study

The first two goals of the study involve conducting a literature study. A comprehensive study discussed the variety of opinions and complexity of competitiveness as well as distinguishing between *competitiveness* and *comparative advantage*. A search was conducted on the following databases: Google Scholar, EBSCOHost, Ferdinand Postma Catalogue, Research gate, Jstor and Crossref in order to guarantee that no other comparable study has been conducted. Countless studies focus on competitiveness and primarily, those of Clergeau (2013), Crouch and Ritchie (1999), de Holan and Phillips (1997), du Plessis (2002), Dwyer and Kim (2003), Go and Govers (2000), Heath (2003), Kozak (2002), Mihalič (2000), Navickas and Malakauskaite (2009), Porter (1990), van der Merwe (2015) and Vengesai (2003) were all used as a literature base for this current research.

Key words used to obtain the required information are *competitiveness*, *comparative advantage*, *destination competitiveness*, *Tourism industry*, *Tourism competitiveness*.

1.5.2 Empirical survey

The empirical survey strives to clarify the research design, participants and measuring instruments and to describe the data analyses. In the following section the methods chosen for conducting this study are highlighted.

1.5.2.1 Research design and method of collecting data

A research design includes the “decisions regarding what, where, when, how much, by what means concerning an inquiry or a research study constitute a research design.” (Kothari, 2004:31). Malhotra (2010:102) adds that a research design is the “blueprint” for conducting research. A good research design is considered the first rule of decent research. Bono and McNamara (2011:659) emphasise the importance of the research design complementing the question, matching with the descriptions of the processes, delicately stipulating the model, using procedures with established construct validity and selecting appropriate samples. Furthermore, the researchers need to follow the research design in order to accomplish the research objectives (McDaniel & Gates, 2010:76).

The descriptive research design was primarily used because it assists in providing answers to the questions what, where, when and how (Burns & Bush, 2014:106). A descriptive research design is used when the researcher has prior knowledge of the research problem at hand, but endeavours to describe the results even further or make the answer more clear (Malhotra, 2010:106). The problem concerning universally accepted definition, model or factors is that tourism competitiveness aspects, factors, indicators and models of competitiveness for specific destinations from different research articles needed to be investigated. Hence the choice of following the descriptive research design – it answers the questions who, what, when, where and how (McDaniel & Gates, 2010:77).

Supplementary to descriptive research, an exploratory research design was also applied seeing that background information, defining of terms and clarifying of the problem is needed in this research (Burns & Bush, 2014:106). Exploratory research includes exploring a certain research problem in order to provide an understanding of the problem (Malhotra, 2010:104). In other words, it is a new problem or topic that has not yet been researched and needs to be explored and solved.

Seeing that the descriptive and exploratory research designs are used, questionnaires were distributed to respondents, at OR Tambo, who were requested to convey their opinions on the specific topic (Quick & Hall, 2015:194), which in this case was *the competitiveness of South Africa as a tourist destination*.

Furthermore, a literature review and analysis were conducted to thoroughly provide clarity regarding competitiveness and the aspects thereof. Literature reviews do not report any new information, but simply review previous literature (Ward-Smith, 2016:254). It is however essential to first understand what a literature review entails before one can continue conducting one. Ward-Smith (2016:253) describes a literature review to be a method used to determine how the specific concept, in this case competitiveness, has been researched in the past, the results and recommendations as well as where more research is needed. The reason for conducting a review is simply because it generates a definite basis for improving knowledge (Webster & Watson, 2002:xiv), and it assists in avoiding any form of duplication of similar research and in identifying major gaps within the particular industries (Grant & Booth, 2009:97).

1.5.2.2 Development of a questionnaire

Two main methods for collecting data exist, namely quantitative and qualitative. In this case a quantitative method was followed. Quantitative research is defined as involving structured questions with predestined answers whereas qualitative research includes “collecting, analysing and interpreting data” (Burns & Bush, 2014:146). When deciding which research method to use, one should consider some of the advantages and disadvantages thereof. McCusker and Gunaydin (2015:539) maintain that quantitative data is known to be more efficient seeing that it is able to test hypotheses, but it could possibly fail to recognise all contextual detail. Together with this originates the advantage of objectivity of quantitative research seeing that the researcher is distanced from the respondents (Quick & Hall, 2015:192). A quantitative research method was followed; therefore questionnaires were distributed. A questionnaire consists of questions that are presented to participants who are willing to participate and answer these questions as well as frequency counts where conclusions are drawn regarding the responses from the sample (Leedy & Ormrod, 2005:161). This questionnaire was designed in collaboration with TREES with both structured and unstructured questions. The questionnaire comprises two sections:

Section A: Demographic profile and travel behaviour that included questions such as gender, year of birth, country of residence, reasons for visit, annual gross income, duration of visit, reason for visit and attractions visited.

Section B: Focused on the Motivations of tourists to South Africa and factors contributing to competitiveness of South Africa as a tourist destination based on the questionnaire developed by du

Plessis (2002) and van der Merwe (2015) which developed the survey on the work of Porter (1990) and Ritchie and Crouch (1993).

1.5.2.3 Sample

The population is defined as the whole group that is targeted in the survey (Burns & Bush, 2014:147). The population of this study comprised of tourists travelling from South Africa at OR Tambo International Airport in Johannesburg back to his/her foreign country. For purposes of this study, non-probability sampling was followed and used a convenient sampling. A non-probability sampling method was undertaken which means that not all of the participants were given equal chances of being included in the study while gathering the data (Etikan, Musa & Alkassim, 2016:1). The sample is therefore only a part of the whole population. This was the case seeing that OR Tambo is a large airport with large numbers of people moving around in the different areas, and through non-probability sampling it is much quicker to obtain the data. In 619 completed questionnaires were obtained.

1.5.2.4 Data analysis

SPSS was used in order to capture the data obtained. The data were reported by using frequency tables as well as figures. The data analysis can be divided into two parts.

1.5.2.4.1 Descriptive analysis

It is important to use descriptive statistics for analysing the obtained data. Leedy and Ormrod (2005:146) state that descriptive statistics is what the data looks like. This meaning that one looks at the responses of each of the questionnaires and then summarises it by observing means, standard deviations, percentages and frequencies. Furthermore, the mean standard deviations was calculated in order to determine the overall perceptions of tourists regarding what makes South Africa competitive. The descriptive analysis were divided in three parts namely the demographic profile and travel behaviour, aspects of competitiveness as well as a temporal analysis.

- Demographic profile and travel behaviour

The demographic profile and travel behaviour part of the descriptive analysis included analysing the demographic aspects of the respondents such as their gender, age and country of residence. The demographic was compiled by studying the population (ACAPS, 2014:4). The travel behaviour aspects included reason for visit, attractions visited by respondents as well as the star rating of accommodation the respondent stayed at.

- Aspects of tourism competitiveness

This part of the descriptive analysis included analysing the aspects of competitiveness, as indicated on the questionnaire. These aspects were obtained from previous surveys based on the work of Porter (1990) and Ritchie and Crouch (1993). This was followed by analysing the strengths and weaknesses of South

Africa as a tourist destination. The same aspects of competitiveness were applied to determine which of these aspects are considered strengths or weaknesses.

- Temporal analysis

A temporal analysis was also conducted as part of the descriptive analysis. Research on tourism and destination competitiveness has been thoroughly researched. The question however is whether the research conducted in the past still is relevant today. Temporal is referred to as “limited by time” (Oxford, 2010:1539). Therefore a temporal analysis can be referred to as a timeline which indicates how things have changed or stayed the same over time (Revyakin, Allemand, Croquette, Ebright & Strick, 2003:557). In this study, conducting a temporal analysis would mean that the data from different periods (2002, 2015 & 2018) were compared. The changes of South Africa’s competitiveness aspects/factors over time, makes it essential to conduct a temporal analysis, seeing that over time the factors/aspects has changed.

1.5.2.4.2 Exploratory analysis

An exploratory analysis gathers information regarding interrelationships among a set of variables (Pallant, 2016:182). The exploratory analysis of this study included a factor analysis which is described as a well-known statistical method used to discover unnoticed variables and then provides clearance of the variable amongst others (Albright, 2006:1).

- Factor analysis

Kline (1994:1) states that a factor analysis includes a variety of statistical techniques which are used in order to simplify difficult sets of data. While conducting a factor analysis the aim is to summarise large sets of data in groups or categories (Pallant, 2016:182). Factor analysis can be used for different circumstances such as identifying underlying factors to make sense of variables (Malhotra, 2010:636).

Descriptive research is “theory-driven” therefore the preparation of the analysis is determined by theoretical relations among observed and unobserved variables (Schreiber, Nora, Stage, Barlow & King, 2010:323). In this case an exploratory factor analysis was conducted in order to formulate groups (factors) out the competitiveness aspects as identified by the respondents. A factor analysis includes the gathering of information concerning the interrelationships of different variables (Pallant, 2016:182).

1.5.3 Ethical clearance

The fieldworkers that assisted in handing out the questionnaires at OR Tambo were trained and provided by Ratile Research, which is a research company. Ratile Research conducts research at OR Tambo and, for this study, was used to perform the research. These fieldworkers provided by Ratile Research needed to explain to the respondents what the purpose the survey was to ensure that they know exactly what their role and contribution are in the research. Before commencing with the research at the airport, the researcher needed to obtain consent from Ratile Research to conduct the research. The fieldworkers reassured the respondents that their participation is voluntary and that their responses are anonymous

and would be used for only research purposes. Ethical approval was obtained from the Ethics Committee of North-West University (Potchefstroom Campus: EMS28/04/16-02/04).

1.6 Defining key concepts

The following key concepts were used during the current study:

1.6.1 Comparative advantage:

Comparative advantages establish the available resources of a destination (Zhang & Jensen, 2015:1). Dwyer and Kim (2003:372) explain that a comparative advantage relates to gifted resources, for example fauna and flora as well as climate.

1.6.2 Competitiveness:

Porter and van der Linde (1995:97) provided the definition for competitiveness at industry level: “superior productivity either in terms of lower costs than rivals or the ability to offer products with superior values that justifies premium price.” Nonetheless, tourism competitiveness, specifically, is an over-all concept that includes price distinctions, exchange rate activities, productivity of numerous components of the tourist industry as well as aspects which have an effect on the tourist destination (Dwyer, Forsyth & Rao, 2000:9).

1.6.3 Destination competitiveness

Ritchie and Couch (2003:2) state that destination competitiveness refers to a situation in which a destination is capable of increasing the tourism expenditure, attracting visitors and providing tourists with satisfying, memorable experiences while at the same time being profitable, improving welfare of local residents as well as protecting natural money for future generations. Furthermore, destination competitiveness is described as a destination’s ability to deliver goods and services that are capable of performing better on aspects that are important to tourists (Dwyer & Kim, 2003:369).

1.6.4 Literature review

Machi and McEvoy (2016) define literature review as being characterised as an argument which is obtained from preceding research. Furthermore, a literature review is described as a group of summaries of research papers done in the past regarding the relevant topic or expanded interpretation of numerous research manuscripts (Webster & Watson, 2002: xiii).

1.6.5 Tourism

The World Tourism Organisation (UNWTO, 2008:2) describes tourism as an “activity” in which tourists partake outside their normal environment for various reasons, for example leisure, business, exceeding twenty-four hours, but less than a year. Saayman (2013:3) describes tourism as the “total experience that

originates from the interaction between tourists, job providers, government systems and communities in the process of providing attractions, entertainment, transport and accommodation to tourists.

1.6.6 Demand analysis

Demand is described as the readiness, ability or need of consumers or tourists to buy a given amount of a good or service at a given price and time (CFA Institute, 2017:2). A demand analysis provides a framework for the influences of the demand (Knight & John McGee, 2014:1).

1.6.7 Tourist destination

A tourist destination is defined as an “open system” that attracts tourists to destinations (Rodríguez-Díaz & Espino-Rodríguez, 2008:368). It is also defined as a mixture of tourism products or experiences that are provided to tourists visiting the destination (Buhalis, 2000:97). Bornhorst, Ritchie and Sheehan (2010:572) define a tourist destination as a geographical area which could be a big attraction that strives to provide tourists or visitors with a variety of memorable experiences.

1.7 Chapter classification

Chapter one includes the introduction to the study, problem statement, goals and objectives, explanation of the methodology as well as a clarification of concepts.

Chapter Two consists of a literature review for analysing the definitions, factors or aspects and models of competitiveness.

Chapter Three comprises of a literature review and analysis. This Chapter is founded on previous studies conducted on specifically the definitions, models and aspects or factors of competitiveness within the tourism industry.

Chapter 4 contains the methodology chapter which determined the competitiveness of South Africa as a tourism destination from a demand point of view. This is examined, by means of a questionnaire, what tourists visiting South Africa think makes a destination competitive.

In the final chapter (Chapter 5) conclusions are drawn that are obtained from the previous chapters. Furthermore, recommendations are made in this chapter to improve South Africa’s competitiveness as a tourism destination.

CHAPTER 2: UNDERSTANDING TOURISM DESTINATION COMPETITIVENESS

2.1 Introduction

The success of a destination largely depends on its ability to sustain a competitive advantage (Ritchie & Crouch, 2003:29). Various researchers highlighted the importance of competitiveness as a management tool to sustain a destination's competitive advantage. Thus in Chapter 2 an advantage were highlighted as the ability of the destination to identify its competitive factors or aspects, models, and a definition were given of what it truly means to be competitive. Chapter 2 therefore provides a literature background as foundation for the succeeding chapters which will assist in reaching the first objective which aims at analysing competitiveness by means of a literature overview and conceptualise the definitions, models and aspects/factors of competitiveness as well as the comparison between competitiveness and comparative advantage as research field. These mentioned aspects of competitiveness can be applied within various industries and disciplines (Hong, 2008:4; Santos *et al.*, 2014:73; Tsai, Song & Wong, 2009:522) but in this case competitiveness is discussed within the tourism industry. Thus the aim of this chapter is to contextualise competitiveness within the tourism industry.

2.2 The analysis of the tourism industry

The United Nations World Tourism Organisation (UNWTO) (1995) defines tourism as including all the activities that a person partakes in whilst travelling to different places and staying outside their normal working environment for less than one year. It was already characterised as the foremost leisure activity in the 21st century back in 2007 (Claver-Cortés, Molina-Azorí & Pereira-Moliner, 2007:727). Tourism then developed from an "elite practice to industry-driven mass tourism" over the years (Darbelly & Stock, 2012:445), which influenced its economic activities to become one of most essential economic drivers worldwide (Baggio, 2008:1; World Travel and Tourism Council [WTTC], 2016). UNWTO (United Nations World Tourism Organisation, 2016) agrees that over the past 60 years tourism has continued to grow, and then became one the largest as well as the fastest-growing sectors of the economy. It is agreed by various scholars that tourism is therefore considered an essential mechanism for a country's economic growth and development (Balan, Balaure & Veghes, 2009:979; Das & Dirienzo, 2010:477).

Numerous destinations are dependent on this growth to obtain economic success (Azzopardi & Nash, 2017:247). Heath (2003:125) concurs by affirming that tourism is considered an efficient way in which poverty can be eased in order to achieve sustainable growth as well as assist in increasing the economic welfare of local communities (Webster & Ivanov, 2013:137). The travel and tourism industry contributed 7.61 trillion US Dollars to the global economy during 2016 (Statista, 2018). UNWTO (2016:2) highlights tourism's importance further by stating that: "International tourism represents 7% of the world's exports in goods and services, after increasing one percentage point from 6% in 2015." Coupled with this the international tourist arrivals increased with 46 million from 2015 to 2016; meaning that there was a growth

of 3.9% (UNWTO, 2016:3). The UNWTO (2016:3) proclaims an expected increase of 3.3% a year for the growth of tourism between 2010 and 2030; reaching 1.8 billion tourist arrivals in 2030.

The importance and growth of the industry, as stated above, then created a need to define and measure specifically tourism destination competitiveness (Mazanec, *et al.*, 2007:86) due to the fact that tourism is implemented at a destination which is in competition with other destinations. The management of destinations is essential in studying the tourism industry (Pike & Page, 2014:204) which will in the end contribute to the competitiveness of a destination. In order to comprehend what tourism destination competitiveness exactly is and entails, one needs to first answer the question: what is considered a destination?

According to tourism literature, tourist destinations are characterised as one of the industry's most essential concepts (Andergassen, Candela & Figini, 2013:86). Due to its importance, numerous studies such as those of Andergassen *et al.* (2013:86) and Đurašević (2015:82) have strived to define the term destinations in order to improve the competitiveness of tourism destinations and to establish what will make one destination more competitive than the other. This concept is challenging to define (Haywood, 1986, as cited by Baggio, Scott & Cooper, 2010:51) seeing that tourists use destinations for various reasons (Buhalis, 2000:103). In the study conducted on destinations by Buhalis (2000:97) there is a variety of definitions but one of these could be: the delivery of a mixture of products and services offered by tourism.

Destinations need to provide unique products and services as well as benefits in order to persuade tourists to choose their destination above others (Crouch, 2011:27). When a destination can manage to persuade tourists to choose their destination, there will be growth in tourist arrivals for this destination. This results in an increase in visitors that base their judgement on the resources and attractions a destination offers, because products or services determine whether or not the tourists will be attracted to it (Gomezelj & Mihalic, 2008:294). Therefore destinations are classified as complex (du Plessis, *et al.*, 2015:3). This can also partially be ascribed to the different owners of tourism businesses supplying a service to the tourists (Howie, 2003:1) and the interaction between tourism businesses (Baggio *et al.*, 2010:51). It is clear that researchers agree that a destination is complex, which is also the case with tourism (Baggio, 2008:4).

This is also due to a variety of reasons, including, amongst others, the fact that tourism is regarded a "service-intensive industry", meaning that it is dependent on how customers rate the services at the tourist destination as well as its provision of services that increases its complexity (Zehrer *et al.*, 2014:353). This service-delivery component contributed to the development of the tourism product (Dwyer & Kim, 2003:382), due to its intangibility (Saayman, 2013:8) which therefore increased tourism's complexity (Zehrer *et al.*, 2014:354).

This complex industry must strive to continuously improve the tourist's satisfaction, which could be implemented by delivering high-quality service and correctly applying the elements of tourism (Forgas-Coll, Palau-Saumell, Matute & Tárrega, 2017:246). These elements provide clarity as to how tourism works with regard to the interactions within the industry. It can also increase the complexity of tourism, because

there is no singular aspect that needs to be taken into consideration whilst striving to improve the competitiveness of a tourist destination. On the contrary; various elements exist such as those illustrated in Figure 2.1. What makes tourism even more complex is the fact that just one of these elements alone can influence the destination's competitiveness overall (Darbellay & Stock, 2012:443). An example of this statement could be that if the attractions element of a destination is not competitive enough compared to that of other destinations, it could lead to prospective tourists not having a reason to visit the destination and thus influencing its competitiveness.

These elements include the interactions or encounters among the providers in tourism in order to provide certain services. In other words, the tourism industry needs tourists, job providers, government systems and communities to provide attractions, entertainment, transport as well as accommodation, which is the tourism product as illustrated in Figure 2.1.

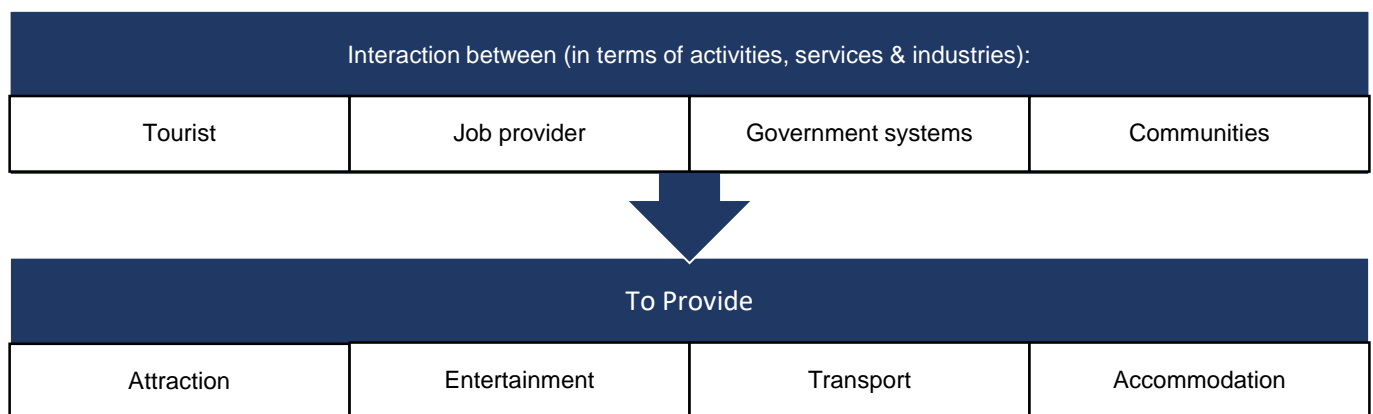


Figure 2.1: Tourism industry

Source: Saayman (2007:2)

The elements in Figure 2.1 must all be of a high standard in order to improve the competitiveness of the destination. For example, in South Africa's case, its transport element was characterised as a shortcoming in the year 2016 (Schwab, 2017:269), meaning that it could influence the destination's competitiveness seeing that the prospective tourist could be dependent on transport to visit the destination as well as get to attractions. It is therefore important to have knowledge of what the elements are and that it can indeed influence the opinion of tourists and can have an effect on the destination's competitiveness. Thus one needs to consider, amongst others, the destination, tourism product and the destinations' elements when considering its competitiveness. If a destination can succeed in achieving this, the competitiveness of the destination will increase seeing that some of the elements which could influence its competitiveness ranking is taken into consideration.

Together with these elements a destination is competitive if it has the ability to attract potential tourists and provide them with tourist satisfaction (Tsai *et al.*, 2009:522). There are elements that influence these tourists' motivations and expectations of their destination choices (Jennings & Nickerson, 2006:68). Competitiveness is essential for a destination's success and for ensuring its prosperity (Go & Govers, 2000:80; Gooroochurn & Sugiyarto, 2005:26; Mazanec *et al.*, 2007:94) due to the competition that exists between these destinations (Cracolici, Nijkamp & Rietveld, 2008:325).

For destinations to compete globally in the tourism industry, they have to obtain and sustain a competitive advantage. High or superior performances are related to competitive advantages (DeFillippi, 1990, as cited by Hafiz Hanafiah *et al.*, 2016:251). To understand the role competitiveness plays within tourism, it is essential to firstly define and describe this concept (Hamaneh, 2015:81).

2.3 Analysing the concept Competitiveness

Abreu-Novais, Ruhanen and Arcodia (2017:324) point out that there is an increased interest in striving to measure the competitiveness of destinations and to identify the factors or aspects that assist in enhancing their competitive positions. It is beneficial to the tourism industry and government to have knowledge of the changing nature of competitiveness and the reason for it occurring (Dwyer *et al.*, 2000:10). Besides its changing nature, competitiveness is a possible solution for the sustainable development of the tourism industry (Abreu-Novais *et al.*, 2017:326) and can be achieved by ensuring that the destination's appeal and services are better than those of their competition so that potential visitors choose them instead (Dwyer & Kim, 2003:369). Current and potential tourists visiting a destination are linked to the competitiveness of a destination (Dwyer & Kim, 2003:369). A destination that is proclaimed more competitive, according to Dwyer and Kim's definition, could automatically receive more tourists seeing that these tourists will choose the specific destination over other competing destinations. However, competitiveness has been discussed and researched within a variety of disciplines, fields and industries whereas each of these fields proposed different perspectives on defining this concept (Santos *et al.*, 2014:73).

2.3.1 Definitions of competitiveness

Competitiveness originally is derived from the Latin word "competer", meaning the competition could apply to the competition between businesses (Plumins, Sceulovs & Gaile –Sarkane, 2016:380). The concept *competitiveness* still lacks a predominate definition (Alexandros & Metaxas, 2016:66; Harmaneh, 2015:82), however the primitive principle in the philosophy of science indicates that definitions "are neither true nor false", but can appear to be less valuable regarding its contribution to formulating a hypothesis (Mazanec *et al.*, 2014:86).

Michael Porter was the first researcher to investigate competitiveness on a firm level (Porter, 1980). Porter (1980:32) states that, irrespective of the industry, the competitiveness intensifies as soon as competition arrives. Porter and van der Linde (1995:97) proclaimed that "competitiveness at industry level arises from superior productivity, either in terms of lower costs than rivals or the ability to offer products with superior values that justifies premium price." Therefore national competitiveness is linked to "productivity" (Porter, 1990:76). Porter (1990:76) then further added that competitiveness has various meanings for different people. On firm-level some of the definitions are concerned with the ability of a firm to compete globally (Porter, 1990:90). For economists, competitiveness means to regulate the exchange rates by having low cost of labour (Porter, 1990:73). Porter (1990:76) continues his discussion by suggesting that companies are competitive if they continuously enhance the overall operational effectiveness of the company.

A business is also competitive if it manages to sell goods or services at a profit and clients choose to buy from them instead of from competition that has products of a better quality (Coyne, 1986:55). These formulated opinions are from a firm, business and industry level (Krugman, 1996:20; Tsai *et al.*, 2009:522) which was the first level at which competitiveness was researched. Nonetheless, competitiveness remains essential for organisations to obtain success (Porter, 1980:37), regardless of the type of industry or context. Reinert (1998:2) states a standard definition on firm-level, which is the ability of a firm or company to compete against its competition to show growth and to obtain sustainable profitability.

Porter's work on competitiveness is also applicable to the tourism industry even though the tourism product is different in the sense that the experience is sold and not a physical product that can be viewed and tested (du Plessis *et al.*, 2017:2-3). Poon (1993) was the first researcher to investigate tourism competitiveness specifically. Several authors such as Crouch and Ritchie (1999), Dwyer and Kim (2003), Dwyer *et al.* (2004), Enright and Newton (2004), Heath (2003), Kozak (2002), Ritchie and Crouch (2003) and Vengesai (2003) then developed definitions of competitiveness after 1993, specifically applicable to the tourism industry, which is referred to as tourism competitiveness, destination competitiveness or tourism destination competitiveness. This generates even more confusion, seeing that within the tourism industry, definitions of competitiveness are divided further into these three categories.

Tourism competitiveness is achieved by adopting suitable competitive strategies through market research which defines the target market and improves the interpretations of tourists' movements in and around the destinations (Pansiri, 2014:218). When tourism competitiveness is applied to a destination it is referred to the destination's capability to improve its appeal for its residents and tourists to provide tourism services of high quality to the tourists/consumers that will ensure the efficient sustainable use of tourism resources (Dupeyras & MacCallum, 2013:7).

Therefore tourism competitiveness, in literature, refers to the destination as a whole (Croes, 2010:6). Tsai *et al.* (2009:524) explain that a destination is competitive if it manages to draw tourists to the specific destination and simultaneously satisfies them. Ritchie and Crouch (2003:2) maintain that a tourism destination is competitive if it can upsurge or increase the total tourism expenditure as well as the tourists and at the same time satisfy their needs in a profitable manner to improve the well-being of the destination and its residents for future generations. Hence, it can be concluded that tourism destination competitiveness is then a combination of these explanations, meaning it is destination competitiveness specifically within the tourism industry. Croes (2010:218) adds that there is an underlying relationship between the performance of the destination and competitiveness. Therefore, within the tourism industry, competitiveness is characterised as a critical element for tourism destinations to obtain success (Goffi, 2013:121); thus it is important to establish a definition thereof.

Table 2.1 illustrates the variety of opinions regarding the definition of competitiveness and that no predominant definition of the concept exists (Crouch & Ritchie, 1999:140). The definitions of competitiveness provided in Table 2.1 are implemented in different industries and are indicated as such. These definitions below are linked to sustainability seeing that competitiveness is not entirely possible without it (Crouch & Ritchie, 1999:150).

Table 2.1: Definitions of competitiveness

Author	Year	Definition	Industry
Scott & Lodge	1985:3	"A country's ability to create, produce, distribute and/or service products in international economy, while rising returns on its sources."	Production
Coyne	1986:55	"A company is competitive if it manages to sell goods or services at a profit and clients choose to buy from them instead of competition that could"	Production
Newall	1992:1	"Competitiveness is about producing more and better-quality goods and services that are marketed successfully to consumers at home and abroad."	Production
Organisation for Economic Co-operation And Development (OECD)	1992:237	"The degree to which a country can, under free and fair market conditions, produce goods and services which meet the test of international markets, while simultaneously maintaining and expanding the real incomes of its people over the longer term."	Production
Porter & van der Linde	1995:97	"Competitiveness at industry level arises from superior productivity, either in terms of lower costs than rivals or the ability to offer products with superior values that justifies premium price."	Production
Waheeduzzman & Ryans	1996:7	"The degree to which a nation can produce goods and services that meet the test of international markets while simultaneously maintaining or expanding the real incomes of its citizens."	Production
Crouch & Ritchie	1999:137	"Competitiveness is the ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations"	Tourism
d'Hartserre	2000:23	"The ability of a destination to maintain its market position and share and/or to improve upon them through time."	Tourism
Hassan	2000:239	"Competitiveness is defined here as the destination's ability to create and integrate value added products that sustain its resources while maintaining market position relative to competitors."	Tourism
Dwyer, Forsyth & Rao	2002:328	"Competitiveness is a general concept that encompasses price differentials coupled with exchange rate movements, productivity levels of various components of the tourist industry and qualitative factors affecting the attractiveness or otherwise of a destination."	Tourism
Heath	2002:335	"Destination competitiveness appears to be linked to the ability of a destination to deliver goods and services that perform better than other destinations on those aspects of the tourism experience considered to be important by tourists."	Tourism
Dwyer & Kim	2003:369	"To achieve competitive advantage for its tourism industry, any destination must ensure that its overall 'appeal', and the tourist experience offered, must be superior to that of the alternative destinations open to potential visitors."	Tourism
Vengesai	2003:639	"Destination competitiveness could be associated with the ability to deliver an experience that is more satisfying than that offered by other destinations."	Tourism

Author	Year	Definition	Industry
Ritchie & Crouch	2003:2	"What makes a tourism destination truly competitive is its ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations."	Tourism
Enright & Newton	2004:778	"A destination is competitive if it can attract and satisfy potential tourists and this competitiveness is determined both by tourism-specific factors and by a much wider range of factors that influence the tourism service providers."	Tourism
Siggel	2006:138	"When costs are measured in terms of (possibly distorted) market prices, we deal with competitive advantage, which is the same as cost competitiveness."	Production
Hong	2008:6	"The competitive position (with high profits and constant growth) of the tourism industry of a nation relative to the global market of tourist industries in other nations, whether developed or developing countries, which therefore increases the real income and standard of living of its citizens."	Tourism
Navickas & Malakauskaite	2009:39	"The competitiveness of tourism sector and tourist destinations depends on juridical, political, economic, social, cultural, ecological, and technological environment."	Tourism
Oxford dictionary	2010:293	"Used to describe a situation in which people or organisations compete against each other." "As good as or better than others."	Production
Schwab	2017:4	"We define competitiveness as the set of institutions, policies, and factors that determine the level of productivity of an economy."	Production

Source: Author's own compilation

By being knowledgeable of the research that has already been conducted, future and further research on competitiveness can move forward and develop in order to fill the gaps, such as finding a universal definition, or destination-specific factors and models. Table 2.1 summarises some definitions from the various studies conducted regarding competitiveness and are seen as neither entirely true nor false as well as provides a background regarding what different authors' views are concerning this concept and how many different opinions exist.

As seen in Table 2.1 the definitions differ and each author has his or her own opinion of what competitiveness entails and what it means to be competitive as well as what makes a country or destination competitive. Where Porter (1990:75) simply states from a production side (firm-level) that competitiveness means obtaining an advantage over other nations by being innovative, Crouch and Ritchie (1999:150) adds to this definition by saying that competitiveness is about satisfying the tourists and ensuring sustainability of the tourists visiting the area, from the tourism industry side. Within the tourism industry, it is impossible to just follow Porter's (1990) definition and expect to improve the destination's competitiveness. Therefore, it is important to take into consideration what other authors state on the topic. Heath (2002:335) mentions that competitiveness is to deliver goods or services that function better than competition or destinations that deliver similar products or services. If one follows Dwyer and Kim's (2003:369) definition of competitiveness, the destination then obtains a competitive advantage when its

“overall appeal” and tourist experience is more satisfying than that of substitute destinations. Enright and Newton (2004:786) state that a destination is competitive if it can provide satisfaction of tourists and can make them interested in the specific destination. These authors each mention something different which contributes to competitiveness at a destination, but the main definition which is used in this study and provides an overall idea of competitiveness is the definition of Ritchie and Crouch (2003). Therefore one can conclude that competitiveness occurs when a destination can continuously attract tourists to a destination whilst providing them with a memorable experience in a profitable way, but at the same time ensuring the well-being of the residence and maintaining the destination’s capital for future generations (Ritchie & Crouch, 2003:2).

Due to the differences of opinion in Table 2.1, the gap for a universally used definition exists, seeing that the authors mentioned in Table 2.1 provided different definitions. Based on Table 2.1 the following themes regarding a variety of definitions of *competitiveness* were determined:

- Competitiveness involves being superior to competition by offering improved goods and services as well as memorable experiences
- Contains certain price aspects
- Obtains a profit
- Increasingly attracts new tourists
- At the same time uses resources sustainably and sees to the well-being of the local community
- Competitiveness is also determined by certain factors or aspects

There is, however, one aspect the majority of the definitions indicate which is: competitiveness involves competitors and therefore one should strive to be “better” than the competition in order to obtain a competitive advantage (Vengesayi, 2003:639). Obtaining a competitive advantage will mean that the destination will continuously attract new tourists and influence these tourists to prefer the one destination to the other. Confusion will continue to exist with regard to what it truly means if a destination is referred to as being competitive, but in this study the definition of Ritchie & Crouch (2003) describes it well. It is of paramount importance to gain knowledge of what researchers have already published regarding the concept so as to remain or become competitive. The inconsistency of the different views of competitiveness and the failure thereof to be universally accepted is not the only problem being addressed by this study.

Once a destination has addressed this issue with regard to whether or not it is competitive, according to the definitions provided above, it must continue to establish whether the destination has a competitive advantage or a comparative advantage. The difference between the two concepts is, however, not recognised by all scholars (Zhang & Jensen, 2014:1). The following section will deal with this issue, which will assist destinations in understanding whether they should focus on improving their competitive aspects or comparative aspects.

2.3.2 Comparison between competitiveness and comparative advantage

Ritchie and Crouch (2003:20) point out that literature has not yet clearly differentiated between the concepts *competitiveness* and *comparative advantage*. Therefore, there is disagreement as to what comparative advantage really means and whether any difference whatsoever exists between these two concepts (Siggel, 2007:2). Zhang and Jensen (2015:1) proclaim competitiveness and a comparative advantage to be different concepts. A comparative advantage of a destination usually involves the aspects provided by nature or natural resources (Ritchie & Crouch, 2003:22; Zhang & Jensen, 2015:1). Dwyer and Kim (2003:372) refer to a comparative advantage as being related to inherited resources such as “climate, scenery, flora and fauna” and the competitive advantages of destination refers to “created advantages” such as events and infrastructure.

Kılıç (2002:3) adds that obtaining a comparative advantage involves one destination being more efficient in terms of the production of goods and services than another destination. It is clear from Bento’s (2014) study that some destinations have the ability to provide a certain product or service, similar to another destination, but at a lower cost and this is due to the comparative advantage of the destination (Zhang & Jensen, 2005:4; Harmarneh, 2015:84).

Thus, meaning that a destination that has the ability to maintain a comparative advantage is classified as “better off” at providing these products or services than similar destinations (Bento, 2014:201). Comparative advantage is therefore characterised as an essential element of international production (Neary, 2003:1) which is stated in a firm-level context, but is also applicable to the tourism industry.

Seeing that this study focuses specifically on the tourism industry, a summary of theories concentrating on obtaining a comparative advantage within tourism was used in order to provide clarity. Different theories exist explaining why some countries have a comparative advantage over others (Zhang & Jensen, 2005:4). Table 2.2 indicates the theories as set out by Zhang and Jensen (2005:4) which provide examples of how one destination can possibly obtain a comparative advantage over others.

Table 2.2: Trade theories and their application to tourism

Trade theory	Main explanation for trade	Tourism example
Linder	Preferences (similarity)	Cultural affinity, such as pilgrim tourism
Ricardian theory	Technology/productive efficiency	Price competition among tourism destination countries
H-O theory (Heckscher-Ohlin Theory)	Natural endowments (capital, labour, land)	Sun, sand, sea and cultural heritage
Multinational firms	Ownership advantages (firm-specific technology)	International hotel chains
Neo-technology	Innovation/diffusion patterns	Adventure parks, internet marketing for tourism
Agglomeration	Externalities, infrastructure, chance	Tourism clusters, investment in tourism infrastructure

Source: Zhang and Jensen (2005:6)

Table 2.2 indicates the theories that could possibly provide a country with a comparative advantage. The last column of Table 2.2 indicates that the applications of these six theories within the tourism industry, as indicated by Zhang and Jensen (2005:5), contribute to a comparative advantage of a destination. For

example, the H-O theory signifies that natural endowments provide an advantage over other destinations such as one destination’s beaches, weather or cultural heritage could mean it contains a comparative advantage over other destinations. The Ricardian theory, on the other hand, is more commonly used to demonstrate the comparative advantage principle (Golub & Hsieh, 2000:221; Siggel, 2007:2) and involves the price difference of a destination with regard to expensive and cheaper rates. These are the two most used theories when dealing with comparative advantage (Jackman, Lorde, Lowe & Alleyne, 2011:3-4).

Linder’s hypothesis (Linder, 1961) clearly states that the demand of the locals within a country could improve the comparative advantage (du Toit *et al.*, 2010:11). These theories can be utilised by tourism destinations to enhance their awareness of which aspects equal a comparative advantage and to solve the problem regarding the confusion between a competitive and a comparative advantage.

Lanza and Pigliaru (2000:12) add that, within the tourism industry, a comparative advantage is dependent on how large or small the natural resources of the destination are in relation to for example its population size or the potential tourism development which is followed by a “rich biodiversity” (Freytag & Vietze, 2009:24).

It is clear from this discussion that there is indeed a difference between competitive and a comparative advantage and in order to fully understand the difference between the two concepts, it is necessary to compare them with each other. Table 2.3 depicts the comparison of the two concepts which will assist in gaining an understanding of what exactly determines the difference between a destination being competitive or having a comparative advantage.

Table 2.3: Comparison of competitive and comparative advantage

Author and year	Competitiveness	Author and year	Comparative advantage
Dunmore, (1986:22)	“A statement about differences in market prices.”	Dunmore, (1986:24)	“Deals with whether an economic unit (person, region or nation) has an advantage in producing a particular good compared to the other goods that can be produced and compared to the trading opportunities that may be available.”
Coyne, (1986:85)	“A company is competitive if it manages to sell goods or services at a profit and clients choose to buy from them instead of competition that could.”	Bento, (2014:201)	“A country has a comparative advantage in producing a good if the opportunity cost of producing that good is lower in the country than it is in other countries.”
Heath (2002:335)	“Attractions, events, transport networks, government policy, the	Heath (2002:335)	“Inherited or endowed resources such as climate, scenery, flora and fauna” and

Author and year	Competitiveness	Author and year	Comparative advantage
	quality of management and skills of workers.”	du Plessis (2002:5)	“Comparative advantages that include; (climate, beautiful beaches, landscape, cultural attractiveness) of the country.”
Heath (2002:335)	Destination competitiveness appears to be linked to the ability of a destination to deliver goods and services that perform better than other destinations on those aspects of the tourism experience considered to be important by tourists.	Kılıc (2002:3)	“If a country or individual is relatively more efficient in the production of a good than another country or individual then we say that it has comparative advantage in production of that good.”
Dwyer & Kim (2003:372)	“Tourism infrastructure (hotels, attractions, transport network), festivals and events, the quality of management, skills of workers, government policy.”	Dwyer & Kim (2003:372)	“Inherited or endowed resources such as: Climate, scenery, flora, fauna.”
Navickas & Malakauskaite (2009:39)	“The competitiveness of tourism sector and tourist destinations depends on juridical, political, economic, social, cultural, ecological, and technological environment.”	Freytag & Vietse (2009:22)	“A rich biodiversity may provide a comparative advantage for tourism in the developing world.”
Zhang & Jensen (2014:1)	“Tourism competitiveness may have a multiplicity of sources, including the effectiveness of suppliers, the presence and qualities of infrastructure, the ability of a destination to deal with sustainability.”	Zhang & Jensen (2014:1)	“Comparative advantage of a destination usually involves the aspects provided by nature.”

Source: Author’s own compilation

In general, as seen in Table 2.3, a comparative advantage can refer to natural aspects or resources a destination possesses as well as the ability to provide these resources to tourists at a lower price than their competition. Added to this, Table 2.3 also indicates that a comparative advantage includes the ability to produce goods and services effectively. Dwyer and Kim (2003:372) state that a destination that has a competitive advantage over others are that which has attractions, hotels etc. superior to that of their competition, whereas a comparative advantage is concerned with more natural aspects a country possesses. The comparison provided by Heath (2002:335) confirms that a comparative advantage involves natural aspects which cannot be created by man, whereas competitiveness is an attraction or

event. In other words, in order for a destination to obtain a comparative advantage over others, it needs to have certain natural qualities, which influence tourists to rather visit the one destination than the other due to its natural “attractors” (Heath, 2002:338).

In the case of South Africa, Fourie (2009:1) states that African countries’ comparative advantage in travel service exports are prominent. Brand South Africa (2013) adds to this by pointing out that the country received a 30 out of 140 ranking for the natural environment’s quality, which is referred to as a comparative advantage over countries ranking lower than 30. South Africa’s natural environment is “inherited” (Dwyer & Kim, 2003:372), contributing to a comparative advantage.

It is essential to keep both competitive and comparative advantages into consideration while striving to improve a destination’s overall competitiveness (Heath, 2002:335). According to Crouch and Ritchie (1999:142), both these concepts are essential; therefore a model of destination competitiveness should include both competitive and comparative advantages. Croes (2010:13) concurs “the concept of comparative and competitive advantage has provided a theoretically sound basis for the models of destination competitiveness.”

2.3.3 Models of competitiveness

Tourism destination competitiveness is referred to as an important concept for a destination to obtain a favourable position in the world tourism market (Leung & Baloglu, 2013:137). To achieve this position, destinations should be aware of what it means to be competitive, by establishing a universal definition of competitiveness as well as gaining knowledge of the difference between competitive advantage and a comparative advantage. Once they have established this, destinations should determine the factors or aspects contributing to competitiveness. The understanding of these factors or aspects that enhance a destination’s competitiveness has captured the interest of various researchers (Tsai *et al.*, 2009:525). These factors or aspects include, amongst others, supporting factors and resources such as infrastructure, core resources which, for example, comprise natural resources, key factors/aspects including for example political stability (Dwyer & Kim, 2010:383; Ritchie & Crouch, 2003:63). Simply by observing these three studies, one can draw the conclusion that a variety of factors/aspects exist that contribute to competitiveness which then leads to the creation of models (Hong, 2008:76). These factors or aspects of tourism competitiveness will be discussed later.

Heath (2002:335) explains that the motivation for developing a model of competitiveness with the main focus on the tourism sector is based on the tourism offering “product.” In other words, destinations need to be aware of the type of product they are offering, seeing that the product is service intensive (Flagestad & Hope, 2001:457), meaning that it is intangible and different from other products (Dwyer & Kim, 2003:369). Nonetheless, the development of these models, especially in this service-intensive industry, provides clarity on how to improve destination competitiveness (Enright & Newton, 2004:787; Crouch, 2007:74). These models should not necessarily be used to make the final decision, but rather assist in the decision-making process (Ritchie & Crouch, 2003:62). Models within tourism destination competitiveness have been studied to determine certain crucial elements of this concept (Crouch & Ritchie, 1999; Kozak &

Rimmington, 1999; Dwyer & Kim, 2003; Enright & Newton, 2005) and allow tourism stakeholders to identify the destination's strengths and weaknesses (Harmarneh, 2015:82).

Even though a variety of Tourism Destination Competitiveness models have been established within the tourism industry by these authors, there is still no universal model (Balkyte & Tvaronavičienė, 2010:341; Dwyer & Kim, 2003:372). This is due to the complexity of competitiveness and the range of factors that play a role in a destination being competitive (Dwyer & Kim, 2003:372). The conceptual model of destination competitiveness by Ritchie and Crouch (2003:63) is the model most prominently used for measuring the competitiveness of destinations. Hence, to fully understand the impact of competitiveness models it is important to analyse the most prominent models described in literature. Table 2.4, on the next page, consists of tourism competitiveness models by different authors, the year it was established as well as a summary of the main elements of the models.

Table 2.4: Competitiveness models

Author who originally developed model	Year	Model	Elements (summary)
Porter	1980	Porter's 5-forces model	<ul style="list-style-type: none"> •Rivalry among Existing Firms •Potential Entrants •Buyers •Substitutes •Suppliers
Porter	1990	The Porter diamond, or the determinants of competitive advantage	<ul style="list-style-type: none"> •Firm strategy, structure and Rivalry •Factor conditions Related and supporting industries Demand conditions
Poon	1993	Poon's destination competitiveness model	<ul style="list-style-type: none"> •Put the environment first •Make tourism the lead sector •Strengthen distribution channels •Build a dynamic private sector •Destination competitiveness
Heath	2003	Towards a model for enhancing Africa's sustainable tourism competitiveness	<ul style="list-style-type: none"> •The foundations •The cement •Building blocks •The roof
Dwyer & Kim	2003	The Dwyer-Kim model of destination competitiveness	<ul style="list-style-type: none"> •Demand conditions •Resources •Situational conditions •Destination management •Socio-economic prosperity •Destination competitiveness
Ritchie & Crouch	2003	The Ritchie/Crouch model of destination competitiveness and sustainability	<ul style="list-style-type: none"> •Qualifying and amplifying determinants •Destination policy, planning and development •Destination management •Core resources and attractors •Supporting factors and resources
Inter-American Development Bank	2006	The WES approach	<ul style="list-style-type: none"> •Difference in competitive positions •Caribbean destinations

Source: Author's own compilation

These seven models listed in Table 2.4 will be discussed so as to generate a better understanding of what it means to be competitive as well as how to improve a destination's competitiveness by using models to move up on the competitiveness ladder. According to Assaker, Hallak, Vinzi and O'Connor (2014:27) one of the initial frameworks of destination competitiveness which originates from Crouch and Ritchie (1999) and Ritchie and Crouch (2003) is based on the work of Porter (1990). Although Porter's model was not developed for the tourism industry, tourism researchers used Porter's model as basis for developing their own tourism competitiveness models and therefore it will be discussed below before commencing with the discussion on the tourism competitiveness models.

2.3.3.1 Porter's 5-forces model

Michael Porter published the book *Competitive Strategy* in 1980, which included the introduction to the "five forces" and assisted in establishing the rules of competition (Porter, 1990:78). These five forces are described as "threats" presented by the company's competition, new competitors and alternative products (Dobbs, 2014:32). Porter (1990:78) adds that "the state of competition in an industry depends on five basic competitive forces". These forces are illustrated in Figure 2.2.

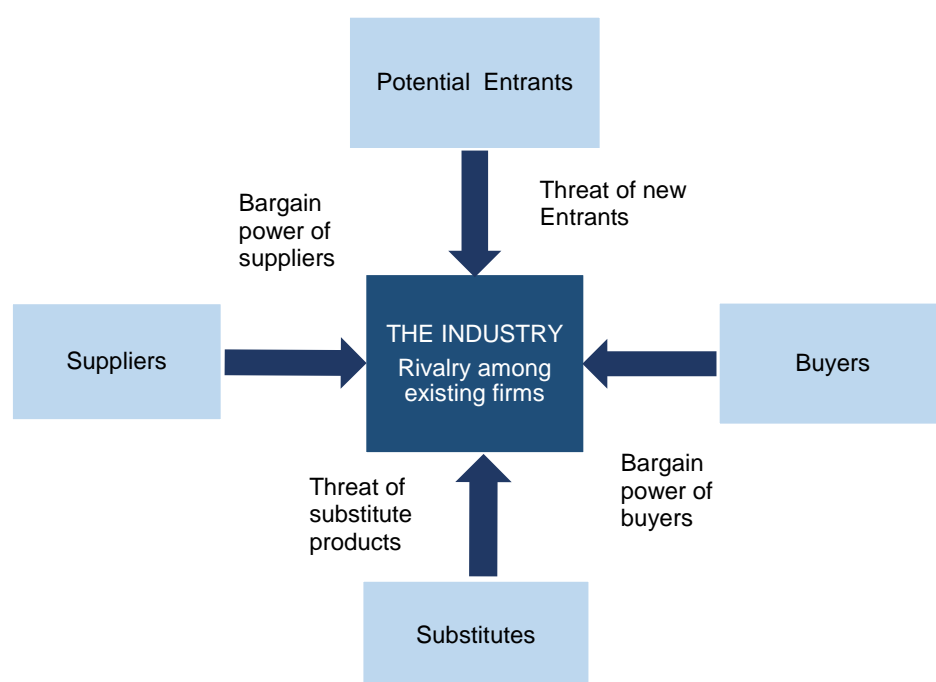


Figure 2.2: Porter's 5-forces model

Source: Porter (1980:31)

"All five competitive forces jointly determine the intensity of industry competition and profitability" (Porter, 1980:31), meaning that these forces utilised together could assist in improving the competitiveness of a destination. The 5-forces are referred to as: The Industry (Tourism Industry), the potential entrants (new competitors/tourism destinations), buyers (Tourists), substitutes (destinations offering similar products and services) and suppliers (Tour operators and car rental). These forces in Figure 2.2 could be applied to the tourism industry (Vanhove, 2006:101). Porter did not stop here; he continued by developing the diamond model in 1990, ten years after the 5-forces model was introduced.

2.3.3.2 The Porter diamond, or the determinants of competitive advantage

In 1990, Porter developed a model in his book, “The Competitive advantage of Nations”; which created awareness in the tourism industry (Vanhove, 2006:114). He simply stated that the answer to why particular destinations are more competent than others with regard to innovation, striving to achieve improved competitive advantages as well as being able to overcome certain barriers lies in the attributes of the Diamond model (Porter, 1990:76). The Diamond model is a supporting system, in other words, the attributes affect each other (Vanhove, 2006:114) and that all of the attributes should be considered before a competitive advantage is obtained. Figure 2.3 illustrates the Diamond model, indicating these attributes, which are needed to generate a better understanding of what it entails.

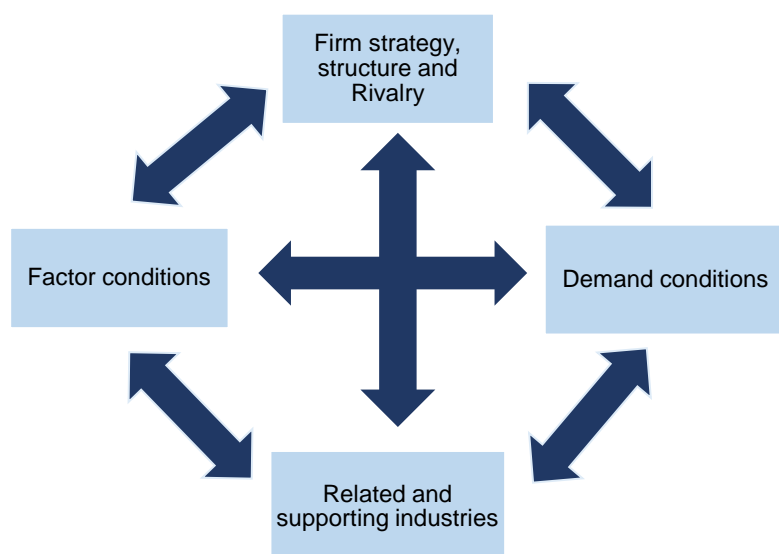


Figure 2.3: Determinants of National Competitive advantage

Source: Porter (1990:78)

The first attribute, as indicated in Figure 2.3, is Factor conditions which is arranged into five categories including: “Human Resources, Physical Resources, Knowledge Resources, Capital Resources as well as Infrastructure Resources” (Jhamb, 2016:142). Demand conditions comprise the organisation of the demand for the product or service, the size of it as well as the growth of domestic demand (Porter, 1990:78). Related and Supporting Industries involve the support of other and relating industries (Jhamb, 2016:142). The last attribute is the Firm strategy, structure and rivalry which influences the manner in which the firm is shaped, planned or organised and managed (Jhamb, 2016:142). These attributes can be applied within the tourism industry, similar to the following models.

2.3.3.3 Poon’s destination competitiveness model

Poon (1993) introduced competitive strategies applicable to the tourism industry, whereas Porter primarily focused on other sectors such as manufacturing (Vodeb, 2012:52). Her model indicates that a competitive destination should include certain key strategies to achieve destination competitiveness. These strategies include putting the environment first whilst considering competitiveness, making tourism the leading sector

in the economy, strengthening the distribution channels at the destination and building a vigorous private sector (Vodeb, 2012:57). Poon’s model of destination competitiveness is illustrated in Figure 2.5.

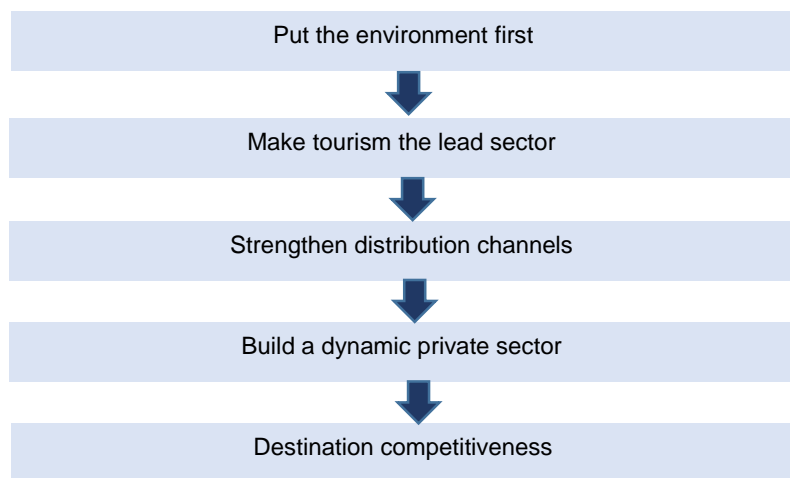


Figure 2.5: Poon’s model of destination competitiveness

Source: Poon (1993:293)

2.3.3.4 The WES approach

The WES approach is originally generated by the Inter-American Development Bank, which was used to analyse several countries in the Caribbean area where the differences in competitive positions of the destinations were explained to improve these positions (Vanhove, 2006:113). This model therefore focuses on the improvement of destinations in terms of the competitiveness thereof. Vanhove (2006:113) states that this model is particularly focussed on macro-economic factors such as the exchange rate and accessibility of capital. Figure 2.4 illustrates these economic factors by comparing one country’s currency with that of another which could contribute to its price competitiveness.

(Exchange rate currency X in currency units y).

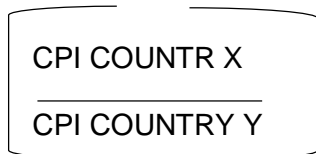


Figure 2.4: The WES approach model

Source: Vanhove (2006:123)

Competitiveness is defined here as to obtain the destination's objectives more efficiently than the international or national average, which means the destination should obtain higher profitability (Vanhove, 2006:123). The acronym used in Vanhove (2006:123) explains that this model works as follows: "the first term is equal to the US Dollars exchange rate in the currency of receiving country Y divided by the US Dollar exchange rate in the currency of generating country X."

2.3.3.5 Ritchie and Crouch's conceptual model of destination competitiveness

According to this conceptual model of destination competitiveness, created by Ritchie and Crouch (2003:63), a destination's success is determined by both comparative and competitive advantages (Vanhove, 2006:110). This model consists of the following aspects:

- **Comparative advantages:** These advantages as mentioned earlier are those that are natural and improved over time (Ritchie & Crouch, 2010:1052).
- **Competitive advantages:** Advantages which comprise resource capabilities such as maintenance and effectiveness (Ritchie & Crouch, 2010:1052). According to Vanhove (2006:111) these advantages are the activities that affect the overall goals of companies within the tourism industry.
- **Qualifying and amplifying determinants:** These are factors that "either moderate, modify, mitigate and filter or strengthen, enhance and augment the impact of all other factors" (Vanhove, 2006:111).
- **Destination policy, planning and development:** One of the two core concepts of this model (Vanhove, 2006:111). These include the vision of the destination with regard to improving its competitiveness, development, system definition and so forth.
- **Core Resources and attractors:** These contain elements such as the culture and history, special events and entertainment (Ritchie & Crouch, 2010:1054).
- **Supporting factors and resources:** Provides support in order for the tourism industry to be successful which includes, amongst others, infrastructure and the accessibility of the destination with regard to the economic or political situation of the destination (Ritchie & Crouch, 2010:1057). This conceptual model was created in 2003 and improved by Ritchie and Crouch (2010) who specially applied this model to a particular destination. This model is also characterised as the most inclusive model (Vanhove, 2006:110).



Figure 2.6: The Ritchie/Crouch Model of Destination Competitiveness and sustainability
Crouch (2003:36)

Source:
Ritchie and

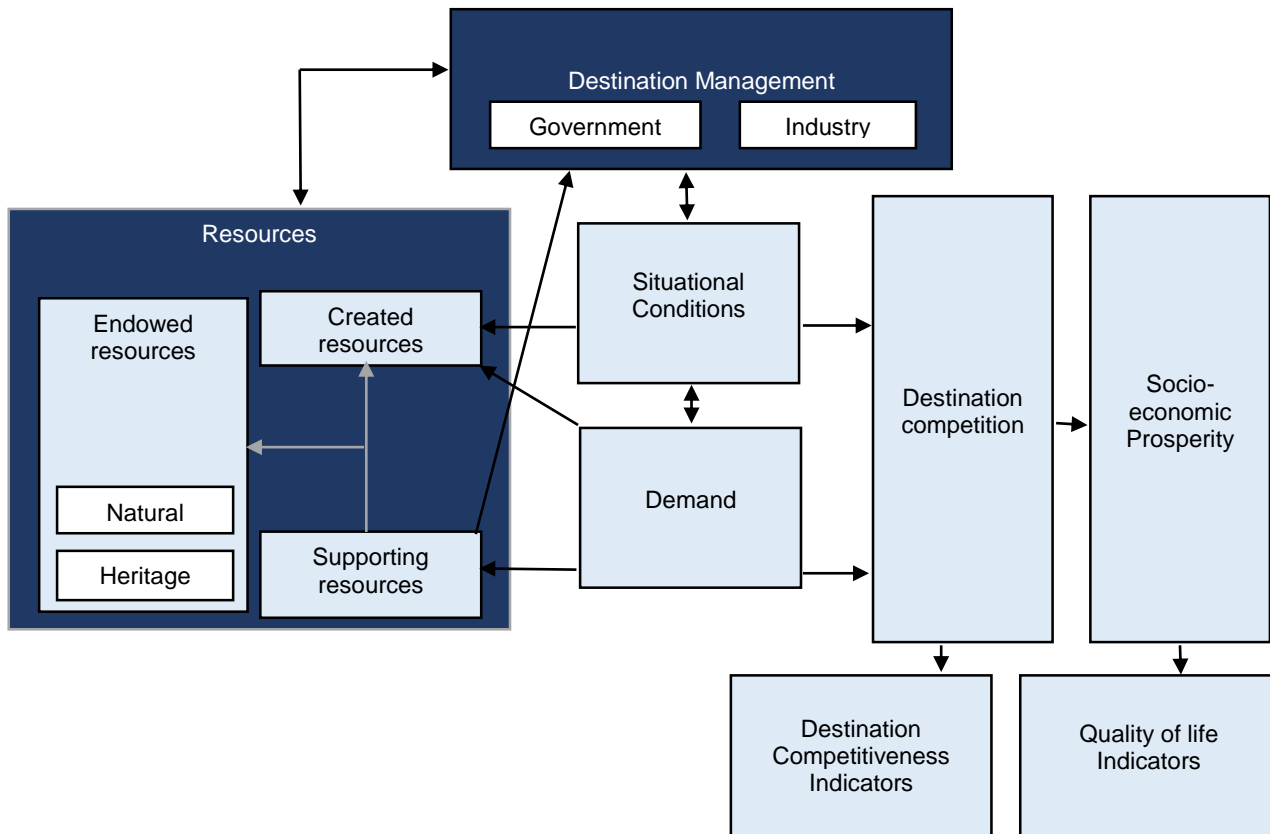
2.3.3.6 The Dwyer-Kim model of destination competitiveness

This model incorporates the key elements of national and firm competitiveness, proposed by other researchers mentioned in Table 2.4, but especially Ritchie and Crouch's model (Dwyer & Kim, 2003:376). These elements are illustrated in Figure 2.7.

According to this model, as seen in Figure 2.7, the resource category is divided in two sub groups, namely Endowed which means inherited (natural mountains) as well as Created (attractions, infrastructure) (Dwyer & Kim, 2003:372). Therefore, this model identifies both the comparative and the competitive advantages of a destination. This model also contains the following elements

- Resources: endowed vs. Created.
- Situational conditions (economic, social etc.): Conditions that the destination does not have control of (Dwyer & Kim, 2003:379).
- Destination management: activities by organisations such as destination marketing or management as well as policies of destinations (Ritchie & Crouch, 2000:5).
- Demand conditions: this includes- demand-awareness (generated by marketing), perception as well as preferences (Dwyer & Kim, 2003:379).
- Destination competitiveness: comprises of the "determinants" of competitiveness (Dwyer & Kim, 2002:380).
- Socio-economic prosperity: in other words, tourism competitiveness is in the element described as an objective to obtaining this prosperity (Dwyer & Kim, 2003:380).

All of these elements together strive to provide a destination with a competitive advantage.



Source: Dwyer and Kim (2003:378)
 Figure 2.7: The main elements of destination competitiveness

2.3.3.7 Heath’s model for enhancing Africa’s sustainable tourism competitiveness

The model illustrated in Figure 2.8 “brings together the main elements of destination competitiveness as proposed in the wider literature.” The model by Heath was developed to classify the strengths and weaknesses, which could be used to increase the number of tourists to Africa as well as other social, economic and environmental impacts (Heath, 2002:327). The model developed by Heath is based on the research conducted by Dwyer and Kim (2003).

This model, which is shaped like a house, consists of different facets (Heath, 2002:339):

- The foundations (Providing and managing the key attractors, Addressing the fundamental non-negotiable, providing the enablers, capitalising on the “value adders”, ensuring appropriate facilitators, focussing on the experience enhancers)
 - Providing and managing key attractors

The key attractors are the reasons why tourists choose one destination over another and are divided in two types inherited attractors and created attractors (Heath, 2002:338). Inherited attractors include natural attractors such as climate and culture and heritage attractors, which refers to history (Heath, 2002:338).

- Addressing the fundamental non-negotiables

The fundamentals of a destination include safety and security, political instability and quality of sanitation, which are elements that are important for a destination’s competitiveness (Heath, 2002:340).

- Providing enablers

The enablers of a destination contain the primary motivations for tourists to visit a destination and includes infrastructure such as roads, water supply and telecommunication (Heath, 2002:340).

- Capitalising on the value-adders

The value-adders of a destination include the destination's price competitiveness and providing value for money experiences (Heath, 2002:341).

- Ensuring appropriate facilitators

The facilitator foundation contains elements such as the food services, tour operators, travel agents and car rental firms at a destination, which could all influence the tourist's experience at a destination (Heath, 2002:341).

- Focussing on the experience enhancers

The tourism experience at a destination can be improved or enhanced by ensuring the hospitality at the destination and excellent services provided by tourism employees (Heath, 2002:342).

- The cement (includes the cement that binds the factors with one another)
- Building blocks (The implementing the plan in order to ensure that there is tourism in a destination)

The roof (This includes the key success drivers which is the shared vision and leadership, guiding values and principles and placing the strategic priority of the "people" factor)

This model therefor strives to provide clarity of how a continent such as Africa and the destinations within this continent can achieve a competitive advantage. It is clear from these models that different factors or aspects plays a role within competitiveness and specifically tourism competitiveness.

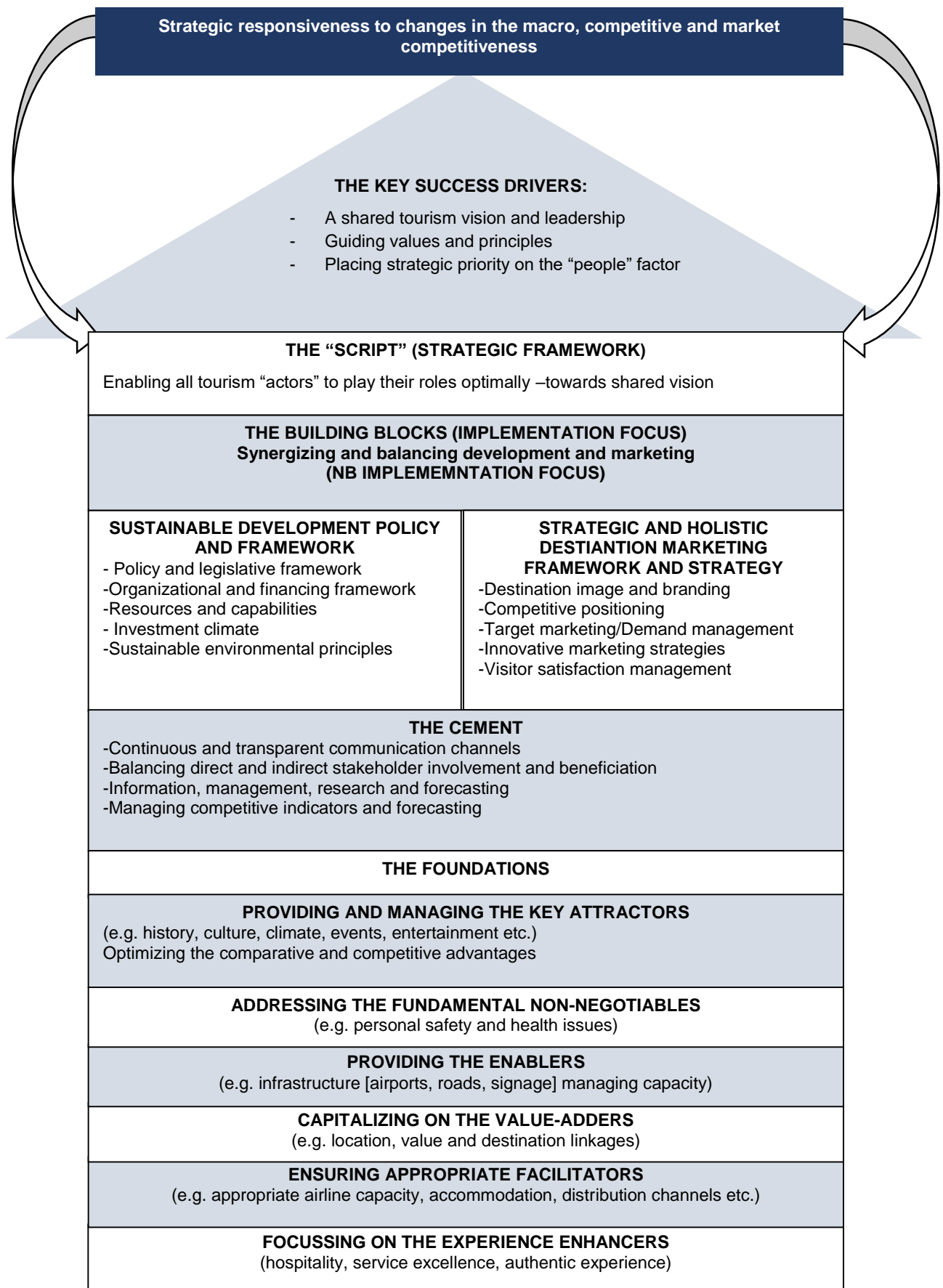


Figure 2.8: Towards a model for enhancing Africa's sustainable tourism competitiveness

Source: Heath (2002:339)

It is clear from these models that the authors of the abovementioned models have their own opinion as to what the competitiveness models of a destination are. Even though the models on tourism or destination competitiveness were based on Porter's models, the models within the tourism industry each have their own aspects or factors that are essential. What might work for one destination might not work for another one. Therefore, the different models cannot be applied universally, but are merely destination specific. Only Heath's model, mentioned in Table 2.4 focussed on the African context specifically. This could be further integrated by referring to aspects/factors of competitiveness. It is clear that the huge difference between Porter's models (first researcher to conduct research on competitiveness on firm-level) and Poon's model (first researcher to conduct research on tourism competitiveness), is that Porter's model focusses on other sectors and Poon's only on the tourism industry. This means that the aspects or factors of these models are more directly applicable to operations of the tourism industry or destination.

2.3.4 Factors/aspects of competitiveness

The classification or identification of tourism and destination competitiveness factors/aspects/determinants/indicators is a research problem, which is frequently investigated by several researchers (Navickas & Malakauskaite, 2009:37). According to Porter (1990:76) any business must have a strategy that strives to advance the strategy of the business, have knowledge of the structure and competition as well as the factors and supporting factors. The factors Porter is referring to are factor conditions, demand conditions, related or supporting industries and firm strategy, structure, and rivalry, which is discussed in detail in section 2.3.3. From the tourism perspective, there are certain internal and external factors contributing to the competitiveness of a destination (du Plessis *et al.*, 2015:2). External factors or attributes includes amongst others inflation, aging population, terrorism and political instability (Blanke & Chiesa, 2013:4). Blanke and Chiesa (2013:4) state that the internal factors include, amongst others, cultural resources, air transport infrastructure, tourism infrastructure and safety and security. In other words, the external factors are those that the destination has no direct control over and the internal factors the destination has more power to influence or change.

Research differs regarding the factors or aspects determining competitiveness. Hong (2008:40) divided these factors or aspects into different categories. These categories include comparative advantages, competitive advantages, tourism management, and environment conditions (Hong, 2008:66). Authors, Crouch and Ritchie (1999), Crouch and Ritchie (2000), Hassan (2000) and Hu and Ritchie (1993) researched comparative advantage which includes factors or aspects such as climate, scenery, landscape, minerals, history, music, paintings and special events. The competitive advantage category includes factors or aspects such as accommodation, transport systems, creative activities and economic growth, which was identified by authors such as Crouch and Ritchie (1999:148), Hassan (2000:239) and Poon (1993:236). The tourism management category comprises of, amongst others, tourism products or services development, management organisation, tourists information and tourism resources information (Buhalis, 2000; Crouch & Ritchie, 1999). Authors including Porter (1990), Crouch and Ritchie (1999:138) and Hassan (2000:240)

proclaim factors such as political climate changes, laws or regulations supporting or wars contributes to the competitiveness of tourism destinations.

Other authors such as Heath (2003), Ritchie and Crouch (2003), Enright and Newton (2005) and Dwyer and Kim (2010) each provided their own set of factors contributing to competitiveness. The factors of these mentioned authors include amongst others political stability, policies regarding Visa requirements, impact of events, routes to long-haul destinations and seat availability as well as natural and manmade factors (Heath, 2003:340). On the other hand, Ritchie and Crouch (2003:63) mentioned factors such as infrastructure, accessibility, facilitating resources, hospitality, special events, entertainment, quality of service, development, and branding. Enright and Newton (2005:341) add aspects, amongst others, architecture, history, events, museums and galleries, city nightlife, strong currency and steady prices and labour cost and skill. Authors Dwyer and Kim (2003:380) added aspects or factors such as natural resources, heritage and culture, tourism infrastructure, special events, shopping, accessibility, price competitiveness, location and hospitality. It is clear that these authors have certain factors or aspects which they agree on and others that differ significantly. There are however, other authors that also conducted research on tourism or destination competitiveness factors or aspects, but only the most prominent researcher's factors or aspects were used for the sake of this study. It is clear, according to the Travel & Tourism Competitiveness Index Ranking 2015 as presented by the World Economic Forum (2015), that certain aspects play a role in an endeavour to improve competitiveness. These aspects include, amongst others, South Africa's natural and cultural resources, positive business environment and the abundance of wildlife (World Economic Forum, 2015), which correlate with what is stated in literature. The aspects that were identified by the World Economic Forum (2015) are both competitive and comparative advantages, because it identifies inherited resources such as fauna and flora (Dwyer, 2003:372; Heath, 2002:335) as well as tourism infrastructure such as the business environment which is not something that is inherited by a destination (Dwyer, 2003:372).

Similar to aspects or factors of competitiveness, each destination contains certain strengths and weakness, which could influence tourists to visit the destination. Strengths are referred to as the internal positive aspects of a destination, which could assist in improving the competitive position of that destination (Goranczewski & Puciato, 2010:49). On the other hand, weaknesses could delay development of a destination, which could lead to certain threats in the destination (Goranczewski & Puciato, 2010:49). It is important for destinations to have knowledge of its strengths and weaknesses in order to know which areas to improve on to have a competitive advantage over other destinations (Jetter & Chen, 2009:174). If a destination has no knowledge of what it's strong and weak points are, how can role players strive to improve the destination's weaknesses? Therefore, in this study it was needed to first identify which of the competitiveness aspects the respondents indicate as strengths and which aspects are strengths of South Africa, before determining the competitiveness aspects of the destination.

2.4 Conclusion

Chapter two aimed to provide the reader with an understanding of the concept competitiveness, the difference between competitiveness and a comparative advantage as well as the models within the tourism industry. It is clear from this study that no prominent definition, model or factor/aspect of tourism competitiveness or fixed difference between competitive advantage and comparative advantage was used. However, competitiveness can be considered as businesses or destinations that aim to be superior to their competition by offering improved goods and services, memorable experiences, whilst obtaining a profit, increasingly attracting new tourists, using resources sustainably and sees to the well-being of the local community. The difference between a competitive and comparative advantage is a comparative advantage involves natural aspects which are presented at a lower cost than competition, whereas competitiveness is an attraction or event produced at a lower cost. The tourism competitiveness model most frequently used is, Ritchie and Crouch's (2003) conceptual model of destination competitiveness. The competitiveness factors or aspects that were discussed in this chapter primarily focussed on the supply side, which highlights the need to focus more on the demand side as this study will do. To support Chapter 2 a second literature chapter was developed to review the previous studies on Tourism or destination competitiveness, which can be seen from a supply, demand, or mixed viewpoint. This is discussed in Chapter 3.

CHAPTER 3: A REVIEW OF TOURISM AND DESTINATION COMPETITIVENESS

3.1 Introduction

Based on the literature portrayed in chapter 2 there are a variety of definitions, models, factors or aspects as well as differences between competitiveness and a comparative advantage within tourism and destination competitiveness literature. Due to the comprehensive and diverse research done on this topic the need exists to conduct a content analysis on tourism and destination competitiveness to fully understand the research topic and the research conducted within the tourism industry. This will enable future researchers to build on the current research on competitiveness or to solve the problem of the diversity of research on the topic. Therefore, this chapter then aims to conduct a comprehensive literature review and analysis which will be based on previous research studies done on the competitiveness of destinations within the tourism industry.

This chapter will therefore create an enhanced understanding of the following categories: number of articles, period when articles were published as well as the research focus of the articles, for example whether it focussed on models, factors and demand or supply approaches where tourism and destination competitiveness is applied within literature. The information obtained from these categories will provide the gaps within literature where more research needs to be conducted. Other authors state that the importance of a review is that it distinguishes between research that has already been conducted and research that still needs to be conducted (Hart, 1998:1; Marais, 2016:53), it enables theory development (Webster & Watson, 2002:xiii) and it summarises existing content (Seuring & Müller, 2008:1700).

With that being said, as a researcher it was difficult to obtain an overall view of literature on tourism and destination competitiveness; therefore the purpose of this chapter was to conduct a literature review and analysis on tourism and destination competitiveness to clarify what has already been published on competitiveness within the tourism industry.

3.2 Empirical literature analysis

Given the fact that this is a literature review, literature needed to be obtained by conducting a literature study in order to find articles on Competitiveness (tourism and destination competitiveness) within the tourism industry, accessible from the African continent. The journals, in which the articles were published, were obtained by using certain databases such as: Google scholar, EbscoHost, Sage journals online and ScienceDirect. In order to conduct this literature, certain key words such as: “competitiveness”, “tourism competitiveness”, “destination competitiveness”, “Tourism comparative advantage”, “competitiveness factors” or “competitive advantage” were used. The articles needed to comply with the set criteria in order to be included in the sample articles. The criteria was that only articles were used for the review and that the above mentioned key words needed to appear in the title or the focus of the journal article for it to be used within this review article and be relevant to the tourism industry. These articles also needed to contain information regarding the approach used to conduct the research, research focus and research topics of

the articles. The articles that met this criterion were evaluated according to seven main categories, see section 3.3. Articles with limited access or that were irrelevant to the study were not used. However, a few challenges were encountered when attempting to obtain some of the articles such as the fact that not all articles were accessible in South Africa. The complete article used in this chapter (Table 3.1) was analysed. . A total of one hundred and twenty-one (121) articles on tourism and destination competitiveness were analysed. Publications within tourism-related journals such as *Tourism Management*, *Journal of Travel Research*, published between 1997 and 2018 were utilised. The articles, displayed in Table 3.1, were obtained to observe the previous studies conducted on tourism competitiveness, which will be examined in the results.

3.3 Literature review

These results were depicted with regard to: 1) analysis according to articles published in academic journals; 2) timeframe of the published articles that focus on tourism competitiveness; 3) journal articles on tourism competitiveness according to the continent of the case study; 4) journal articles conducted on tourism competitiveness from a demand or supply approach; 5) journal articles distributed regarding research focus; 6) research topics of the articles; 7) review of tourism competitiveness factors or aspects. These specific categories were chosen because it complies with the purpose of this review and analysis. By having knowledge of which journals competitiveness research was published in, when these articles were published and the continents the case study articles were based on, provides the gaps and opportunity of where in the world and in which journals future competitiveness research should be conducted. The other categories such as the approach used for the research, the research focus and topics as well as the different competitiveness factors or aspects indicates what within competitiveness needs to be researched more thoroughly and what is already being investigated the most. The results of the literature review follow after Table 3.1, which is compiled founded on seven categories as mentioned above. The table is arranged from oldest to newest. If a section in Table 3.1 did not contain any description under it, it simply means that the particular article did not contain that information.

Table 3.1: Articles of tourism and destination competitiveness used for the sample of the review

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
de Holan, P.M. & Phillips, N.	1997	Sun, sand, and hard currency: tourism in Cuba	Annals of tourism research	Cuba	Supply	Competitiveness strategy	Tourism competitiveness
Keane, M.J.	1997	Quality and pricing in tourism destinations	Journal of tourism research	-	Supply	Model	Tourism competitiveness
Kozak, M. & Rimmington, M.	1999	Measuring tourist destination competitiveness: conceptual considerations and empirical findings	International journal of hospitality management	Turkey	Demand	Competition between destinations	Destination competitiveness
Crouch, G.I. & Ritchie, J.B.	1999	Tourism, competitiveness, and societal prosperity	Journal of business research	-	Supply	Factors & models	Tourism destination competitiveness
Botha, C., Crompton, J.L. & Kim, S.S.	1999	Developing a revised competitive position for Sun/Lost city, South Africa	Journal of travel research	South Africa	Supply	Model	Tourism competitiveness
Faulkner, B., Oppermann, M. & Fredline, E.	1999	Destination competitiveness: an exploratory examination of South Australia's core attractions	Journal of vacation marketing	Australia	Supply	Destination attractiveness	Destination competitiveness
Hassan, S.S.	2000	Determinants of market competitiveness in an environmentally sustainable tourism industry	Journal of travel research	-	Supply	Models & determinants (Market orientated)	Destination competitiveness
Go, F.M. & Govers, R.	2000	Integrated quality management for tourist destinations: a European perspective on achieving competitiveness	Tourism management	Europe	Supply	Integrated quality management	Destination competitiveness
Ritchie, J.B. & Crouch, G.I.	2000	The competitive destination: a sustainability perspective	Tourism management	Different countries	Supply	Model	Destination competitiveness
Mihalič, T.	2000	Environmental management of a tourist destination: a factor of tourism competitiveness	Tourism management	-	Supply	Factors	Tourism competitiveness
D'Hautesserre, A.M.	2000	Lessons in managed destination competitiveness:	Tourism management	North-America	Supply	Case study	Destination competitiveness

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
		the case of Foxwoods Casino Resort					
Dwyer, L., Forsyth, P. & Rao, P.	2000	The price competitiveness of travel and tourism: a comparison of 19 destinations	Tourism management	Australia	Supply	Comparison of prices of different countries	Price competitiveness
Dwyer, L., Mistilis, N., Forsyth, P. & Rao, P.	2001	International price competitiveness of Australia's MICE industry. International	Journal of tourism research	Australia	Supply	MICE	Price competitiveness
Dwyer, L., Forsyth, P. & Rao, P.	2002	Destination price competitiveness: exchange rate changes versus domestic inflation.	Journal of travel research	Australia	Supply	Price competitiveness indices	Price competitiveness
Heath, E.	2002	Towards a model to enhance Africa's sustainable tourism competitiveness: a South African perspective'	Journal of public administration	Africa	Supply	Models & factors	Tourism competitiveness
Saayman, M. & du Plessis, E.	2003	Competitiveness of South Africa as a tourist destination	South African journal for research in sport, physical education & recreation	South Africa	Supply	Factors	Destination competitiveness
Dwyer, L. & Kim, C.	2003	Destination Competitiveness: determinants and Indicators	Current issues in tourism	-	Supply	Models	Destination competitiveness
Melian-Gonzalez, A. & Garcia-Falcon, J.M.	2003	Competitive potential of tourism in destinations	Annals of tourism research	Spain	Demand	Evaluating competitiveness	Destination competitiveness
Heath, E.	2003	Towards a model to enhance destination competitiveness: a Southern African perspective	Riding the wave of tourism & hospitality research	South Africa	Supply	Models	Destination competitiveness
Huybers, T. & Bennett, J.	2003	Environmental management and the competitiveness of nature-based tourism destinations	Environmental & resource economics	Australia	Supply	Nature based destination competitiveness	Destination competitiveness
Enright, M.J. & Newton, J.	2004	Tourism destination competitiveness: a quantitative approach	Tourism management	Hong Kong	Demand	Models	Tourism destination competitiveness

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
Jonker, J.A., Heath, E.T. & du Toit, C.M.	2004	The identification of management-process critical success factors that will achieve competitiveness and sustainable growth for South Africa as a tourism destination	Southern African business review	South Africa	Supply	Models	Destination competitiveness
Hudson, S., Ritchie, J.R.B. & Timur, S.	2004	Measuring destination competitiveness: an empirical study of Canadian ski resorts	Journal of tourism planning & development	Canada	Supply	Models & factors	Destination competitiveness
Dwyer, L., Mellor, R., Livaic, Z., Edwards, D. & Kim, C.	2004	Attributes of destination competitiveness: a factor analysis	Tourism analysis	Korea and Australia	Demand	Models, indicators & factors	Destination competitiveness
Gooroochurn, N. & Sugiyarto, G.	2005	Competitiveness indicators in the travel and tourism industry	Tourism economics	Over 200 countries	Supply	Indicators	Destination competitiveness
Enright, M.J. & Newton, J.	2005	Determinants of tourism competitiveness in Asia Pacific: comprehensive-ness and universality	Journal of travel research	Asia	Supply	Factors	Destination competitiveness
Omerzel, D.G.	2006	Competitiveness of Slovenia as a tourist destination	Managing global transitions	-	Supply	Models	Destination competitiveness
Siggel, E.	2006	International competitiveness and comparative advantage: a survey and a proposal for measurement	Journal of industry, competition & trade,	-	Supply	Comparative advantage	Tourism competitiveness
Seyoum, B.	2007	Revealed comparative advantage and competitiveness in services: a study with special emphasis on developing countries	Journal of economic studies	Developing countries	Supply	Competitiveness vs. comparative advantage	Tourism competitiveness
Bahar, O. & Kozak, M.	2007	Advancing destination competitiveness research: comparison between tourists and service providers	Journal of travel & tourism marketing	Turkey	Demand and Supply	Factors	Destination competitiveness

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
Mazanec, J.A., Wöber, K. & Zins, A.H.	2007	Tourism destination competitiveness: from definition to explanation?	Journal of travel research	Different countries	Supply	Models	Destination competitiveness
Claver-Cortés, E., Molina-Azorí, J.F. & Pereira-Moliner, J.	2007	Competitiveness in mass tourism	Annals of tourism research	Spain	Supply	Mass tourism destinations	Tourism competitiveness
Zhang, J. & Jensen, C.	2007	Comparative advantage: explaining tourism flows	Annals of tourism research	-	Supply	Comparative advantage	Tourism competitiveness
Dwyer, R.J.	2007	Utilizing simple rules to enhance performance measurement competitiveness and accountability growth	Business strategy series	-	Supply	Competitive strategy	Productive
Garau-Taberner, J.	2007	Measuring destination competitiveness: an exploratory study of the Canaries, Mainland Spain, France, the Balearics and Italy	Tourism today	Medi- terranean	Demand	Review of competitiveness factors	Destination competitiveness
Shi, C., Zhang, J., Yang, Y. & Zhou, Z.	2007	Shift-share analysis on international tourism competitiveness: a case of Jiangsu province	Chinese geographical science	China	Supply	Comparative vs. Competitive advantage	international tourism competitiveness
Cracolici, M.F., Nijkamp, P. & Rietveld, P.	2008	Assessment of tourism competitiveness by analysing destination efficiency	Tourism economics	Italy	Supply	Models	Tourism destination competitiveness
Miller, M. M., Henthorne, T. L. & George, B. P.	2008	The competitiveness of the Cuban tourism industry in the twenty-first century: a strategic re-evaluation	Journal of travel research	Cuba	Supply	Tourism position	Destination competitiveness
Gomezelj, D.O. & Mihalič, T.	2008	Destination competitiveness—Applying different models, the case of Slovenia	Tourism management	Slovenia	Supply	Models, indicators & factors	Destination competitiveness

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
Lagos, D. & Courtis, P.G.	2008	Business Clusters Formation as a means of improving competitiveness in the tourism sector	European research studies	-	Supply	Business clusters	Tourism competitiveness
Azzoni, C.R. & de Menezes, T.A.	2009	Cost competitiveness of international destinations	Annals of tourism research	-	Supply	Cost competitiveness	Price competitiveness
Eraqi, M.I.	2009	Integrated quality management and sustainability for enhancing the competitiveness of tourism in Egypt	International journal of services & operations management	Egypt	-	Integrated quality management (IQM)	Destination competitiveness
Dwyer, L., Edwards, D., Mistilis, N., Roman, C. & Scott, N.	2009	Destination and enterprise management for a tourism future	Tourism management	-	Supply	Drivers	Destination competitiveness
Navickas, V. & Malakauskaite, A.	2009	The possibilities for the identification and evaluation of tourism sector competitiveness factors	Engineering economics	-	Supply	Factors	Destination competitiveness
Tsai, H., Song, H. & Wong, K.K.	2009	Tourism and hotel competitiveness research	Journal of travel & tourism marketing	Hong Kong	Supply	Models & determinants	Tourism destination competitiveness
Balan, D., Balaure, V. & Veghes, C.	2009	Travel and tourism competitiveness of the world's top tourism destinations: an exploratory Assessment	Annales universitatis apulensis: aeries oeconomica	Top 25 tourist destinations	Supply	Models	Tourism destination competitiveness
Koc, E.	2009	A review of country tourism competitiveness research performance and overall country competitiveness: competitiveness review	An international business journal	-	Supply	Research performances	Tourism competitiveness
Mathew, V.	2009	Sustainable tourism: a case of destination competitiveness in South Asia	South Asian journal of tourism & heritage	Asia	Supply	Sustainable competitive tourism	Destination competitiveness
Botti, L.E.A., Peypoch, N., Robinot, E. & Solonadrasana, B.	2009	Tourism destination competitiveness: the French regions case	European journal of tourism research	France	Supply	Model (efficiency)	Destination competitiveness

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
Gursoy, D., Baloglu, S. & Chi, C.G.	2009	Destination competitiveness of Middle Eastern countries: an examination of relative positioning	Anatolia	Middle Eastern countries	Supply	Model & competitiveness indices	Tourism competitiveness
Hong, W.C.	2009	Global competitiveness measurement for the tourism sector.	Current issues in tourism	-	Supply	Indicators & factors	Tourism competitiveness
Lee, C.F. & King, B.	2009	A determination of destination competitiveness for Taiwan's hot springs tourism sector using the Delphi technique	Journal of vacation marketing	Taiwan	Supply	Factors	Tourism competitiveness
Kozak, M., Baloğlu, Ş. & Bahar, O.	2009	Measuring destination competitiveness: multiple destinations versus multiple nationalities	Journal of hospitality marketing & management,	Turkey	Demand	Factors	Destination competitiveness
Kunst, I.	2009	Tourist destination competitiveness assessment-approach and limitations	Acta turistica	-	Supply	Models	Destination competitiveness
Croes, R.R	2010	Testing the empirical link between tourism and competitiveness: evidence from Puerto Rico	Tourism economics	-	Supply	Models	Destination competitiveness
Ritchie, J.R.B & Crouch, G.I.	2010	A model of destination competitiveness/ sustainability: Brazilian perspectives	Rap — Rio de Janeiro	Brazil	Supply	Models	Destination competitiveness
Kayar, Ç.H. & Kozak, N.	2010	Measuring destination competitiveness: an application of the travel and tourism competitiveness index	Journal of hospitality, marketing and management	Turkey	Supply	Factors	Destination competitiveness
Das, J. & Dirienzo, C.	2010	Tourism competitiveness and corruption: a cross-country analysis	Tourism economics	Different countries	Supply	Corruption & competitiveness	Destination competitiveness
Barbosa, L.G.M., Oliveira, C.T.F.D. & Rezende, C.	2010	Competitiveness of tourist destinations: the study of 65 key destinations for the	Revista de administração pública	Brazil	Supply	Models	Tourism competitiveness

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
		development of regional tourism					
Croes, R. & Rivera, M.A.	2010	Testing the empirical link between tourism and competitiveness: evidence from Puerto Rico	Tourism economics	Puerto Rico	Supply	Tourist spending	Price competitiveness
Forsyth, P. & Dwyer, L.	2010	Exchange rate changes and the cost competitiveness of international airlines: the Aviation Trade Weighted Index	Research in transportation economics	Australia	Supply	Competitiveness of airlines	Price competitiveness
Crouch, G.I.	2011	Destination Competitiveness: an analysis of determinant attributes	Journal of travel research	Australia	Supply	Model & factors	Destination competitiveness
Zhang, H., Gu, C.L., Gu, L.W. & Zhang, Y.	2011	The evaluation of tourism destination competitiveness by TOPSIS & information entropy—A case in the Yangtze River Delta of China	Tourism management	China	Supply	Technique for order preference by similarity to ideal solution (TOPSIS)	Tourism destination competitiveness
du Plessis, L. & Saayman, M.E.	2011	Factors influencing pricing in the accommodation sector in south Africa	The Southern African journal of entrepreneurship and small business management	South Africa	Supply	Factors influencing pricing	Price competitiveness
Mazanec, J.A. & Ring, A.	2011	Tourism destination competitiveness: second thoughts on the World Economic Forum reports	Tourism economics	-	Supply	Partial least squares (PLS) models	Destination competitiveness
Jackman, M., Lorde, T., Lowe, S. & Alleyne, A.	2011	Evaluating tourism competitiveness of small island developing states: a revealed comparative advantage approach	Anatolia	Small island (Maldives)	Supply	Comparative advantage	Tourism competitiveness
Armenski, T., Marković, V., Davidović, N. & Jovanović, T.	2011	Integrated model of destination competitiveness	Geographica pannonica	Serbia	Supply	Model	Destination competitiveness

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
Shirazi, S.F.M. & Som, A.P.M.	2011	Destination management and relationship marketing: two major factors to achieve competitive advantage	Journal of relationship marketing	-	Not mentioned	Factors (review) & models	Destination competitiveness
Pavlic, I., Peruric, D. & Portolan, A.	2011	Tourists' satisfaction as an important tool for increasing tourism competitiveness in the globalization conditions: the case of Dubrovnik-Neretva County', International	Journal of management cases	Croatia (Dubrovnik-Neretva County.)	Demand	Tourist satisfaction	Destination competitiveness
Ribes, J.F.P., Rodríguez, A.R. & Jiménez, M.S.	2011	Determinants of the competitive advantage of residential tourism destinations in Spain	Tourism economics	Spain	Supply	Models & factors	Tourism competitiveness
Dwyer, L. & Forsyth, P.	2011	Methods of estimating destination price competitiveness: a case of horses for courses?	Current issues in tourism	Australia	Supply	Price competitiveness indicators	Price competitiveness
Fourie, J.	2011	Travel service exports as comparative advantage in South Africa	Journal of economics & management sciences	South Africa	Supply	Comparative advantage	Comparative advantage
Armenski, T., Gomezelj, D.O., Djurdjev, B.V., Čurčić, N. & Dragin, A.R.A.	2012	Tourism destination competitiveness: between two flags	Economic research	Slovenia and Serbia.	Demand	Models & indicators	Destination competitiveness
Vodeb, K.	2012	Competitiveness of frontier regions and tourism destination management	Managing global transitions	Slovenia and Croatia	Supply	Models	Destination competitiveness
Dimoska, T. & Trimcev, B.	2012	Competitiveness strategies for supporting economic development of the touristic destination	Procedia-social & behavioral sciences	-	Supply	Definitions & competitiveness strategy	Tourism competitiveness
Chen, Y.C. & Chen, Y.T.	2012	The advantage of green management for hotel competitiveness in Taiwan: in the viewpoint of senior hotel managers	Journal of management & sustainability	Taiwan	Demand	Green management	Hotel competitiveness

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
Dragičević, V., Jovičić, D., Blešić, I., Stankov, U. & Bošković, D.	2012	Business tourism destination competitiveness: a case of Vojvodina Province (Serbia)	Economic research- ekonomska istraživanja	Serbia	Supply	Model (business competitiveness)	Destination competitiveness
Hallmann, K., Müller, S., Feiler, S., Breuer, C. & Roth, R.	2012	Suppliers' perception of destination competitiveness in a winter sport resort	Tourism review	Switzerland	Supply	Factors	Destination competitiveness
Salman, A., & Hasim, M.S.	2012	Factors and competitiveness of Malaysia as a tourist destination: a study of outbound Middle East tourists'	Asian social science	Malaysia	Demand	Factors	Destination competitiveness
Caber, M., Albayrak, T. & Matzler, K.	2012	Classification of destination attributes in the context of competitiveness by revised importance analysis	Journal of vacation marketing	Turkey	Demand	Attributes, models & determinants	Destination competitiveness
Huang, J.H. & Peng, K.H.	2012	Fuzzy Rasch model in TOPSIS: a new approach for generating fuzzy numbers to assess the competitiveness of the tourism industries in Asian countries	Tourism management	Asia	Supply	Model	Destination competitiveness
Wang, C.Y., Hsu, M.K. & Swanson, S.R.	2012	Determinants of tourism destination competitiveness in China:	Journal of china tourism research	China	Supply	Factors & determinants	Destination competitiveness
Shaw, G., Saayman, M. & Saayman, A.	2012	Identifying risks facing the South African tourism industry	South African journal of economic & management sciences	South Africa	Supply	Risk factors	Price competitiveness
Goffi, G.	2013	A model of tourism destination competitiveness: the case of the Italian destinations of excellence	Anuario turismo y sociedad	Italy	Demand	Factors & models	Destination competitiveness

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
Ivanov, S. & Webster, C.	2013	Globalisation as a driver of destination competitiveness	Annals of tourism research	-	Supply	Globalisation	Destination competitiveness
Croes, R.R. & Kubickova, M.	2013	From potential to ability to compete: towards a performance-based tourism competitiveness index	Journal of destination marketing & management	-	Supply	Competitiveness index	Destination competitiveness
Andrades, L., Rivero, M.S. & Fernández, J.I.P.	2013	Differentiating competitiveness through tourism image assessment: an application to Andalusia (Spain)	Journal of travel research	Spain	Demand	Factors (review)	Destination competitiveness
Mulec, I. & Wise, N.	2013	Indicating the competitiveness of Serbia's Vojvodina region as an emerging tourism destination	Tourism management perspectives	Serbia	Supply	Indicators & models	Destination competitiveness
Leung, X.Y. & Baloglu, S.	2013	Tourism competitiveness of Asia Pacific destinations	Tourism analysis	Asia	Supply	Travel & tourism competitiveness index	Destination competitiveness
Botti, L. & Peypoch, N.	2013	Multi-criteria ELECTRE method and destination competitiveness	Tourism management perspectives	France	Supply	Multi-criteria decision analysis	Destination competitiveness
Pansiri, P.	2013	Tourist motives and destination competitiveness: a gap analysis perspective	International journal of hospitality & tourism administration	Botswana	Demand & Supply	Definition & factors	Destination competitiveness
Webster, C. & Ivanov, S.	2014	Transforming competitiveness into economic benefits: does tourism stimulate economic	Tourism management	-	Supply	Impact of competitiveness on tourism	Destination competitiveness

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
		growth in more competitive destinations?					
Mazurek, M.	2014	Competitiveness in tourism – models of tourism competitiveness and their applicability: case study Austria and Switzerland	European journal of tourism, hospitality & recreation	Austria & Switzerland	Supply	Model	Destination competitiveness
Andrades-Caldito, L., Sánchez-Rivero, M. & Pulido-Fernández, J.I.	2014	Tourism destination competitiveness from a demand point of view: an empirical analysis for Andalusia	Tourism analysis	Spain	Demand	Models	Tourism destination competitiveness
Santos, M.C. & Ferreira, A.M.	2014	Influential factors in the competitiveness of mature tourism destinations	Tourism & management studies	-	Supply	Factors	Tourism competitiveness
Assaker, G., Hallak, R., Vinzi, V.E. & O'Connor, P.	2014	An empirical operationalization of countries' destination competitiveness using partial least squares modelling	Journal of travel research	France	Supply	Determinants	Destination competitiveness
Maharaj, S. & Balkaran, R.A.	2014	Comparative analysis of the South African and global tourism competitiveness models with the aim of enhancing a sustainable model for South Africa	Journal of economics & behavioural studies	South Africa	Supply	Factors & models	Tourism competitiveness
du Plessis, E., Saayman, M. & van der Merwe, A.	2015	What makes South African tourism competitive?	African journal of hospitality, tourism & leisure	South Africa	Supply	Factors	Destination Competitiveness
Hamarneh, I.	2015	Competitiveness in tourism sector	Journal of tourism & services	Czech Republic	Supply	Definition, models & indicators	Tourism competitiveness
Jafari, J. & Xiao, H.	2015	Comparative advantage, tourism	Encyclopedia of tourism	Switzerland	Supply	Comparative advantage	Comparative advantage
Cibinskiene, A. &	2015	Evaluation of city tourism competitiveness	Procedia-social and behavioral sciences	-	Supply	Models &	Tourism competitiveness

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
Snieskiene, G.						factors	
Zehrer, A. & Hallmann, K.	2015.	A stakeholder perspective on policy indicators of destination competitiveness	Journal of destination marketing & management	Alpine destinations	Supply	Policy and planning factors	Destination competitiveness
Ovcharov, A.O. Vasiljeva, M.V. & Shirin, S.S.	2015	The Russian tourist industry: structure, trends, competitiveness at the world market	Review of european studies	Russia	Supply	Russian tourism	Destination competitiveness
Zhou, Y., Maumbe, K., Deng, J. & Selin, S.W.	2015	Resource-based destination competitiveness evaluation using a hybrid analytic hierarchy process (AHP): the case study of West Virginia	Tourism management perspectives	North- America	Demand & Supply	Factors	Tourism destination competitiveness
Berdo, S.	2016	The Complexity of tourist destination competitiveness concept through main competitiveness models	International journal of scientific & engineering	-	Supply	Models	Destination competitiveness
Knežević Cvelbar, L., Dwyer, L., Koman, M. & Mihalič, T.	2016	Drivers of destination competitiveness in tourism: a global Investigation	Journal of travel research	-	Supply	Factors	Destination competitiveness
Abreu-Novais, M., Ruhanen, L. & Arcodia, C.	2016	Destination competitiveness: what we know, what we know but shouldn't and what we don't know but should	Current issues in tourism	-	Supply	Definition, models & determinants	Destination competitiveness
Perles-Ribes, J.F., Ramón-Rodríguez, A.B., Rubia-Serrano, A. & Moreno-Izquierdo, L.	2016	Economic crisis and tourism competitiveness in Spain: permanent effects or transitory shocks?	Current issues in tourism	Spain	Supply	Definition & tourism market share	Destination competitiveness
Seetaram, N., Forsyth, P. & Dwyer, L.	2016	Measuring price elasticities of demand for outbound tourism using competitiveness indices	Annals of tourism research	Australia	Demand	Models	Price competitiveness
Vilić, S. &	2016	Quality as a basis for tourism destination competitiveness Banja Luka, Bosnia and	Sitcon	Bosnia (Europe)	Demand	Key attributes of the country	Destination competitiveness

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
Dujaković, T.		Herzegovina correspondence: tourist experience as the basis for destination competitiveness: a case study of Ohrid					
Cucculelli, M. & Goffi, G.	2016	Does sustainability enhance tourism destination competitiveness? evidence from Italian destinations of excellence	Journal of cleaner production	Italy	Supply	Model	Destination competitiveness
Hafiz Hanafiah, M, Hemdi, M.A. & Ahmad, I.	2016	Does tourism destination competitiveness lead to performance? A case of ASEAN region	Turizam: međunarodni znanstveno-stručni časopis,	Asia	Supply	Macro aspects of tourism destination competitiveness	Tourism destination competitiveness
Pulido-Fernández, J.I. & Rodríguez-Díaz, B.	2016	Reinterpreting the World Economic Forum's global tourism competitiveness index	Tourism management perspectives	-	Supply	Competitiveness index	Tourism competitiveness
du Plessis, E., Saayman, M. & van der Merwe, A.	2017	Explore changes in the aspects fundamental to the competitiveness of South Africa as a preferred tourist destination	South African journal of economic & management sciences	South Africa	Supply	Strengths and weaknesses of destination competitiveness factors	Destination competitiveness
Azzopardi, E. & Nash, R.	2017	A review of Crouch and Ritchie's, Heath's, and Dwyer and Kim's models of tourism competitiveness	Tourism analysis	-	Supply	Models	Tourism destination
Khan, S.A.R., Qianli, D., Songbo, W., Zaman, K. & Zhang, Y.	2017	Travel and tourism competitiveness index: the impact of air transportation, railways transportation, travel and transport services on international inbound and outbound tourism	Journal of air transport management	-	Supply	Drivers	Tourism competitiveness
Andrades, L. & Dimanche, F.	2017	Destination competitiveness and tourism development in Russia: issues and challenges	Tourism management	Russia	Supply	Sustainability of tourism development	Tourism destination competitiveness
Haarhoff, R.	2017	Investigating long haul inbound airline price competitiveness: a study of South African Airways	African journal of hospitality, tourism and leisure	South Africa	Supply	Price competitiveness= airlines	Price competitiveness

Author/s	Year	Title	Journal name	Case Study Country	Demand/ supply	Research topic	Research focus
Abreu-Novais, M.A., Ruhanen, L. & Arcodia, C.	2018	Destination competitiveness: a phenomenographic study	Tourism management	-	Supply	Factors (review) & models	Destination competitiveness
Blanco-Cerradelo, L., Gueimonde-Canto, A., Fraiz-Brea, J.A. & Diéguez-Castrillón, M.I.	2018	Dimensions of destination competitiveness: analyses of protected areas in Spain	Journal of cleaner production.	Spain	Demand	Indicators	Destination competitiveness

Source: Authors own compilation

The review of the concepts listed in Table 3.1 commences below in the following three main sections. The first sections included the elements of the journal articles focussing on tourism and destination competitiveness.

As seen in Table 3.1 there are only a few articles that were conducted from a demand side. Some of the demand side articles considered the opinions of national tourists, whereas others conducted interviews with or distributed questionnaires to international tourists at the destination. Most of these authors conducted research on models and factors. In the case of Enright and Newton's (2004) study, competitiveness factors that were determined from a supply perspective, Ritchie and Crouch's study, was used.. Whereas the article by authors Kozak *et al.* (2010) utilised specific demand side factors to conduct the research. The factors that were identified in the demand studies differ from each other, which mean that even though the same approach was used, different competitiveness factors were still identified. These studies also used different sample groups (tourists) from different countries. Kozak *et al.* (2010) included the opinions of respondents from Britain, Netherlands, and Germany. The study of Pavlic *et al.* (2011) used tourists that stayed over in the Dubrovnik-Neretva region. The main theme from each of these demand side approach studies is that each of these studies analysed the supply approach side's literature, before commencing with establishing the opinions of the tourists (demand side approach).

Author Garau-Taberner (2007:64) states that if one uses a supply side approach, the tourist's motivation in travelling or their satisfaction of the destination's services are not considered. The tourist's satisfaction is one of the key tools for increasing tourism destination competitiveness (Pavlic *et al.*, 2011:592). This motivates the necessity for conducting research on tourism destination competitiveness from a demand side. The following section includes the categories, as mentioned before.

3.3.1 Journal articles focussing on tourism and destination competitiveness

To start off the analysis, it is important to firstly consider all the articles published on tourism and destination competitiveness among journals as well as over time.

3.3.1.1 Analysis according to articles published in academic journals

It is clear from Table 3.2 that the journal Tourism Management published the most articles on tourism or destination competitiveness (13 articles). This is followed by Journal of Travel Research which published eleven (11) articles on the concepts. The Annals of Tourism Research published seven articles. These top three most identified journals, from the sample are all high-impact journals, which are journals that are highly influential in their field. In other words, these journals form part of the ten top tourism journals indicating destination competitiveness as an important topic within the literature.

The journal, Tourism Economics published seven (7) articles, current issues in Tourism Journal five (5) and Tourism Analysis published three articles. The journals that each published two (2) articles on tourism or destination competitiveness are Journal of Cleaner Production, Journal of Tourism Research, Journal

of Travel and Tourism Marketing, Managing Global Transitions, Procedia -Social & Behavioural Sciences as well as South African Journal of Economic and Management Sciences. The rest of the journals illustrated in Figure 3.1 each published one of the articles. Therefore, it is evident that the articles on tourism and destination competitiveness were published in a wide variety of journals, covering different sectors and fields. From the sixty-six (66) journals used in this study and illustrated in Table 3.2, only eight (8) of the journals in Table 3.1 were African journals. It is evident that twenty-seven (27) of the sixty-six (66) journals were Tourism-specific journals. This indicates that tourism and destination competitiveness is investigated in other sectors and industries as well, such as economics and social sciences.

Table 3.2: Distribution of articles

Journal	Total articles
African Journal of Hospitality, Tourism & Leisure	2
An International Business Journal	1
Annales universitatis apulensis: aeries oeconomica	1
Annals of tourism research	7
Anatolia	2
Anuario Turismo y Sociedad	1
Asian social science	1
Business strategy series	1
Chinese geographical science	1
Current Issues in Tourism	5
Economic Research	2
Encyclopedia of Tourism	1
Engineering economics	1
Environmental and resource economics	1
European journal of tourism research	1
European journal of tourism, hospitality & recreation	1
European Research studies	1
Geographica Pannonica	1
International journal of hospitality & tourism administration	1
International journal of hospitality management	1
International Journal of Scientific & Engineering	1
International journal of services & operations management	1
Journal of Management & Sustainability	1
Journal of air Transport Management	1
Journal of business research	1
Journal of China tourism research	1
Journal of Cleaner Production.	2
Journal of destination marketing & management	2
Journal of economics & behavioural studies	1
Journal of economic & management sciences	1
Journal of economic studies	1
Journal of hospitality, marketing & management	1
Journal of industry, competition & trade	1
Journal of public administration	1
Journal of management cases	1
Journal of relationship marketing	1
Journal of Tourism & Services	1
Journal of tourism research	2

Journal of tourism planning & development	2
Journal of travel & tourism marketing	2
Journal of travel research	11
Journal of vacation marketing	3
Managing Global Transitions	2
Procedia -social & behavioural sciences	2
Rap — Rio de Janeiro	1
Research in in transportation economics	2
Review of European studies	1
Revista de Administracao publica	1
Riding the Wave of Tourism & Hospitality Research	1
Sitcon	1
South African journal for research in sport, physical education & recreation	1
South African journal of economic & management sciences	2
South Asian Journal of Tourism & Heritage	1
Southern African business review	1
The Southern African journal of entrepreneurship & small business management	1
Tourism management	13
Tourism management perspectives	3
Tourism & Management Studies	1
Tourism Analysis	4
Tourism & Hospitality International Journal	1
Tourism economics	7
Tourism review	1
Tourism today	1
Turizam: međunarodni znanstveno-stručni časopis	1

Figure 3.1 indicates that tourism and destination competitiveness is investigated in other sectors and industries as well.

3.3.1.2 Year of publication of tourism competitiveness articles

Figure 3.2 illustrates the time frame of the published articles in Table 3.1. As mentioned earlier, although Poon (1993) was the first author to conduct research on Tourism competitiveness by publishing a book on the topic, the first articles in the sample were published in 1997, and this review solely focusses on the articles published on the topic.

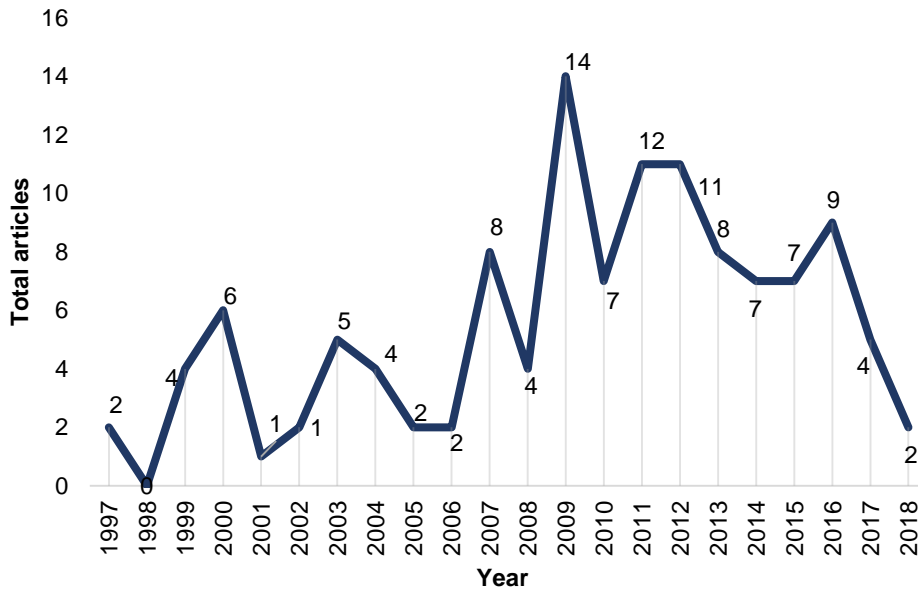


Figure 3.1: Distribution of articles over time

Source: Authors own compilation

Since 1997, articles were published every year, with the exception of the year 1998. The most articles were published in 2009 (14 articles) and twelve (12) articles in 2011 and 2012 respectively. It is clear that more articles have been published since 2009 than in the preceding years where no more than eight (8) articles have been published yearly.. The articles published in 2009 focussed on destination competitiveness and half of these studies conducted a case study on a specific destination’s competitiveness aspects or factors or the models of competitiveness. Not less than four articles were published annually since 2009, which could be due to the fact that researchers started realising the necessity for researching tourism and destination competitiveness seeing that it is essential for tourism destinations. The first listed articles in Figure 3.1, which focussed on Africa was published in 2002 and this was followed by two articles published in 2003, which focussed on South Africa specifically. Even though the amount of published articles on tourism and destination competitiveness is increasing, it is still not sufficient due to the growing importance of destination competitiveness.

3.3.2 A review of the key aspects of the articles

This section (3.3.2) reviews the key aspects of the publications, which includes analyses according to continent on which the research is focussed (case study), supply and demand perceptions, research focus (tourism or destination competitiveness) and research topics (elements such as definitions, models or factors).

3.3.2.1 Journal articles on tourism competitiveness according to the continent of the case study

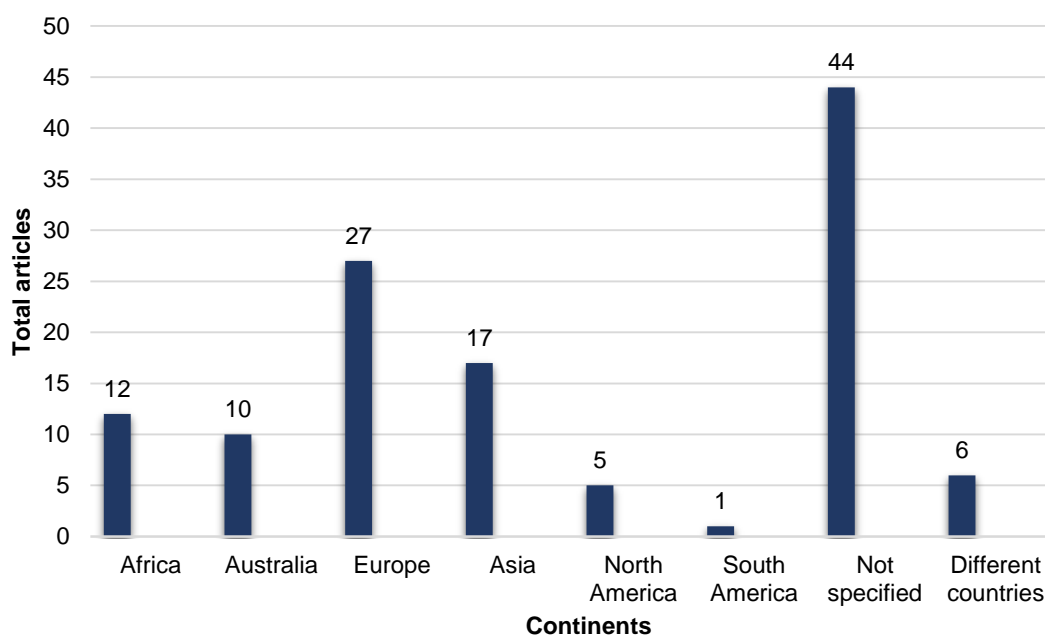


Figure 3.2: Journal articles on competitiveness according to continent of case study

Source: Authors own compilation

This includes the continents or case studies on which the research was based. If a review was conducted by the authors or simply no case study was performed, those articles fell under the option “not specified.” It is clear from Figure 3.2 that forty-four (44) of the one hundred and twenty-one (121) articles were not based on a specific country/continent, but were reviews of tourism or destination competitiveness. As depicted in Figure 3.2, twenty-seven (27) out of the one hundred and twenty-one (121) articles focussed on European countries or were published in that continent. This could be ascribed to the fact that tourism research was driven by European researchers in the early 1900s (AIEST, 1993). Some of the countries, within that continent, which the research was based on was, amongst others, Spain (seven articles), France (three articles), Serbia (three articles) and Slovenia (two articles). From the sample, seventeen (17) of the articles were based on countries from the Asian continent including countries such as Turkey (five articles), China (three articles) and Taiwan (two articles). The African continent had a total of twelve (12) articles whereas eleven (11) out of the twelve (12) were based on South Africa specifically. Figure 3.2 indicates the lack of research on tourism and destination competitiveness in South African literature...

3.3.2.2 Journal articles conducted on tourism competitiveness from a demand or supply approach

Economic factors that influence the tourist’s demand to use the goods and services include, amongst others, the tourist’s income, transport costs and the tourist’s attributes (Saayman. 2013:122). This demand is then measured by observing the number of foreign or local tourists to a destination, tourism expenditures at the destination, distance travelled and number of nights spent by the tourist at the

destination. Tourism demand answers the question: what do tourists want and need in order to visit the destination? It is important for the tourism demand of tourists to be met by the tourism supply of the goods and services (Saayman, 2013:122). The supply side focusses on what the destination has to offer such as attractions, services and accommodation (Fridgen, 1996:260). The research on tourism and destination competitiveness can either be from a demand, supply or demand or supply point of view/approach. Figure 3.3 illustrates the distribution of the sample articles in accordance with the approach.

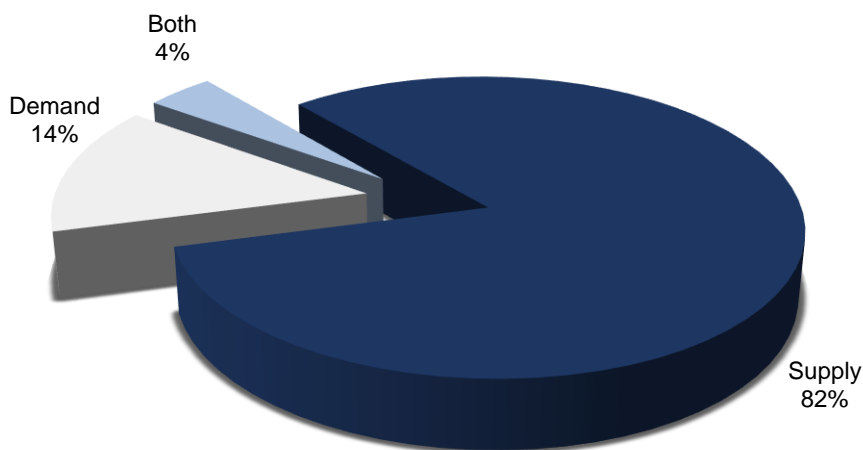


Figure 3.3: Distribution of articles in term of approach

The research articles could either be conducted from a demand or supply side or both. Figure 3.3 indicates that the vast majority of the articles (82%) used a supply side approach whereas only fourteen percent (14%) of the articles on a demand-side approach. Only four percent (4%) of the articles used both these approaches (demand and supply side). This could be due to researchers preferring to ask the opinions of experts in this field of tourism on how to be more competitive, rather than asking the opinions of the tourists. This statement could be debatable because the experts might know more about what makes a destination competitive (Enright & Newton, 2004:781), but the tourists are the people who partially determine the competitiveness of a destination seeing that they decide which country to visit and which one not (Andrades-Caldito *et al.*, 2014:68). However, a gap exists in research concerning tourism and destination competitiveness from a demand side to determine the tourist's opinion on the topic.

3.3.2.3 Journal articles distributed in accordance with research focus

The competitiveness within tourism can be researched from different topics/focus areas including destination competitiveness, tourism competitiveness, tourism destination competitiveness as well as price competitiveness.

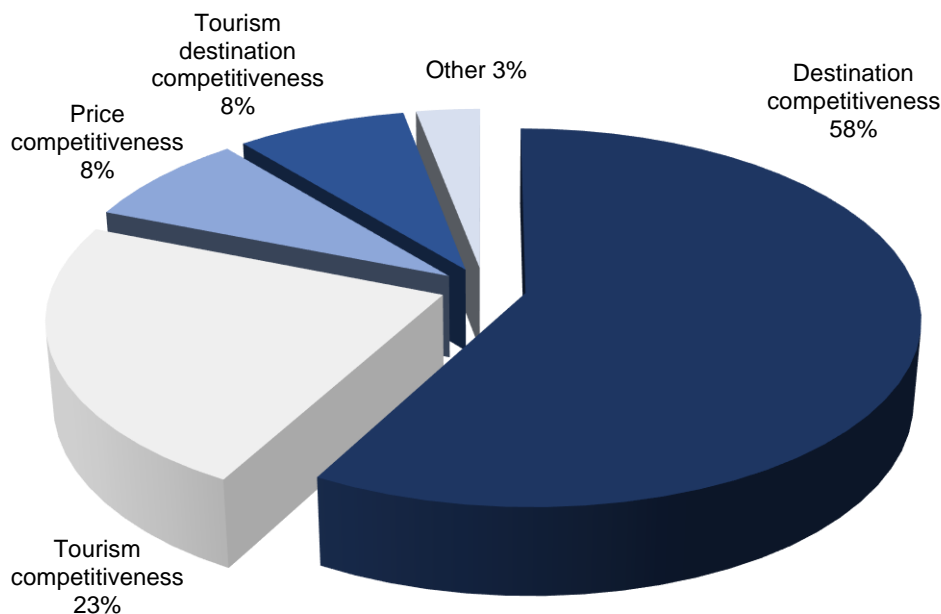


Figure 3.4: Journal articles distributed in accordance with research focus

Source: Authors own compilation

It is clear from Figure 3.4 that the majority of the articles, fifty-eight percent (58%) within the sample focussed on destination competitiveness. Some of these articles include those of Crouch (2011), Dwyer and Kim (2003), Enright and Newton (2005) and Ritchie and Crouch (2000). Twenty-three (23) of the articles focussed on Tourism competitiveness and comprises articles from authors such as Azzopardi and Nash (2017), Heath (2002), Hong (2009), Jiménez (2011), Mihalič (2000) and Ribes, Rodrigues. It is clear that some of the studies (8%) conducted on competitiveness had an economic focus, seeing that the focus was on price competitiveness. More research can be conducted on tourism competitiveness or the difference between destination and tourism competitiveness concepts, to rule out even more confusion of the competitiveness concept.

3.3.2.4 Journal articles distributed regarding research topic

The research conducted on tourism and destination competitiveness focussed on several topics. For purposes of this study the research topics used in the sample articles were divided into four main categories, namely models, factors/indicators, definitions or other aspects. Figure 3.5 illustrates the percentage articles on each of the above-mentioned research topics.

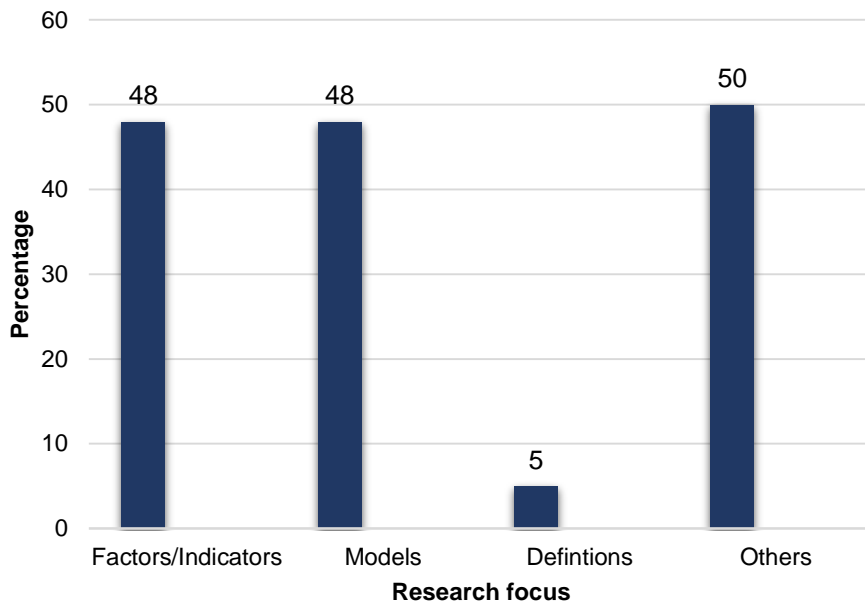


Figure 3.5: Distribution of articles regarding research focus

Some of the articles in the sample focussed on more than one of the mentioned aspects, and in these cases each one of the aspects were considered separately, meaning that the total number of articles in Figure 3.5 will not calculate to the total of one hundred and twenty-one (121) articles. As seen in Figure 3.5, fifty (50) of the articles in the sample were conducted on other elements such as price competitiveness, nature-based destination competitiveness or the comparative advantage of a destination. The price competitiveness articles focussed on how competitive the destinations are in terms of the price competitiveness thereof. As mentioned in Chapter 2, some authors indicate a difference between a competitive and a comparative advantage while others do not. These articles explain this concept. The total number of articles that focussed on models was forty-eight (48) and includes, amongst others, the Dwyer-Kim model of destination competitiveness, the conceptual model of destination competitiveness or the Ritchie and Crouch model, which is the most used. These are all models which are used within the tourism sector. Forty-eight (48) of the articles focussed on the factors/indicators/aspects of destination competitiveness. Please refer to Table 3.1 which contains all the mentioned factors in the articles. The majority of the authors have their own opinion of what these factors or indicators are. Some authors refer to indicators whereas others refer to factor aspects that influence the competitiveness of a destination. There is a lack in current research that solely focusses on the definitions, or provides a universal definition, of tourism or destination competitiveness. Some of these studies that investigate tourism or destination competitiveness definitions either compile new definitions or compare current definitions with each other, instead of compiling a universal definition.

3.3.3 A Review of tourism competitiveness factors or aspects

The following section of the analysis aimed at identifying the top ten most used competitiveness factors or aspects from the sample of articles. Dwyer and Kim (2003:369) highlight that there is a variety of factors or indicators that influence the tourism or destination competitiveness of a destination. Table 3.3 contains

competitiveness factors or aspects that were researched in the sample articles of the current study. The factors identified in Table 3.3 were obtained from the research articles indicated in Table 3.1. Table 3.3 contains more than thirty (30) different publications on the competitiveness factors or aspects of a tourist destination. It is interesting to observe that each author indeed holds an own opinion as mentioned earlier and do differ from each destination, which means that it is important to conduct destination-specific research on destination competitiveness. Authors such as du Plessis *et al.* (2015:7), Heath (2002:343:) and Pansiri (2014:242) identified destination-specific competitiveness factors of Africa including the African experience, access to wildlife-/plant life viewing and interpretation of wildlife/plant life. These are factors/aspects that can directly influence the competitiveness of Africa or even more specifically South Africa as a competitive tourist destination. These factors/aspects will not necessarily be applicable to other continents such as Europe or Asia, but apply to South Africa only and vice versa. This identification of factors or aspects could influence future research to be conducted on tourism or destination competitiveness factors of other destinations or approach.

Table 3.3: Factors or aspects of competitiveness from sample articles

Year of Publication	Factors/Aspects	Approach
Ritchie, J.R.B. & Crouch, G.I., 2000	<p>Core resources and attractions</p> <ul style="list-style-type: none"> •Physiography and climate •Culture and history •Market ties •Mix of activities •Special events •Entertainment •Superstructure <p>Supporting factors and resources</p> <ul style="list-style-type: none"> •Infrastructure, •Accessibility •Facilitating resources •Hospitality •Enterprise <p>Destination management</p> <ul style="list-style-type: none"> •Resource stewardship •Marketing •Finance and venture capital •Organization •Human resource development •Information/research •Quality of service •Visitor management <p>Amplifying and qualifying determinants</p> <ul style="list-style-type: none"> •Location •Interdependencies •Safety •Awareness/image/brand •Cost/value <p>Destination policy, planning, and development</p> <ul style="list-style-type: none"> •System definition •Philosophy 	Supply

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Vision •Audit •Positioning •Development •Competitive/collaborative analysis •Monitoring •Evaluation 	
Mihalič, T., 2000	<p>Destination management</p> <ul style="list-style-type: none"> •Willingness and efforts to minimise the negative environmental impacts •Willingness and efforts to invest in environmental protection and preservation •Creation of high level of destination awareness regarding the environmental aspects •Development of a strong environmental image of the destination •The use of brands and trademarks and symbols which capture the environmental spirit of the destination <p>Destination organisation</p> <ul style="list-style-type: none"> •Serve as a focal point for the coordination of all environmental activities in the destination •Provide leadership in environmental marketing of the destination •Serve as a catalyst and facilitator for environmentally sound tourism development •Provide common services which enhance the quality of the visitor experience, regarding the environmental issue •Co-operate with all levels of government and other public organisations to represent the views of the destination on decisions affecting the environment •Provide specialised services to improve the environmental effectiveness and the profitability of members of the DMO •Coordinate the collection and dissemination of environmental information and research •Support the development and delivery of environmental education and training programs at the destination •Alliances with environmentally sound companies and organisation •Alliances with environmentally aware destinations, especially with the destinations that participate in the same environmental awarding scheme •Research alliances with universities and environmental expert organisations •Alliances with tourism industry through environmental programs, research, awards <p>Destination information</p> <ul style="list-style-type: none"> •Visitor statistics with detailed data on environmental issues •Collecting and distributing data on environmental quality of the destinations •Collecting and distributing data on environmental impacts of the visitors, travel and tourism sector and other sectors •The attitude of the local population towards environmental management and their participation •Market segmentation studies •Forecasting tourist demand regarding the environmental aspects of the destinations •Tourist satisfaction studies, which identify the environmental problems and opportunities •Research on the effectiveness of the environmental image of the destination and the effectiveness of its management (promotion) <p>Destination efficiency</p> <ul style="list-style-type: none"> •Establishment of environmental standards •Programs to monitor the quality of the visitors' environmental experience 	Supply

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Monitoring residents' attitudes towards tourism in regard to environmental issues •Efforts to ensure public environmental awareness and participation in tourism development •Support for environmental education and training programmes 	
Heath, E., 2002	<p>Inherited attractors</p> <ul style="list-style-type: none"> •Natural attractors •Cultural attractors •Heritage attractors <p>Created Attractors</p> <ul style="list-style-type: none"> •Events •Range of available activities •Entertainment •Shopping 	Supply
Saayman, M. & du Plessis, E., 2003	<ul style="list-style-type: none"> •Location; Long-haul destination •Dependencies on support services •Safety •Value for money •Marketing •Availability of information •Quality of service •Geographical features •Marketing connections (networks) •Accessibility •Infrastructure & tourism supra structure •Historical & cultural resources •Climate •Availability/quality of accommodation •Sports/recreational opportunities •Scenery •Food Entertainment •Uniqueness of local people's life •Historical attractions •Museums, cultural attractions •Ability to communicate •Festivals •Shopping •Attitude towards tourists •Public transportation •Foreign exchange •Friends and family •Other: Airline links •Other: Easy acquisition of visas 	Supply
Dwyer. L. & Kim. C., 2003	<p>Endowed resources</p> <ul style="list-style-type: none"> •Cultural/heritage resources <p>Created resources:</p> <ul style="list-style-type: none"> •Tourism infrastructure •Special events •Activities •Entertainment •Shopping <p>Supporting factors and resources</p>	Supply

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •General infrastructure •Quality of service •Accessibility of destination •Hospitality •Market ties Destination management •DMO •Destination marketing management •Destination policy •Planning and development •Human resource development •Environmental management Situational conditions •Location; safety/security •Price competitiveness •Competitive environment •Global environment Demand conditions •Tourist preferences •Awareness of destination •Destination image 	
<p>Dwyer, L., Mellor, R., Livaic, Z., Edwards, D. & Kim, C., 2004</p>	<p>Destination Management</p> <ul style="list-style-type: none"> •Tourism development responsive to community needs •Tourism development responsive to visitor needs •Destination “vision” reflecting visitor values •Level of cooperation between firms in destination •Entrepreneurial qualities of local tourism businesses •Access to venture capital •Destination vision reflecting industry stakeholder values •Foreign investment in destination tourism •Quality of research in tourism •Hospitality development programs for residents •Tourism firms with business ethics •Cooperation between public and private sector •Destination with clear policies in “social” tourism •Tourism training responsive to visitor needs •Communication between tourists and residents •Investment environment for tourism development •Packaging of destination experiences for visitors •Destination links with major origin markets •Fit between destination products and consumer preferences •International awareness of destination’s product •Responsiveness of tourism industry to visitor needs •Private sector recognition of importance of “sustainable” tourism •Links between destination and travel trade •Tourism firms ensuring visitor satisfaction •Value for money in destination experiences •Resident support for tourism development •Public sector recognition of “sustainable” tourism •Overall destination image •NTO reputation for attracting visitation •Range/quality of training programs 	<p>Demand</p>

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Capabilities of managers •Private sector commitment to education & training •International awareness of destination •Community support for special event •Attitudes of residents towards visitors Nature-based Resources •Water-based activities •Unspoiled nature •Adventure activities •Tourism development integrated with industry development •Flora & fauna Nature-based activities •National parks, nature reserves Recreation facilities •Attractiveness of climate for tourism Natural wonders/scenery “Cleanliness” of destination •Visitor accessibility to nature areas Sport facilities (e.g., golf, tennis) •Health/medical facilities for tourists •Value for money in accommodation •Accommodation (variety, quality) •Special events/festivals Entertainment •Tourist guidance and information •Local tourism transportation efficiency/quality •Variety of cuisine •Financial institutions/currency exchange facilities •Food service facilities •Security/safety of visitors Heritage Resources •Traditional arts •Artistic and architectural features •Historic/heritage sites Quality Service •Cultural precincts •Telecommunication system for tourists •Industry appreciation of service quality •Quality of tourism services Efficient Public Services •Efficiency of customs/immigration •Attitude of customs/immigration officials •Airport efficiency/quality Tourism shopping •Value for money of shopping •Diversity of shopping Government Commitment •Government leadership in tourism development •Public sector commitment to tourism training Location and Access •Direct flights into destination •Distance to destination •Frequency/capacity of access transport to destination e-business Use of information •Use of information technology by tourism firms •Use of e-commerce by tourism firms Night Life 	

Year of Publication	Factors/Aspects	Approach
	Visa Requirements •As an impediment to visitation Amusement/Theme Parks	
Hudson, S., Ritchie J.R.B. & Timur, S., 2004	<ul style="list-style-type: none"> •Interdependencies •Safely/security •Awareness/image/brand •Cost/value •System definition •Philosophy •Vision •Audit Positioning Development •Competitive/collaborative •Monitoring & evaluation •Resource stewardship •Marketing Finance & venture capital •Organization Human resource development •Information/research •Quality of service •Visitor management •Physiography & climate •Culture & history •Market ties •Mix of activities •Special events •Entertainment •Superstructure •Infrastructure Accessibility •Facilitating resources •Hospitality •Enterprise 	Supply
Enright, M.J. & Newton, J., 2004	<p>Tourism-specific factors</p> <ul style="list-style-type: none"> •Physiography •Culture and history •Activities •Special events •Cuisine •Safety <p>Business- and industry-related factors</p> <ul style="list-style-type: none"> •Inputs •Industrial and consumer demand •Inter-firm competition and cooperation •Industrial and regional clustering •Internal <p>Organization and strategy of firms</p> <ul style="list-style-type: none"> •Institutions, social structures and agendas •Market ties •Tourism business superstructure •Additional drivers 	Supply
Gooroochurn, N. & Sugiyarto, G., 2005	<p>Price indicator</p> <ul style="list-style-type: none"> •Hotel price •Purchasing power parity <p>Infrastructure indicator</p>	Supply

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Road index •Sanitation facilities •Improved drinking water Environment indicator •Population density •CO2 emissions Technology indicator •Internet hosts •Telephone lines •Mobile phones •High-tech exports Human resources indicators •Education index Openness indicator •Visa •Tourism openness •Trade openness •Taxes on trade Social indicator •Human development index •Newspapers •Personal computers •TV sets 	
Enright, M.J. & Newton, J., 2005	<ul style="list-style-type: none"> •Safety •Cuisine •Dedicated tourism attractions •Visual appeal •Well-known landmarks •Nightlife •Different culture •Special events •Interesting architecture •Interesting festivals •Climate •Local way of life •Notable history •Museums and galleries •Music and performances •Staff costs factors •Other costs •Good retail sector •Level of technology •China market potential •Strategies of local firms •Free port status •Political stability •Cleanliness of government •Education and training •institutions •Strong currency 	Supply
Bahar, O. &	<p>Cultural & natural attractiveness</p> <ul style="list-style-type: none"> •Attractiveness of historical attractions 	Demand &

Year of Publication	Factors/Aspects	Approach
Kozak, M., 2007	<ul style="list-style-type: none"> •Attractiveness of cultural attractions •Attractiveness of natural environment •Level of hospitality / friendliness •Overall attractiveness •Diversity of tourism products •Quality of sea and beaches Quality of tourist services •Standard of hygiene and sanitation •Quality of tourist services •Quality of local food and beverage •Overall value for money •Standard of facilities and activities for children •Standard of accommodation facilities Availability of tourist facilities & activities •Availability of nightlife and entertainment •Availability of sport activities and facilities •Availability of shopping facilities •Standard of health services •Effectiveness of the promotion and publicity •Quality of local transport network and services •Quality of infrastructure •Quality of banking services •Quality of the destination airport •Quality of telecommunication network •Distance to my home country 	Supply
Gomezelj, D.O. & Mihalič, T., 2008	<ul style="list-style-type: none"> •Unspoiled nature, •Flora and fauna, •Attractiveness of the climate and traditional •Arts •Health resorts, visitor accessibility to •Natural areas, •Variety of cuisine, •Casinos, •Nature-based activities, •Accommodation • Food service facilities •Amusement/theme parks, •Community support for special events and nightlife •Hospitality, •Communication and trust between tourists and residents, •Accessibility of the destination, the •Telecommunication system for tourists, •Quality of tourism •Services, and financial institutions •Currency exchange facilities. •Tourism development, appreciation of the importance of •Service quality •Tourism/hospitality •Training responsive to visitor needs and private sector recognition •Foreign investment, •Government cooperation 	Supply

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •In the development of tourism policy, •Public sector recognition of the importance of sustainable tourism •Development, the quality of research input into tourism •Policy, planning and development are all rated relatively low •Security/safety of visitors, political stability, value for money in destination tourism experiences •Value for money in accommodation •The use of IT by firms •Value for money in shopping items •Access to venture capital •The investment environment •The use of ecommerce •Manager capabilities •International awareness of destination •International awareness of destination products •Fit between destination and tourist preferences •Overall destination image 	
<p>Miller, M. M., Henthorne, T. L. & George, B. P. , 2008</p>	<ul style="list-style-type: none"> •Tropical climate •Beaches •Historic structures •Attractive landscapes •Air infrastructure 	Supply
<p>Navickas, V. & Malakauskaite.A , 2009</p>	<p>Price competitiveness indicators</p> <ul style="list-style-type: none"> •Hotel and restaurant prices •Prices of tourist goods and services (souvenirs, etc.) •Purchasing power parity <p>Infrastructure development indicators</p> <ul style="list-style-type: none"> •Road index •Railroad network •Airlines and telecommunication system quality •Availability of hygiene infrastructure •Quality of drinking water <p>Ecology (environment) related indicators</p> <ul style="list-style-type: none"> •Population density •Carbon dioxide emission •Ratified international agreements in the field of environmental policy <p>Technological advancement indicators</p> <ul style="list-style-type: none"> •Internet index •Phone index •Mobile phone index •High-tech export <p>Human resource indicators</p> <ul style="list-style-type: none"> •Population •Education index <p>Market openness indicators</p> <ul style="list-style-type: none"> •Visa index •Tourism and trade openness degree •Taxes on international trade <p>Human tourism indicators</p> <ul style="list-style-type: none"> •Tourism participation index •Tourism impact index <p>Social development indicators</p>	Supply

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Social development index •Newspapers •Internet cafes •TV sets 	
Mathew, V., 2009	<p>Support activities</p> <ul style="list-style-type: none"> •Human resources development •Administrative support •Infrastructure •Physical support •Policies, capacity, personal safety and security •Culture •Climate •Events, •Linkage •Channels, •Network •Community involvement, •Benchmarking •Environmental development <p>Key success drivers</p> <ul style="list-style-type: none"> •Inputs Business plan •Competencies •Cooperation •Entrepreneurs, •Investments •Leadership •Objectives •People •Policy •Portfolio •Resources •Strategies <p>Sustainable process</p> <ul style="list-style-type: none"> •Image building •Competency •Design •Development •Product •Development •Quality management •Sales •Service delivery <p>Leverage/operation</p> <ul style="list-style-type: none"> •Brand management •Core competencies •Customer relationship •Marketing, •Expansion, •Opportunity identification, •Positioning, •Strengths and weaknesses 	Supply

Year of Publication	Factors/Aspects	Approach
	<p>Destination marketing</p> <ul style="list-style-type: none"> •Promotion, attraction •Sales •Events •Target marketing •Strategic positioning •Innovation <p>Sustainable services</p> <ul style="list-style-type: none"> •Service experiences •Hospitality •Accommodation, •Entertainment •Society focus 	
<p>Lee, C.F. & King, B., 2009</p>	<p>Natural resources</p> <ul style="list-style-type: none"> •High grade natural hot springs •Plentiful natural hot springs •Abundant natural scenery •Comfortable climate <p>Cultural assets</p> <ul style="list-style-type: none"> •Community shopping districts featuring a mix of souvenir and tourist shops* •Various local cultural traditions and specialities •Guided tours of local art and culture <p>Notable historical landmarks nearby</p> <ul style="list-style-type: none"> •Special attractions Year-round recreational activities •Special events and festivals held on a regular basis <p>Accommodation</p> <ul style="list-style-type: none"> •Authentic accommodation experiences •Comfortable accommodation in a natural setting •High quality and international standard accommodation •Adequate capacity of accommodation establishments <p>Cuisine</p> <ul style="list-style-type: none"> •Authentic recipes using ethnic ingredients and cooking styles •Health-oriented gourmet utilizing seasonal produce <p>Transportation</p> <ul style="list-style-type: none"> •Convenient access to hot springs •Ample parking spaces •Clear guidance signs •Sound local transportation network •Reliable public transport services 3 •Comprehensive network of international routes to and from Taiwan <p>Safety and security</p> <ul style="list-style-type: none"> •Hygiene standards for hot springs spa equipment •Safety of the bathing environment •Safety of the overall destination •Personal safety and hygiene-0basic rules and responsibility •Emergency medical care and the availability of ambulance services 	<p>Supply</p>
<p>Kozak, M., Baloğlu, Ş. & Bahar, O., 2009</p>	<p>Availability of Facilities and Activities</p> <ul style="list-style-type: none"> •Availability of sport activities and facilities •Effectiveness of the promotion and publicity 	<p>Demand</p>

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Suitability of nightlife and entertainment •Standard of facilities and activities for children •Availability of shopping facilities •Standard of accommodation facilities •Distance to my home country <p>Cultural and</p> <p>Natural Attractiveness</p> <ul style="list-style-type: none"> •Attractiveness of historical sources •Attractiveness of cultural sources •Attractiveness of natural environment •Diversity of tourism products •Overall attractiveness •Quality of sea and beaches <p>Quality of Services</p> <ul style="list-style-type: none"> •Quality of services •Standard of hygiene and sanitation •Level of hospitality and friendliness •Quality of local food and beverage •Overall value for money <p>Quality of Infrastructure</p> <ul style="list-style-type: none"> •Quality of banking services •Quality of telecommunication network •Quality of health services •Quality of the destination airport •Quality of local transport network and services 	
Hong, W.C., 2009	<ul style="list-style-type: none"> •Infrastructure investments •Strategic planning to market ties •Maintaining resources •Monitoring resources allocations •Growth and development •Operational performance effectiveness •Facilitating resources created 	Supply
Ritchie, J.R.B. & Crouch, G.I., 2010	<ul style="list-style-type: none"> •Physiography •Climate •Culture and history •Market ties •Mix of activities •Special events •Entertainment •Tourism superstructure •Infrastructure •Facilitating •Resources •Enterprise •Accessibility •Hospitality •Political will •Audit 	Supply

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •System definition •Philosophy •Competitive/collaborative analysis •Positioning •Tourism development •Monitoring and evaluation •Marketing. •Service experience •Information/research •Organization function •Finance and venture capital •Human resource •Development •Visitor management •Crisis management •Resource •Stewardship •Location •Interdependencies •Safety and security •Awareness and image •Cost/value •Carrying capacity 	
Kayar, Ç.H. & Kozak, N., 2010	<ul style="list-style-type: none"> •Policy Rules and Regulations •Environmental Regulation •Safety and Security •Health and Hygiene •Prioritization of Travel and Tourism •Air transport Infrastructure •Ground Transport Infrastructure •Tourism Infrastructure •Information and Communication Technology Infrastructure •Price Competitiveness in Tourism •Human Resources •National Tourism Perceptions •Natural and Cultural Resources 	Supply
Shirazi, S.F.M. & Som, A.P.M., 2011	<ul style="list-style-type: none"> •Infrastructure investments •Strategic planning to market ties •Maintaining resources •Monitoring resources allocations •Growth and development •Operational performance effectiveness •Facilitating resources created 	Not mentioned
Ribes, J.F.P., Rodríguez, A.R. & Jiménez, M.S., 2011	<p>Porter's Diamond model:</p> <ul style="list-style-type: none"> •Firm strategy, structure and rivalry •Demand conditions •Related and supporting industries •Factor conditions 	Supply
Crouch, G.I., 2011	<p>Core resources and attractors</p> <ul style="list-style-type: none"> •Special events •Physiography and climate 	Supply

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Culture and history •Mix of activities •Entertainment •Superstructure •Market ties Supporting factors and resources •Infrastructure •Accessibility •Facilitating resources •Hospitality •Enterprise •Political will Destination policy, planning and development •System definition •Philosophy/values •Vision •Positioning •Development •Competitive/collaborative analysis •Monitoring and evaluation •Audit Destination management •Organization •Marketing •Quality of service/experience •Information/research •Human resource development •Finance and venture capital •Visitor management •Crisis management •Resource stewardship Qualifying and amplifying determinants •Location •Safety/security •Cost/value •Interdependencies •Awareness/image •Carrying capacity 	
<p>Armenski, T., Marković, V., Davidović, N. & Jovanović, T., 2012</p>	<ul style="list-style-type: none"> Created resources •Nightlife •Variety of cuisine •Special events/festivals •Food service facilities •Health resorts, spa •Winter based activities •Diversity of shopping experience •Rural tourism •Entertainment •Nature based activities •Congress tourism •Community support for special event •Sport facilities 	<p>Supply</p>

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Local tourism transportation efficiency/quality •Casino •Adventure activities •Accommodation •Recreation facilities •Tourism guidance and information •Existence of tourism programs for visitors •Airport efficiency/quality •Amusement/Theme parks •Visitors accessibility to natural areas •Water based activities Supporting resources •Hospitality of residents towards tourists •Financial institutions and currency •exchange- facilities •Telecommunication system for tourists •Communication and trust between tourists and residents •Destination links with major origin markets •Attitudes of custom/immigration officials •Quality of tourism sector •Health/medical facilities to serve tourists •Efficiency of customs/immigration •Accessibility of destination •Visa requirement as impediment to visitation •Tourism animation Destination management •Appreciation of service quality importance •Destination has clear policies in social tourism •Destination vision reflecting community values •Destination vision reflecting tourists' values •Destination vision reflecting resident values •Destination vision reflecting stakeholder values •Developing and promoting new tourism products •Development of effective destination branding •Educational structure/profile of employees in tourism •Efficiency of tourism/hospitality firms •Entrepreneurial qualities of local tourism businesses •Existence of adequate tourism education programs •Extend of foreign investment in destination tourism industry •Government co-operation in development of tourism policy •Level of co-operation between firms •NTO reputation •Private sector commitment to tourism/hospitality education •Private sector recognition of importance of sustainable tourism development •Public sector commitment to tourism/hospitality education •Public sector recognition of importance of sustainable tourism development •Quality in performing tourism services •Quality of research input to tourism policy, planning, development •Resident support for tourism development •Tourism development integrated with overall industry development •Tourism/hospitality training responsive to visitors needs Situational conditions •Access to venture capital 	

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Co-operation between public and private sector •Investment environment •Managers capabilities •Political stability •Security/safety of visitors •Use of e-commerce •Use of IT by firms •Value for money in accommodation •Value for money in shopping items •Value for money in tourism destination experience <p>Demand conditions</p> <ul style="list-style-type: none"> •Fit^o between destination products and tourists' preferences •International awareness of destination products •Overall destination image •International awareness of destination 	
<p>Wang, C.Y., Hsu, M.K. & Swanson, S.R., 2012</p>	<p>Tourism resources</p> <ul style="list-style-type: none"> •Natural landscape •Way of life and customs •Places of historical or cultural interest •Cultural activities <p>Destination supporting factors</p> <ul style="list-style-type: none"> •Support of government •Friendliness of local people •Support of related business <p>Tourism superstructure</p> <ul style="list-style-type: none"> •Food facilities •Accommodation facilities •Shopping facilities •Tourism transportation facilities <p>Infrastructure</p> <ul style="list-style-type: none"> •Communication facilities •Water supply facilities •Electricity supply facilities •Financial service facilities •Public health service facilities <p>Destination management</p> <ul style="list-style-type: none"> •Destination management organization •Destination marketing •Destination policy, planning, and development •Human resource development •Information management •Environment management •Crisis management <p>Tourist service quality</p> <ul style="list-style-type: none"> •Comfortable tourist service •Timely tourist service •Specialized tourist service •Accurate tourist service •Convenient tourist service •Standardized tourist service 	<p>Supply</p>
<p>Salman, A. &</p>	<ul style="list-style-type: none"> •Safety and security •Cleanliness 	<p>Demand</p>

Year of Publication	Factors/Aspects	Approach
Hasim, M.S., 2012	<ul style="list-style-type: none"> •Good image •Overall cost •Friendliness of local people •Hospitality •Natural environment •Food/cuisine •Tourism •Products and services 	
Caber, M., Albayrak, T. & Matzler, K., 2012	<ul style="list-style-type: none"> • Safety • Cuisine (gastronomy) •Natural beauty •Nightlife •Different culture •Interesting organizations and activities •Interesting architecture •Climate •Notable history and heritage •Museums and galleries •High quality accommodation •Transportation facilities (in the area) •Shopping •Price/performance ratio in the country •Advanced infrastructure •Accessibility (to the area) •Hospitality •Acceptance of children •Health and wellness offers •No language barriers 	Demand
Armenski, T., Gomezelj, D.O., Djurdjev, B.V., Ćurčić, N. & Dragin, A.R.A., 2012	<p>Inherited Resources</p> <ul style="list-style-type: none"> •Historic sites •Heritage •Traditional arts •Flora and fauna •Artistic and architect features •Unspoiled nature •National parks •Attractiveness of climate for tourism •Cleanliness <p>Created resources</p> <ul style="list-style-type: none"> •Nightlife •Variety of cuisine •Special events/festivals •Food service facilities •Health resorts, spa •Winter based activities •Diversity of shopping experience •Rural tourism •Entertainment •Nature based activities •Congress tourism •Community support for special event •Sport facilities 	Demand

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Local tourism transportation efficiency/quality •Casino •Adventure activities •Accommodation •Recreation facilities •Tourism guidance and information •Existence of tourism programs for visitors •Airport efficiency/quality •Amusement/Theme parks •Visitors accessibility to natural areas •Water based activities Supporting factors •Hospitality of residents towards tourists •Financial institutions and currency exchange- facilities •Telecommunication system for tourists •Communication and trust between tourists and residents •Destination links with major origin markets •Attitudes of custom/immigration officials •Quality of tourism sector •Health/medical facilities to serve tourists •Efficiency of customs/immigration •Accessibility of destination •Visa requirement as impediment to visitation •Animation Destination management •Appreciation of service quality importance •Destination has clear policies in social tourism •Destination vision reflecting community values •Destination vision reflecting tourists' values •Destination vision reflecting resident values •Destination vision reflecting stakeholder values •Developing and promoting new tourism products •Development of effective destination branding •Educational structure/profile of employees in tourism •Efficiency of tourism/hospitality firms •Entrepreneurial qualities of local tourism businesses •Existence of adequate tourism education programs •Extend of foreign investment in destination tourism industry •Government co-operation in development of tourism policy •Level of co-operation between firms •NTO reputation •Private sector commitment to tourism/hospitality education •Private sector recognition of importance of sustainable tourism development •Public sector commitment to tourism/hospitality education •Public sector recognition of importance of sustainable tourism development •Quality in performing tourism services •Quality of research input to tourism policy, planning, development •Resident support for tourism development •Tourism development integrated with overall industry development 	

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Tourism/hospitality training responsive to visitors needs Situational conditions •Access to venture capital •Co-operation between public and private sector •Investment environment •Managers capabilities •Political stability •Security/safety of visitors •Use of e-commerce •Use of IT by firms •Value for money in accommodation •Value for money in shopping items •Value for money in tourism destination experience Demand conditions • “Fit” between destination products and tourists’ preferences •International awareness of destination products •Overall destination image •International awareness of destination 	
<p>Dragičević, V., Jovičić, D., Blešić, I., Stankov, U. & Bošković, D., 2012</p>	<p>Core resources and attractors</p> <ul style="list-style-type: none"> •Multicultural ambience •Gastronomy offer •Entertainment, •Festival and events •The attractiveness of cultural heritage •Tourist attractions signalling •Quality of hotel services •Shopping opportunities •Congress centres •Unspoiled nature •Availability of up-to-date audio-visual equipment •Fairs and exhibition centres •Climate •Sport-recreation activities •Specific venues for holding business events <p>Supporting factors and resources</p> <ul style="list-style-type: none"> •Hospitality of local residents •Accessibility of destination •Local transportation quality •Presence of foreign/international companies •Incentives for tourism development <p>Qualifying and amplifying determinants</p> <ul style="list-style-type: none"> •Geographical location •Costs of transport •Safety/security •Hotel prices •Overall destination image •Political stability •Value for money •Cleanliness of destination •Economic stability •On line booking of accommodation <p>Destination management</p>	<p>Supply</p>

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Knowledge of foreign languages among employees in Tourism •Opportunities for education in tourism field •Educational profile of employees in tourism •Existence of adequate education programs in business Tourism •Destination reputation related to business events and Tourism •Existence of tourism programs and tours for visitor •Development and innovations of business tourism Product •Availability of tourist promotion materials in foreign Languages •Co-operation between public and private sector in tourism field •Human resources specialist for business events •Promotion of destination as business tourism Destination •Availability of information linked to business tourism on destination 	
Pansiri, P.,2013	<p>Destination management</p> <ul style="list-style-type: none"> •Tourist guidance and information •Existence of tourism programs for visitors •Public sector recognition of importance of sustainable tourism development •Private sector recognition of sustainable tourism development importance •Value for money in shopping items •Cooperation between public and private sector •Entrepreneurial qualities of local tourism businesses •Efficiency of tourism/hospitality firms •Existence of adequacy tourism education programs •Tourism/hospitality training responsive to visitor needs •Destination vision reflecting tourist values •Destination vision reflecting resident values •Destination vision reflecting stakeholder values •Destination vision reflecting community values •Developing and promoting new tourism products •Destination has clear policies in social tourism (e.g., disabled) •Tourism development integrated with overall industry development •Government cooperation in development of tourism policy •Resident support for tourism development •Public sector commitment to tourism/hospitality education and training •Private sector commitment to tourism/hospitality education and training •Educational structure/profile of employees in tourism •Development of effective destination branding •Extent of foreign investment in destination tourism industry •Appreciation of service quality importance •Quality in performing tourism services •Manager capabilities <p>Created Resources</p> <ul style="list-style-type: none"> •National cuisine/drinks •Accessibility to cultural heritage sites •Diversity of athletic activities •Equipment for athletic activities 	Demand & Supply

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Visitor centres •Helpful police services •Facilities for children •Telecommunications •Convenience and access to local transport •Water based activities (e.g., swimming, surfing, boating, fishing) •Congress tourism •Health resorts, spa •Special events/festivals •Entertainment (e.g., theatre, galleries, cinemas) •Community support for special events •Diversity of shopping experience •Amusement/theme parks •Health/medical facilities to serve tourists •Financial institutions and currency exchange facilities •Animation •Telecommunication system for tourists •Destination links with major origin markets (e.g., business, trade, sporting) •Visa requirements as an impediment to visitation •Use of e-commerce •Use of IT by firms •Access to venture capital •Investment environment Inherited nature based resources •Access to wildlife/plant life viewing •Interpretation of wildlife/plant life •Attractiveness of climate for tourism Unspoiled Nature •Flora and fauna (e.g., animals, birds, forests) •National parks •Nature based activities (e.g., bushwalking, bird watching) Situational safety conditions •Security/safety of visitors •Political stability •Value for money in destination tourism experiences •Value for money in accommodation Supporting Hospitality factors •Quality of tourism services •Accessibility of destination •Communication and trust between tourists and residents •Efficiency of customs/immigration •Attitudes of customs/immigration officials •Hospitality of residents towards tourists Demand conditions •Botswana's reputation •Overall destination image •International awareness of destination • "Fit" between destination products and tourist preferences •International awareness of destination products Supporting airport services conditions •Service at the airport •Maintenance and convenience at the airport •Personal safety •Friendliness of the people 	

Year of Publication	Factors/Aspects	Approach
	Historical and Cultural Heritage Resources <ul style="list-style-type: none"> • Interpretation of cultural heritage sites • Traditional arts 	
Goffi, G., 2013	<p>Sustainable Tourism Policy and Destination Management</p> <ul style="list-style-type: none"> • Political commitment to tourism • Integrated approach to tourism planning • Environmentally compatible approach to tourism development planning • Public sector commitment to minimizing negative environmental impacts of tourism • Public sector commitment to minimizing negative social impacts of tourism on local community • Public sector commitment to maximising economic impacts of tourism on local community • Clear policies in creating formal employment opportunities • Emphasis on community empowerment • Public sector commitment to tourism hospitality education and training • Collaboration among public sector units for local tourism development • Cooperation between public and private sector for local tourism development • Emphasis on community participatory process in tourism planning • Effectiveness of destination positioning • Effective market segmentation • Effectiveness in crafting tourism experiences • Tourist destination communication • Visitor satisfaction management • Tourist guidance and information • Stewardship of the natural environment • Tourism impacts management and monitoring • Effectiveness of destination management structure • Promotion of partnerships between public and private stakeholders • Promotion of partnerships among tourist businesses <p>General Infrastructures</p> <ul style="list-style-type: none"> • Environmental friendliness and quality of transportation services • Quality of road system • Communication system • Accessibility of facilities by disabled persons • Medical care facilities • Sanitation, sewage and solid waste disposal <p>Events and Activities</p> <ul style="list-style-type: none"> • Events • Leisure activities • Nightlife • Shopping <p>Responsible Tourist Behaviour</p> <ul style="list-style-type: none"> • Tourist's interest in local heritage • Tourist's respect for local culture • Environmental awareness <p>Managerial Competencies of Local Tourism Firms</p> <ul style="list-style-type: none"> • The management capabilities and professional skills of the business operator • Skills of the business operators • The use of the IT • Presence of local tourism firms <p>Destination Marketing</p>	Demand

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Effectiveness of destination positioning •Market segmentation •Awareness of the destination Quality of natural resources •Natural resources •Environmental quality •Safety Gastronomy •Gastronomy and typical products •Food service quality •Local supply of goods Historical and Artistic Features •Historical and archaeological sites •Artistic and architectural features •Cultural attractors Price Competitiveness •Value for money in destination tourism experience •Value for money in accommodations Visitor Satisfaction Management •Visitor satisfaction management •Level of repeat visitors Tourist Accommodations •Quality •Quantity •Environmental friendliness Emphasis on maximising local economic development •Public sector commitment to maximising economic impacts of tourism on local community 	
<p>Santos, M.C & Ferreira, A.M., 2013</p>	<ul style="list-style-type: none"> Natural attractions •Pleasant climate •Attractive natural scenery Cultural attractions •Beautiful towns and villages to visit •Historical monuments and museums to visit •Offers different events (festivals, concerts, exhibitions) •Traditional, pleasant and varied gastronomy Social attractions •Friendly and hospitable local population Infrastructures •Good hotels/accommodation •No traffic congestion Specific factors •Not overdeveloped in terms of construction •Authenticity has been maintained •No environmental problems, such as air and water pollution or beach erosion •Well-preserved harmonious cultural scenery Global trends •Economic – Good prices •Political – Safe destination •Environmental – Environmental protection measures, such as using renewable energies •Technological – Availability of information on the internet about the destination and activities, No negative comments on social networking sites 	<p>Supply</p>

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Demographic – Health and leisure facilities •Social – Offers products that afford unique and memorable experiences 	
Mulec, I. & Wise, N., 2013	<ul style="list-style-type: none"> •Variety of cuisine •Multi-cultural communities •Natural wonders and scenery •Comfortable climate for tourism •Flora and fauna •Unspoiled nature •Traditional arts •Local architecture •Cultural towns/cities •Traditional villages •National parks and nature reserves suitable for tourism •Cleanliness and sanitation in Vojvodina •Museums in Vojvodina •Historic and archaeological parks •Rivers and canals used for tourism 	Supply
Maharaj, S. & Balkaran, R.A., 2014	<ul style="list-style-type: none"> •Investment •Productivity •Macro-economic •Policy •Branding •Image •Price •Market share •Visitor satisfaction •Safety •Quality of experiences •Innovation •Strategy •Training of human resources •Transformation •Market access •Air access •Aviation pricing •Public transport •Safety and security •Information •Innovation •Product development •Investment skills •Development and quality assurance •SMME development •World Heritage sites •Sports stadiums •Seat capacity •The number of national and international exhibitions 	Supply
Zhou, Y., Maumbe, K., Deng, J. &	<p>Supporting factors and facilities</p> <ul style="list-style-type: none"> •Value for money in shopping items •Variety and quality of restaurants •Variety and quality of accommodation 	Demand & Supply

Year of Publication	Factors/Aspects	Approach
Selin, S.W., 2015	<ul style="list-style-type: none"> •Local transportation efficiency •Communication facilities •Road condition •Shopping facilities Core resources •Nature-based activities •Value for money in tourism experiences •Availability of adventure-based activities •Good weather/climate Attractions and accessibility •Well-known landmarks •Dedicated tourism attractions •Special events •Interesting architecture •Historic sites •Availability of activities for children •Conveniently located •Availability of tourist information •Variety of activities to do Qualifying and amplifying determinants •Hospitality & friendliness of residents •Safety and security •Cleanliness •Well-marked roads/attractions •Accessibility of destination 	
Cibinskiene, A. & Snieskiene, G., 2015	<ul style="list-style-type: none"> External environment factors •Political and legal factor •Political and legal stability •External security •Status of resort •International agreements on tourism promotion •Restrictions for persons from particular countries to arrive (migratory restrictions, visas) Economic factors •Economic growth •Fiscal policy •Monetary policy •Regulatory policy •Part of the city's budget, assigned for tourism development Natural resources •Favourable climate for tourism •Parks •Zoo •Botanical garden •Water bodies, adapted for recreation and tourism •Mineral resources •Objects of natural heritage Social and cultural factors •Education •Demography •Criminogenic situation •Health security-viral disease outbreaks Ecological and natural factors 	Supply

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Water pollution •Air pollution •Internal environment factors Tourism enterprises •Accommodation enterprises •Recreation enterprises •Places for conferences •Travel agencies •Tour operators •Culinary heritage Tourism resources •Historical-cultural resources •Concert halls •Museums •Art galleries •Objects of historical – cultural heritage •Amusement/theme parks •Night life •Events in open spaces of the city Infrastructure of tourism and recreation •Accessibility •Transport •Public transport •Tourism information •Camping's •Guides •Biking trails •Bike rent/repair •Water routes •Rent of water amusement equipment •Hiking trails •Medical services for tourists •Financial institutions and possibilities of currency exchange •Telecommunications for tourists •Safety of tourists •Retail network 	
du Plessis, E. Saayman, M. & van der Merwe, A., 2015	<ul style="list-style-type: none"> Quality and variety of foods •Quality and variety of foods Tourism services •Quality of the tourism service •Availability of information about activities •Availability of support services •Visible and effective marketing •Accessibility of transport services •Infrastructure and tourism supra structure •Availability of different tourism products Location •Long haul destination •Short haul destination •Location of the country Economic benefits 	Supply

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Price •Value for money •Benefit of foreign exchange Attributes •Geographical features •Geographical features •Historical and cultural resources •Variety of accommodation •Scenery •Entertainment and activities •Mega events and festivals •Shopping opportunities •Entertainment •Communication systems •Sports/recreational opportunities •Variety of vacation packages Stability •Political stability in country •Destinations' ability to manage risks •Safety and security African experience •African experience •Uniqueness •Availability of nature-based products Brand and Image •Destination brand •Image and awareness of destination •Quality of the experience on offer 	
<p>Cvelbar, L.K., Dwyer, L., Koman, M. & Mihalič, T., 2016</p>	<ul style="list-style-type: none"> Macro- Environment •Reliance on professional management •Willingness to delegate authority •Extent of staff training Purchasing •power parity (PPP) •Ethical behaviour of firms •Quality of education system •Capacity for innovation •Cost of living •Judicial independence •Public trust in politicians •GDP per capita • Nature of competitive advantage •Quality of natural environment •Quality of scientific institutions emissions •General Infrastructure •Access to improved drinking water •Access to improved sanitations •Physician density •Quality of health care •Internet users •Quality of electricity supply, •Broadband Internet subscription •Road density 	<p>Supply</p>

Year of Publication	Factors/Aspects	Approach
	<ul style="list-style-type: none"> •Risk and safety, •ATM accepting visa cards, •Presence of major car rental companies •Life expectancy •Intensity of local competition •Quality of domestic transportation Business Environment •FDI and technology transfer •Business impact of rules on FDI, •Venture capital availability •Extent of business •internet use, •Firm level of technology absorption, •Availability of the latest technology, •Local supplier quality •Country credit rating Tourism-Based Factors •Endowed Resources Variety of cultural sights •Number of world heritage cultural sights •Number of world heritage natural sights Tourism Infrastructure •Variety of Activities •Variety of shopping •Variety of restaurants •Number of international fairs and exhibitions •Variety of entertainment •Number of hotel rooms, •Number of tour operators •Number of foods and beverages establishments Destination Management •Sustainability of TT •Effectiveness and branding of marketing to attract tourists •Government prioritization of TT, TTCI •Quality of air transport infrastructure, •International air transport network, •Attitude of the local population towards •foreign visitors, •Protected areas, •government expenditure 	

Source: Author's own compilation

Prominent authors, Ritchie and Crouch (2003) and Dwyer and Kim (2003) were some of the first authors who conducted research on tourism competitiveness-specific factors or aspects. As seen in Table 3.2, Ritchie and Crouch (2003) divided their identified aspects into five different groups or factors, which included: supporting factors and resources, core resources and attractors, destination management, destination policy, planning and development as well as qualifying and amplifying determinants. These main categories (factors) then each contain different aspects, amongst others, infrastructure, culture and history, marketing and the location of the destination (Ritchie & Crouch, 2003:63). Authors Dwyer and Kim (2003:68) divided their aspects into seven different groups (factors) including: core resources, supporting

factors and resources, destination management, human resource management, environmental management, situational conditions and demand conditions. Some of these groups (factors) included aspects such as heritage and culture, general infrastructure and accessibility of the destination (Dwyer & Kim, 2003). As seen from this discussion, some of the contributing tourism competitiveness factors/aspects are corresponding, whereas others differ between the two research studies. The aspects activities, safety and events/entertainment were mentioned by most of the researchers such as du Plessis *et al.* (2015), Dwyer and Kim (2003) and Ritchie and Crouch (2000). Differencing aspects include, amongst others, policy (Maharaj & Balkaran, 2014), government cooperation (Pansiri, 2013) and Health facilities to tourists (Armenski *et al.*, 2012). There is a large variety of aspects, which could be difficult to apply to a destination if one is not aware of which aspects are specifically applicable to which type of destination. The aspects in Table 3.3 were applied to different destinations with different attributes and reputations. What might work for the one destination to be competitive, might not work for another, because the one destination might already be known for its entertainment or wildlife, which attracts the tourists whereas another destination is known to be the safest tourism destination and therefore attracts more tourists due to this. Therefore, as mentioned earlier, destination competitiveness is destination-specific.

Some of the factors in Table 3.3 were identified from a supply side and others from a demand side. Therefore a distinction was drawn between demand and supply side, but firstly the top 10 competitiveness factors were identified in Figure 3.6 before commencing with sorting the factors according to approaches.

3.3.3.1 Top ten identified competitiveness factors or aspects

The top ten identified competitiveness aspects depicted in Figure 3.6 were identified by looking at the aspects in Table 3.1 which were identified the most by the authors. The aspect **activities** was identified twenty-five (25) times and includes aspects such as water-based activities, nature-based activities, recreational activities as well as any other activities hosted by a destination. The second most frequently identified factor was **special events**, which was identified twenty-four (24) times. This factor includes aspects such as festivals that take place at a destination and attract local and foreign tourists to the destination for this reason. **Infrastructure** was identified twenty-two (22) times and includes aspects such as accessibility to infrastructure, quality of the railroad network at the destination, water supply facilities as well as the sanitation at the destination. The **quality of service factor** was also identified twenty-four (24) times, together with the safety factor. Quality of service refers to a destination's ability to provide services that enhance the visitor's experience at the destination. **Safety** includes the safety of visitors to the destination, overall safety and security of the destination. These factors were the top 5 most identified factors listed in Table 3.1.

The other factors/aspects which form part of the top ten identified competitiveness factors/aspects include **development** (hospitality development, human resources development, social development and position of destination), **environment management** (includes establishing environmental standards and attractiveness of environment), **shopping** (the availability of shopping facilities such as malls, value for money of shopping items), **information** which includes aspects such as the availability of tourist

information, visitor statistics, market segmentation studies as well as other research which could provide information to visitors on the internet for example. The last factor is **climate**, which refers to how warm or cold a destination is or even whether it is a rainy area. The following section divided the top ten most identified competitiveness aspects/factors of the articles in Table 3.2 into demand, supply or mixed side approach.

3.3.3.2 A Review of tourism competitiveness factors from different approaches

The top ten factors/aspects were further analysed by comparing the different approaches (demand, supply and mixed approach) with one another. A review of these approaches indicates that most of the researchers followed a Supply approach whilst determining the aspects/factors, followed by a demand approach and then a mixed approach.

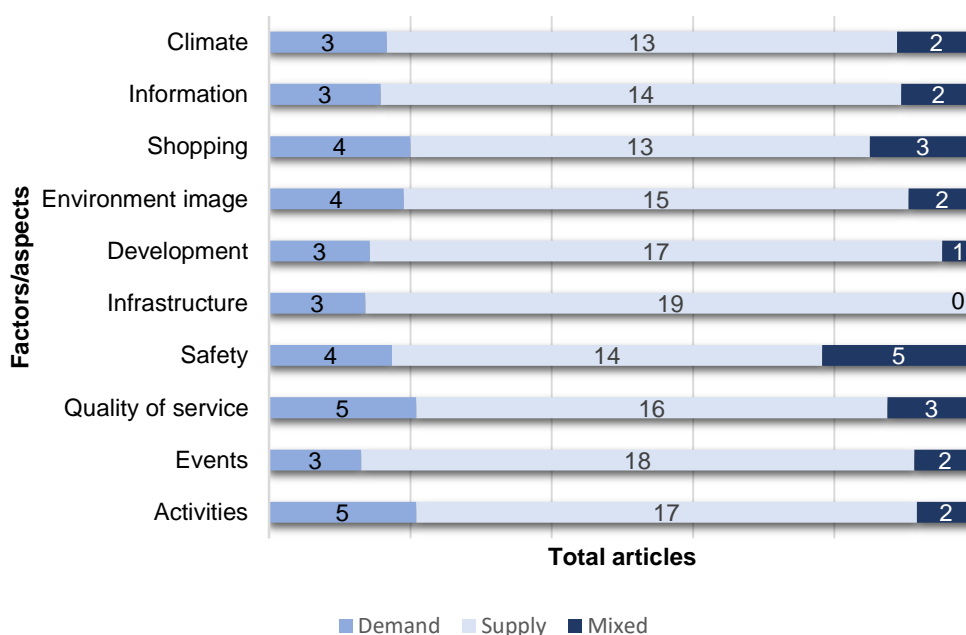


Figure 3.6: Top 10 competitiveness aspects identified from demand, supply and mixed approach

Figure 3.6 illustrates the analysis conducted on the top ten aspects/factors identified from all three approaches.

Top 10 Supply side competitiveness aspects

It is clear that most of the articles in the sample were conducted from a supply side. The aspect/factor infrastructure was identified the most, nineteen times (19) times which means that the tourism experts who formed part of the sample for these studies from a supply side indicated that the infrastructure of a destination is seen to be important. The second most identified aspect from a supply side was **events**, which was identified eighteen (18) times. This includes any events taking place at the destination such as festivals or even sport events. The activities and development aspects were identified seventeen (17)

times, followed by **quality of services** which were identified sixteen (16) times. The aspect **environment image** was identified fifteen (15) times, **availability of information** and **safety**, fourteen (14) times and **shopping** as well as **climate** thirteen (13) times respectively.

Top 10 Demand side competitiveness aspects

The aspects quality of service and activities were identified the most, five (5) times, in the demand side articles. This is followed by the aspects safety, environment image and shopping which were each identified four (4) times, respectively. The remaining aspects Events, Infrastructure, development, information and climate were identified three times, respectively. The articles that researched the tourism and destination competitiveness aspects or factors from a demand side were Dwyer *et al.* (2004), Kozak *et al.* (2009), Salman & Hasim (2012), Caber *et al.* (2012), Armenski *et al.* (2012) and Goffi (2013). It is interesting that some of the aspects that were identified in these studies, correlates with the supply side and mixed approach studies. However, the demand side studies elaborate more on the aspects that tourists will find important when visiting a destination, which includes more competitive than comparative advantages. The factors that were identified by most of the demand side include: Destination management and created resources or activities. Destination management includes aspects such as Government cooperation, Political commitment and Visitor satisfaction management. The factor created resources includes aspects special events, entertainment, nightlife and shopping. However, there are certain correlating factors between the demand side and mixed-approach.

Top 10 mixed approach competitiveness aspects

The mixed approach included both demand and supply side approaches to obtaining the information on the competitiveness aspects. The aspect which was identified the most, was the safety aspect. The safety aspect includes the safety of the destination and how safe the tourist will feel at the destination. It is interesting to observe that the safety aspect was not mentioned the most in the other two approaches, which could mean that each approach may focus on its own essential aspects. The aspects quality of service and shopping were each identified three (3) times in the sample articles, followed by the aspects events, activities, environment image, information and climate. The development aspect was only identified once, but the infrastructure aspect, which was seen as most important in supply side, is not identified once. The last three aspects, which were mentioned the least number of times in the articles focussing on supply approach were **shopping, information and climate**. Even though the aspects were not identified as much in this approach, in articles focussing on the other two approaches these aspects were not identified the least amount of times.

Therefore, from the different approaches (supply, demand and mixed approach) there are different opinions regarding the different aspects. From a supply-side approach, Infrastructure was mentioned the most in the sample articles, but from a demand point of view the aspects Quality of service and Activities were mentioned most frequently and the mixed approach indicated the Safety of a destination mentioned the most. This proves the lack of consensus of the competitiveness aspects according to different approaches and destinations.

3.4 Conclusion

Literature indicated that tourism competitiveness and its factors/aspects are essential and are more “industry specific” than other industries (du Plessis *et al.*, 2015:3). After having concluded this literature review it became evident that research on tourism or destination competitiveness can be conducted on different approaches and destinations (case studies). This must be taken into consideration while conducting research on this topic, seeing that the results differed from approach to approach and from destination to destination which then influenced the identified competitiveness aspects. Coupled with this, a large variety and number of competitiveness factors/aspects were identified by different authors, following different approaches and utilising different case studies. These studies had corresponding as well as different aspects that were identified. In terms of the corresponding factors/aspects that were identified most through this review, **activities, events, safety** and **quality of service** were the four factors that appeared in the top five of most identified competitiveness factors. The activity factor appeared in the top two of both the demand and supply factor as mostly identified. It is clear from this study that there are a large number of articles published on competitiveness, but there is an uneven distribution of the continents on which the case studies are based and the approaches used (demand vs supply).

This study contributes to literature by reviewing previous research that has been conducted on tourism or destination competitiveness and by analysing these articles according to different aspects. These contributions include a 1) analysis according to articles published in academic journals; 2) timeframe of the published articles that focus on tourism competitiveness; 3) journal articles on tourism competitiveness according to the continent of the case study; 4) journal articles conducted on tourism competitiveness from a demand or supply approach; 5) journal articles distributed regarding research focus; 6) research topics of the articles; 7). The information provided in this chapter could provide future researchers with an idea of the possible gaps in current tourism or competitiveness research as well as what already exists in terms of competitiveness factors.

CHAPTER 4: METHODOLOGY AND RESULTS CHAPTER

4.1 Introduction

In Chapter 3, a comprehensive literature review and analysis were conducted on all the previous research studies on tourism or destination competitiveness. Because the majority of the studies as portrayed in Chapter 3 focused on investigating and analysing competitiveness from the supply side, this study aimed to focus on perceptions of tourists (demand side) towards tourism and destination competitiveness. It was evident from the literature study reported on in Chapter 3 (c.f. Table 3.1) that research focusing on the demand side which could fill the gap in literature towards tourism competitiveness is lacking. It is important to conduct this research from the demand side seeing that there is a continuous growth in tourism, which means that more tourists hold their own opinions concerning what the factors are that contribute to the competitiveness of a destination.

This growth in tourist numbers resulted in increased competition between competing destinations (Iraqi, 2009:15). The most recent United Nations World Tourism Organization (UNWTO) and World Tourism Barometer signified that there had been a 7% growth in tourist arrivals in 2017 and this growth is expected to increase onwards annually. South Africa as a tourist destination also experienced an increase of 6% more tourist arrivals in the year 2017 (UNWTO, 2018:1). The visitation of present and potential tourists travelling to a destination is linked to the destination's competitiveness (Dwyer & Kim, 2003:369).

It is essential to investigate the competitiveness of the country and to establish the tourists (demand side) perceptions of competitive factors or aspects of a destination. This could assist DMOs (Destination Marketing Organisations), as well as other tourism organisations, in gaining knowledge of which aspects of a destination to focus when establishing a marketing strategy to compete globally. To reach this goal, Chapter 4 commence by explaining the method of research and providing the analysis and results of the data obtained. The results section was divided into two sub-sections, namely descriptive, exploratory.

4.2 Research design

This section explains the research process and includes the methods and tools for this study (Babbie & Mouton, 2001:75). There are known to be three traditional types of research designs used within empirical studies, namely descriptive research, exploratory research and causal research (McCallaghan, 2015:10). It is essential to use the correct research designs seeing that it initiates "smooth sailing" of the research (Kothari, 2004:36). The research design for this study is twofold. Firstly, a descriptive research design was chosen to obtain a general profile and travel behaviour of the tourists visiting South Africa, determine the aspects of competitiveness as well as to conduct a temporal analysis of the competitiveness aspects and strengths and weaknesses of South Africa. Secondly, an exploratory research design was additionally followed by conducting a factor analysis so that the researcher could investigate the factors contributing to South Africa's competitiveness from a demand side. The data for this study was collected by means of questionnaires at OR (Oliver Tambo) International Airport in Johannesburg during two different surveys; a winter and a summer survey.

4.3 Research methodology

Research methodology is the process of explaining the scientific methods and procedures followed to explore unexplained phenomena (Leedy & Ormrod, 2005:146). The following section comprises the development of the questionnaire utilised in this study, population and sample, and the data analysis. The first part of the discussion explains how the questionnaire was developed as well as the questions that were posed. The population and sample involves describing the respondents who participated in the survey of this study. This is followed by the data analysis which is divided into two parts, namely descriptive and exploratory.

4.3.1 Development of a questionnaire

Before commencing with obtaining new information regarding a specific topic, it is first important to study literature to determine what information could be obtained from other studies (Nardi, 2015:71). Therefore Chapters 2 and 3 of this study focussed on the literature previously conducted on tourism and destination competitiveness. Research conducted by du Plessis (2002), Porter (1990), Ritchie and Crouch (1993), and van der Merwe (2015) were used to compile the questionnaire of this study. The reason these studies were used, is because the questionnaire for this study needed to be similar to those of du Plessis (2002) and van der Merwe (2015) in order to compare the studies with each other. McCuster and Gunaydin (2015:30) proclaim that tools such as questionnaires could assist in facilitating the accuracy of measuring and evaluating set objectives, such as those set in Chapter 1. It is essential to firstly plan before compiling a questionnaire, seeing that a “poorly planned and designed questionnaire will not give good data” (Pallant, 2016:7).

This questionnaire contained both structured and unstructured questions. Structured questions included those questions that have fixed answers such as selecting between given options (Male or Female), and unstructured questions included the respondent’s own opinion (Kothari, 2004:101). It also included a 5-point Likert scale on which the respondents needed to indicate the level of importance of the competitiveness aspects indicated on the questionnaire. The unstructured questions included those questions to which respondents had to give their own opinion on the questions such as asking what the respondent’s memorable experience was in South Africa.

The questionnaire comprises two sections:

Section A: Demographic profile that includes questions such as gender, year of birth, country of residence, reasons for visiting, annual gross income, reasons for visit, duration of visit, reason for visit and attractions visited. This section aims to provide a basic profile of the respondents who completed the questionnaires.

Section B: focussed on the factors contributing to competitiveness of South Africa as a tourist destination based on the research conducted by du Plessis (2002), Porter (1990), Ritchie and Crouch (1993) and van der Merwe (2015). The respondents were requested to rate the importance of the listed aspects towards global destination competitiveness by choosing one of the options on the provided Likert scale (where ‘1’= not competitive at all and ‘5’= extremely competitive). The next part of section B consisted of the strengths

and weaknesses of South Africa. Respondents were also asked to indicate whether they consider these provided aspects as strengths or weaknesses of South Africa. The same aspects in the previous section were used to determine the strengths and weaknesses of South Africa. The reason for this is because, even though the respondents indicated a competitiveness aspect to be important for global competitiveness, it would not necessarily be a strength of South Africa.

4.3.2 Population and Sample

The sample of a study is referred to as a fraction of a population (Tailor, 2005 as cited by Etikan *et al.*, 2016:1). Quantitative studies are known to have larger sample sizes than qualitative studies, and it is essential to make the right decision as to how many respondents is needed to be part of the survey (Quick & Hall, 2015:195). Sampling allows the researcher to draw conclusions regarding the overall population (Yu & Cooper, 1983:36). The population of this study comprises outbound tourists such as those who had travelled from foreign countries to South Africa and those that are eighteen (18) years or older. Respondents who were just entering South Africa at OR Tambo International Airport and did not see much of the country yet, were not considered for this study. These could be any foreign tourists, whether they were in South Africa for business or leisure purposes. The field workers had access to most sections in OR Tambo International airport and asked any foreign tourists who fit the specific requirements of the population to fill in the questionnaire. There were 650 questionnaires distributed in which in total 619 completed questionnaires were obtained. Seeing that this is a quantitative study, it is recommended for a population (N) of 1 000 000 individuals the sample size should be 384 in order for the study to be representative (Krejcie & Morgan, 1970:2). In this case the actual amount of tourists to South Africa was unknown, therefore the sample size for this study was 619 respondents, which is representative. The questionnaires were distributed during different times of the year with a view to obtain a more objective opinion and profile of the respondents. Table 4.1 indicates that the first set of questionnaires, distributed between July and October, includes 312 questionnaires and the second set of questionnaires distributed between December 2017 and January 2018 included 307 questionnaires. In other words, both the winter (out of season) and summer (in-season) markets of South Africa were captured when distributing the questionnaires in the different timeframes.

Table 4.1: Distribution of questionnaires according to timeframe and total

Time frame	Total questionnaires
July-October 2017	312
December 2017-January 2018	307

Source: author's own compilation

A non-probability sampling method was undertaken to distribute these questionnaires because not all the participants were given equal opportunities of being included in the study while gathering the data (Etikan *et al.*, 2016:1). It simply is impossible to distribute questionnaires to every respondent of the target population who meets the requirements of the study at the airport (Dörnyei, 2007 as cited by Etikan *et al.*, 2016:1). Etikan *et al.* (2016:1) state that it would be ideal to use the entire population (every foreign tourist

travelling back to their home country), but most of the time it is not possible. The field workers did not have a list of the entire population at the Airport which could be randomly chosen from and therefore, only approached respondents that were the most convenient to ask due to the large population. Reasons for using a convenience sampling is that they are “affordable, easy and the subjects are readily available” (Etikan *et al.*, 2016:2) – the population elements therefore are easily and conveniently available.

4.3.3 Data analysis

Microsoft Excel© was used for capturing the data, and it was analysed using SPSS Version 25 (2018). This analysis forms part of the descriptive analysis and was followed up by exploratory analysis. The researcher gathered the data by using frequency tables as well as figures. The data analysis was divided into two parts, namely:

4.3.3.1 Descriptive analysis

According to Kothari (2004:36), descriptive research studies are those that describe the characteristics of individuals or groups. In other words, it illustrates the data to show what the data looks like (Leedy & Ormrod, 2005:146) – it gives an accurate description of the situation. When conducting descriptive research, the researcher aims at drawing conclusions or making statements on the specific population at hand (Kothari, 2004:36). Section 4.4.1 contains the results of demographic profile and travel behaviour. This section was formulated by using the questions on the questionnaire and the results obtained from each question to place the data in tables and figures to illustrate it better. This is followed by sections 4.4.1.2 and 4.4.1.3 which includes the aspects of tourism competitiveness and the temporal analysis, distinctively. Furthermore, the means and standard deviations (descriptive statistics) were calculated in order to determine the importance of the competitiveness factor of South Africa.

4.3.3.1.1 Demographic profile and travel behaviour

ACAPS (2014:4) explains that “demography is the quantitative study of populations.” It is essential to obtain information on the gender, age and location (country of residence) of respondents (ACAPS, 2014:3).. The respondents of this survey travelled for different reasons and this is confirmed by Curtis and Perkins (2006:7) who state that tourists travel for different purposes such as for work. Therefore, determining the demographic profile assists in understanding the travel behaviour of the respondents. This information also gives clarity to the researcher as to which type of tourist indicated which competitiveness aspects to be important.

4.3.3.1.2 Aspects of tourism competitiveness

The aspects of competitiveness section is twofold because it includes the aspects as well as the strengths and weaknesses of South Africa. Tourism aspects or factors have been researched by several researchers such as Blanco-Cerradelo, *et al.* (2018),, Enright and Newton (2004) and Kozak *et al.* (2009). However, these competitiveness aspects or factors were determined from a supply side, meaning that the

respondents were tourism stakeholders. As seen in Chapter 3, not much research has been conducted on tourism competitiveness aspects or factors from a demand side. Hence, this study strived to determine the competitiveness aspects from the tourist's side. Thereafter, the strengths and weaknesses of South Africa were also determined.

4.3.3.1.3 Temporal analysis

Revyakin *et al.* (2003:557) explain that a temporal analysis refers to the creation of a timeline, which provides a clearer view of how things have changed or stayed the same over time. In other words, a temporal analysis is a comparison over a certain period. In this case the comparison was between the competitiveness aspects of South Africa in 2002, 2015 and then in 2018. These aspects were also investigated from different approaches. In 2002 and 2015 the competitiveness factors or aspects of South Africa were conducted from a supply side and in 2018 (this current study) it was researched from a demand side. These aspects are therefore compared with one another based on the different years (periods as well as the different approaches of the studies). It is important to examine these results of different periods to show DMOs and other tourism stakeholders which aspects are essential for South Africa's competitiveness and that it remains important or not, even though the years have passed. Different internal and external elements have an influence on the competitiveness of a country which can have an effect over time. An example of this could be the 2010 FIFA World Cup, which happened after the study had been conducted by van der Merwe (2015). This event had a huge effect on South Africa's competitiveness. It is clear that time can influence opinions; therefore a temporal analysis could shed light on how the opinions of the respondents of 2002, 2015 and 2018 differ over time.

After the analysis of the aspects according to the different years and approaches, the strengths and weaknesses of South Africa were analysed. The strengths and weaknesses as identified by du Plessis (2002) and by van der Merwe (2015) as well as those of this study were again compared with one another to compare the differences and similarities with one another.

4.3.3.2 Exploratory analysis

The exploratory analysis was utilised by conducting a factor analysis on the factors contributing to tourism destination competitiveness of South Africa. According to Fabrigar, Wegener, MacCallum and Strahan (1999:272), an exploratory factor analysis is referred to as one of the most generally used statistical procedures in especially social sciences research. This analysis has the primary purpose of creating a problem or finding one that needs investigation (Kothari, 2004:35), in other words, this problem needs to be explored.

4.3.3.2.1 Factor analysis

"The main goal of a factor analysis is to establish the number and nature of factors that account for the variation among a set of indicators" (Brown & Moore, 2012:361). A factor analysis therefore is a statistical method used to discover hidden variables and then provides clearance of the variable among others

(Albright, 2006:1). Kline (1994:3) states that a factor analysis includes a variety of statistical techniques which are used to simplify difficult sets of data. While conducting a factor analysis the aim is to summarise large sets of data in groups or categories (Pallant, 2016:182). There are two main approaches to a factor analysis called exploratory and confirmatory factor analysis (Pallant, 2016:182). For purposes of this study, an exploratory factor analysis was conducted instead of confirmatory factor analysis. Pallant (2016:182) indicates that exploratory factor analysis is the gathering of information regarding the interrelationships among a set of variables. This analysis is a generally used statistical technique in especially social sciences (Costello & Osborne, 2005:1). With a confirmatory factor analysis the researcher utilises theory or/and empirical research to test the hypothesis statistically (Suhr, 2006:1). This analysis could apply when a researcher merely wants to review current results/research to confirm that the results are correct (Suhr, 2006:1).

The reason for using factor analysis for this study is to group or summarise the thirty-two (32) competitiveness aspects together to form groups (factors) that could better represent these aspects regarding its importance to the respondents.

4.4 Results

Based on the survey as discussed above, the following results were obtained. The results are divided into two sections: section one contains the descriptive results, which also include demographic profile and travel behaviour, aspects of competitiveness and the temporal analysis, and section two includes the exploratory analysis which comprises the factor analysis.

4.4.1 Descriptive results

The descriptive results are divided into three parts, namely Section A: demographic profile and travel behaviour, aspects of competitiveness and the temporal analysis.

4.4.1.1 Demographic profile and travel behaviour

This section included specifically the demographic information such as gender and age as well as the travel behaviour of the respondents such as their reason for visit.

4.4.1.1.1 Gender

Respondents were requested to indicate their gender by choosing one of the given options: Male or Female. Figure 4.1 indicates that fifty-four percent (54%) of the respondents were **male** whereas the rest, forty-six percent (46%), were **female**.

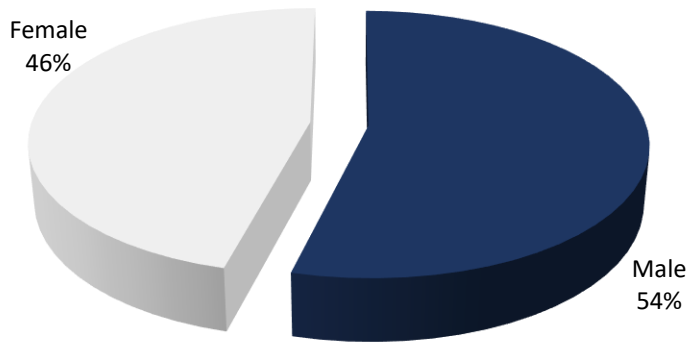


Figure 4.1: Gender of respondents

Therefore, it is clear from Figure 4.1 that the majority of the respondents in this study were male.

4.4.1.1.2 Year of birth

In this question, respondents were asked to indicate the year in which they were born by filling in their year of birth in the space provided. The researcher grouped the results in categories (groups of 10 years). Table 4.2 shows that thirty-four percent (34%) of the respondents were born between **1980** and **1989**, meaning they are between ages 29 and 38 years. Five-percent (5%) out of the thirty-two percent (32%) were born between **1985** and **1987**. This is followed by 22% who were born between **1990** and **2000** (age 18 to 28). The age groups that were born between **1970** and **1979** (48-39) and **1960** and **1969** (47-56) were represented by twenty-one percent (21%) and fourteen percent (14%), respectively.

Table 4.2: Year in which respondents were born

Year of birth	Percentage	Age (years)
1940-1949	4%	69-78
1950-1959	5%	59-68
1960-1969	14%	49-58
1970-1979	21%	39-48
1980-1989	34%	29-38
1990-2000	22%	18-28

On average, the respondents of this study were 39.21 years of age.

4.4.1.1.3 Country of residence

In this question, respondents were asked to indicate their country of residence by signifying the country in the space provided.

Table 4.3: Country of residence

Country	Percentage
Argentina	3%
Brazil	15%
Canada	4%
France	3%
Kenya	3%
United States	10%
Zimbabwe	3%

As reflected in Table 4.3, fifteen percent (15%) of the respondents listed **Brazil** as their country of residence. This is followed by 10% that indicated originating from the **United States of America**, four percent (4%) from **Canada** and three percent (3%) from **Argentina, France, Kenya** as well as **Zimbabwe**, respectively. The following countries were represented by two percent (2%): Germany, India, Italy, Japan, Mexico, Tanzania, United Kingdom and Zambia. The following countries were represented by one percent (1%) of the respondents, respectively: Angola, Austria, Australia, Bangladesh, Belgium, Botswana, Chile, China, Congo, Denmark, Dominican Republic, England, Ethiopia, Ghana, Haiti, Hong Kong, Iceland, Jamaica, Lebanon, Madagascar, Malawi, Malaysia, Mozambique, Namibia, Netherlands, North Korea, Pakistan, Qatar, Saudi Arabia, Scotland, Seychelles, Singapore, South Korea, Spain, Sudan, Sweden, Switzerland, Syria, Taiwan, Thailand, Turkey, Uganda and Uruguay.

Table 4.4: Continent of residence

Continent	Percentage
Asia	19%
Africa	22%
South America	20%
North America	19%
Europe	19%
Australasia	1%

Table 4.3 indicates the summary per continent. Twenty-two percent (22%) of the respondents travelled from the **African continent** (Angola, Botswana, Congo, Ethiopia, Ghana, Kenya, Madagascar, Malawi, Namibia, Tanzania and Zimbabwe), **South America** (20%) which includes countries such as Brazil, Chile and Uruguay. Nineteen-percent of the respondents were from **North America** (Canada, Dominican Republic, Haiti, Jamaica, Mexico and United States of America), **Asia** (Bangladesh, China, Japan, Lebanon, Malaysia, North Korea, Pakistan, Qatar Saudi Arabia, Singapore, South Korea, Syria, Taiwan, Thailand, Turkey) and **Europe** (Austria, Belgium, Denmark, England, France, Germany, Iceland, Netherlands, Scotland, Sweden, and Switzerland) (19%), respectively and one percent (1%) of the respondents were from **Australasia**.

4.4.1.1.4 Frequency of visits to South Africa

Respondents were asked to state how often they visit South Africa, by choosing one of the provided options on the questionnaire, such as *first visit*, *annually*, *every second year*, *every third year* as well as the option to provide other answers.

As seen in Figure 4.2, forty-nine percent (49%) specified that this was their **first visit** to South Africa. This is followed by twenty-one percent (21%) who visit South Africa annually. Fifteen percent (15%) of the respondents indicated that it was either their **second** or **third time** visiting South Africa, which was not necessarily in frequency of **every second year** (7%) and **every third year** (7%).

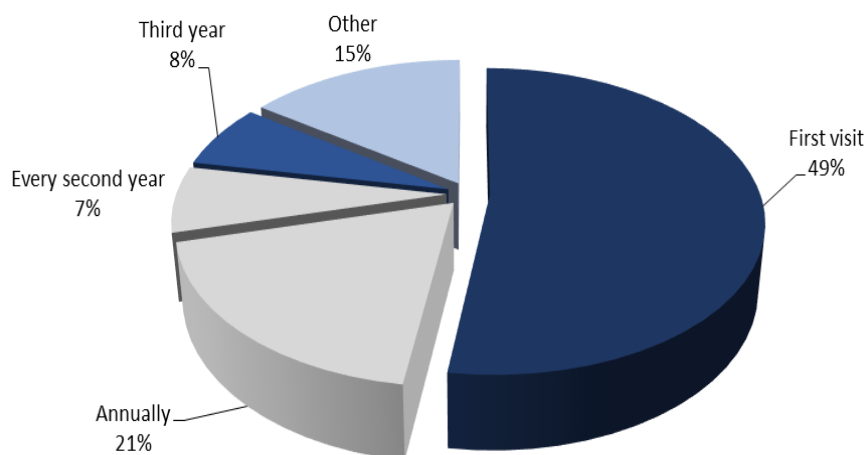


Figure 4.2: Frequency of visits to South Africa

4.4.1.1.5 Companion travel of respondents

In this question, respondents were asked to indicate with whom they were travelling while visiting South Africa as indicated in Table 4.5. These options included: Individually, group of friends, friend, partner, spouse, colleagues or other options. Thirty-six percent (36%) of the respondents **travelled alone**, followed by 17% travelling with a **group of friends**, fourteen percent (14%) travelled with their **spouse** and thirteen percent (13%) with their partner. Ten percent (10%) of the respondents indicated the “**other**” option, specified travelling with family, school/ student groups, undergoing training. Eight percent (8%) of the respondents travelled with **colleagues** to South Africa.

Table 4.5: Companion travel of respondents

Travelling with	Percentage
Individually	36%
Group of friends	17%
Friend	8%
Partner	13%
Spouse	14%
Colleagues	8%
Other	10%

The percentages do not add up to 100% because the respondents could choose more than one option.

4.4.1.1.6 *Type of tourist*

Respondents were asked to indicate the type of tourist they consider themselves to be, by choosing one of the options provided as shown in Figure 4.3 provided. Thirty-four percent (34%) classified themselves as **adventure tourists**. This is followed by respondents reporting that they are **leisure tourists** (28%), **business tourists** (23%), **other** (11%) and **eco-tourists** (5%). Some of the answers of respondents who indicated other include the visitation of family, culinary training or for a funeral, to name but a few. In du Plessis' (2002) study the results showed that the fourth highest percentage of tourists were adventure tourists, which clearly differs from this study. This study also showed that the third highest percentage of tourists indicated to visit South Africa for eco-tourism. Therefore it is clear that since 2002 the tourists' top reason for visiting South Africa differed. However, adventure tourism remained in the top five reasons, why people travel to South Africa, in both of these studies.

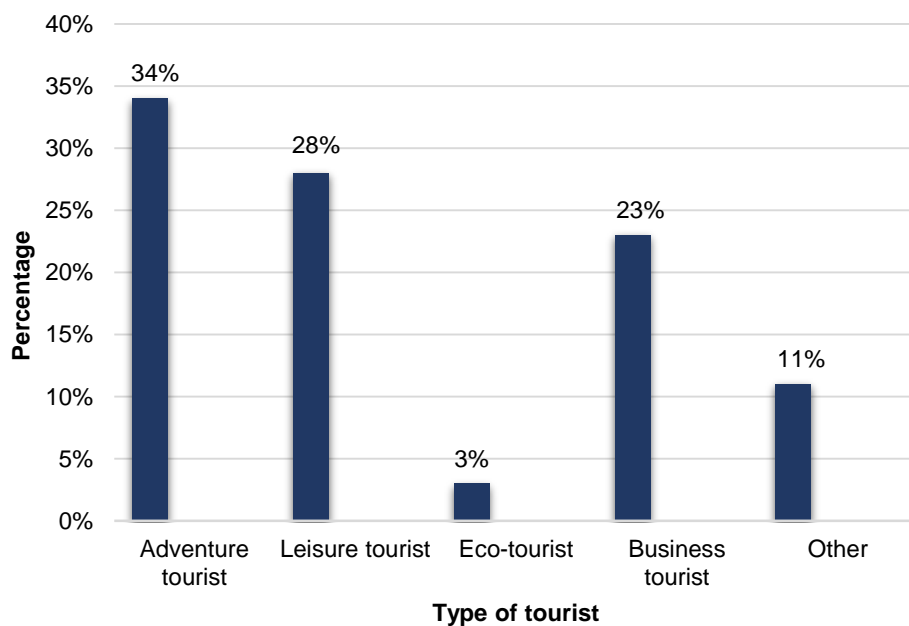


Figure 4.3: Type of tourists visiting South Africa

The South African Tourism Report (2016:11) predicted that South Africa will continue to attract business tourists to the destination, which correlates with the results in Figure 4.3.

4.4.1.1.7 *Spending behaviour while visiting South Africa*

In this question, respondents were requested to estimate how much they spent while visiting South Africa by specifying the amount, alongside the provided categories. These categories included accommodation, transport, sight-seeing tours/admission to attractions, food and beverages, package tours, souvenirs, shopping and other. These totals were then calculated to obtain the averages for each category of spending, as illustrated in the Figure 4.4 below. The average spending on accommodation is R7339.76

(43% of the total spending was for accommodation). **Transport** (excluding airline tickets) R2,345.19 (14%), **food and beverages** R2,922.06 (17%) as well as **package tours** R1,366.32 (8%). Only an average of R450.44 (3%) was spent on **other expenses**, but the respondents did not specify.

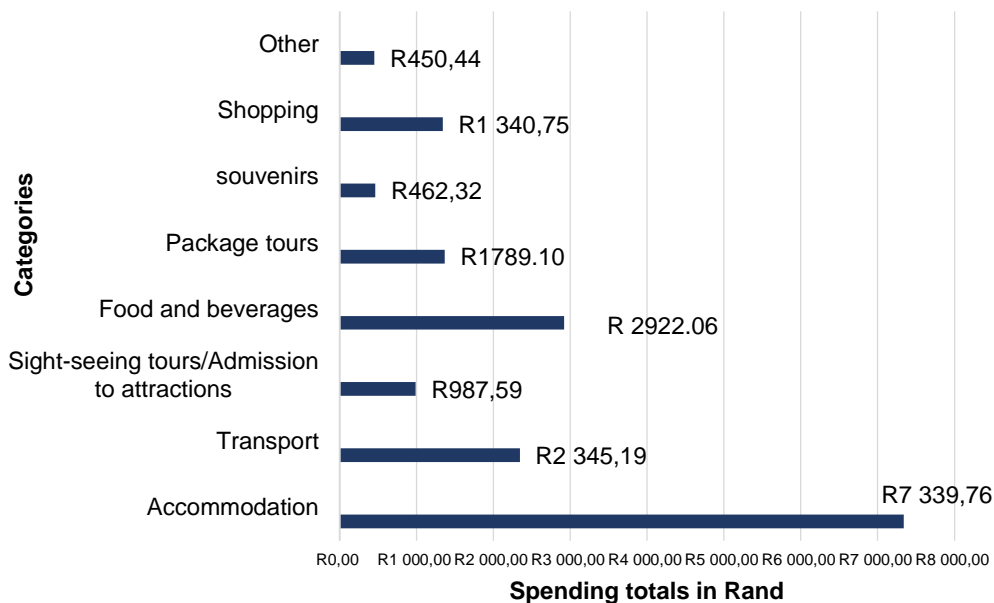


Figure 4.4: Spending behaviour of respondents while visiting South Africa

The total spending of the respondents was R17,214.44 per trip for an average of 24 days (As indicated in 4.4.11).

4.4.1.1.8 Price competitiveness of South Africa as a tourist destination

Respondents were requested to indicate the level of competitiveness of South Africa's prices with regard to certain provided categories. The price categories were listed in the form of a Likert scale (where '1'= not competitive at all and '5'= extremely competitive). To provide a better reflection of the results, the mean value (M) and standard deviation (SD) of each aspect were indicated. To provide a better perspective of the results, levels 4 (very competitive) and 5 (extremely important) of the Likert scale were combined in the discussion of the results. These results show that South Africa's **attractions** (Mean value=3.80; SD=±0.929), were regarded as the most competitive based on the mean value followed by **food and beverages** (Mean value=3.78; SD=±0.942), **accommodation** (Mean value=3.67; SD=±0.929) and **other aspects** (Mean value=3.73; SD=±0.928) Respondents who specified other price aspects included tour packages and clothes. It is clear from Table 4.6 that the majority of the respondents find South Africa's prices of attractions as well as food and beverages extremely competitive with other tourism destinations such as those listed in Table 4.7.

Table 4.6: Competitiveness of South Africa's prices

Aspect	1. Not competitive at all	2. Somewhat	3. Competitive	4. Very competitive	5. Extremely competitive	Mean value	Std. Deviation
Accommodation	2%	8%	30%	41%	19%	3.67	0.929

Aspect	1. Not competitive at all	2. Some- what	3. Competitive	4. Very competitive	5. Extremely competitive	Mean value	Std. Deviation
Transport (Airline)	3%	11%	32%	38%	16%	3.52	0.990
Transport	3%	12%	32%	40%	14%	3.49	0.961
Food and beverages	2%	6%	27%	42%	23%	3.78	0.942
Attractions	2%	7%	26%	42%	23%	3.80	0.929
Souvenirs	6%	12%	32%	32%	18%	3.45	1.090
Other	1%	7%	30%	40%	21%	3.73	0.928

Dwyer *et al.* (2000:21) argue that it is very valuable for a destination to determine the price competitiveness of elements such as accommodation, food and drinks as well as shopping and entertainment because this information can assist in the productivity at a destination. The results in Table 4.6 concur with those reported in the study of Haarhoff (2007) in which South Africa's food and beverages as well as attractions seemed fairly priced or even cheaper compared to those of other destinations such as Australia and Thailand.

4.4.1.1.9 *Country's prices compared to other destinations*

The following question: Which country did you compare these prices with, was a follow-up of the preceding question. These countries that the respondents indicated were placed in Table 4.7 below. Eight-percent (8%) of the respondents compared South Africa's price competitiveness with **United States of America**. This is followed by seven percent (7%) who made the comparison with **Brazil** and three percent (3%) compared the prices with **Argentina**. Seventeen-percent (17%) of the respondents did not respond to this question.

Other countries that were mentioned by respondents at one percent (1%) include: Australia, Austria, Columbia, Congo, Cuba, Dubai, Ethiopia, France, Germany, Ghana, Hungary, Indonesia, Lebanon, Libya, London, Madagascar, Malawi, Malaysia, Mauritius, Mexico, Mozambique, Netherlands, New York, North Korea, Pakistan, Russia, Saudi Arabia, Seychelles, South America, Spain, Thailand, Turkey, Uruguay, Zambia respectively.

Table 4.7: Countries with which respondents compared South Africa's prices

Country	Percentage	Country	Percentage
Argentina	3%	Kenya	3%
Botswana	2%	Namibia	2%
Brazil	7%	Spain	1%
Canada	2%	Tanzania	2%
China	2%	Uganda	2%
England	2%	UK	2%
Hong Kong	2%	Zimbabwe	2%
India	3%	Europe	17%
No response	2%	United states	8%

Overall, together with the list of African countries mentioned in the paragraph above, twenty-two percent (22%) of the respondents compared South Africa's prices with African countries.

4.4.1.1.10 *Heard about South Africa*

Respondents were asked to indicate where they had heard about South Africa as a tourist destination by ticking the boxes provided (see Table 4.8 below). Fifty-three percent (53%) of the respondents heard through **friends and family** and twenty-three percent (23%) were influenced to revisit South Africa through **previous visits**. This is followed by twenty percent (20%) who were informed by **SA Tourism Website** and 12% through **websites other than SAT** (South African Tourism). In other words, word of mouth remains the most important way by means of which people are informed about South Africa as a tourist destination.

Table 4.8: Platforms respondents heard about South Africa

Source of information	Percentage
a) SA Tourism Website	20%
b) Websites other than SAT	12%
c) Friends and family	53%
d) Radio	2%
e) Television	10%
f) Magazine	10%
g) Previous visits	23%
h) Facebook	10%
i) Twitter	3%
j) Other (please specify)	11%

This question's results do not add up to 100% as the respondents could tick "yes" to more than one question.

4.4.1.1.11 Duration of visit to South Africa

In this question, respondents were asked to indicate the length of their stay in South Africa by writing down how many days they had spent in the country as indicated in Table 4.9. These totals were then divided into groups of seven (7) days in which the percentages of the total group were calculated. Thirty-four percent (34%) of the respondents spent between **eight and fourteen** days in the country. This is followed by thirty-one percent (31%) who visited the country between **one and seven days** and seventeen percent (17%) who stayed in South Africa between **15 and 21 days**. It is clear that the majority of the respondents (65%) stayed between one and two weeks.

Table 4.9: Duration of respondents' visit to South Africa

Duration of visit (days)	Percentage (%)
1-7 days	31%
8-14 days	34%
15-21 days	17%
22-28 days	3%
29-35 days	6%
36-42 days	1%
43-49 days	1%
50-56 days	0%
57-64 days	2%
More than 2 months	5%

The majority of the visitors (65%) stay no longer than two weeks with an average of 24 days.

4.4.1.1.12 Person/persons who initiated the visit to South Africa

Respondents were instructed to indicate who initiated the visit to South Africa by choosing between the options provided: self, friends, spouse, family, business and/or other. As indicated in Table 4.10, thirty-seven percent (37%) of the respondents stated that they initiated the visit to South Africa **themselves** and nineteen percent (19%) who suggested their **friends** initiated the visit. This is followed by eighteen percent (18%) of the respondents whose company they work for (**business**) initiated the visit and fourteen percent (14%) of the respondents suggested their **family** motivated them to visit South Africa.

Table 4.10: Person who initiated the visit to South Africa

Who initiated the visit?	Percentage (%)
Self	37%
Friends	19%
Spouse	10%
Family	14%
Business	18%
Other	9%

The respondent could pick more than one of the given options; therefore, the percentages do not add up to 100%.

4.4.1.1.13 Reason for visit

Respondents were requested to indicate their reason for visiting South Africa by choosing one of the given options of tourism types provided. The type of tourism options listed was in the form of a Likert scale (where '1'= strongly disagree and '5'= strongly agree). To provide a better reflection of the results, the mean value (M) and standard deviation (SD) of each reason was calculated.

Table 4.11: Reason for visiting South Africa

Reason	1. Strongly disagree	2. Disagree	3. Neutral	4. Agree	5. Strongly Agree	Mean value	Std. Deviation
Sport tourism	20%	14%	26%	24%	17%	3.03	1.355
Culture and history	7%	9%	20%	34%	30%	3.73	1.175
Ecotourism	10%	13%	24%	23%	31%	3.52	1.310
Wedding tourism	35%	14%	20%	12%	19%	2.67	1.522
Adventure tourism	9%	7%	17%	30%	38%	3.82	1.249
Hunting tourism	42%	15%	13%	18%	12%	2.42	1.468
Business tourism	26%	7%	18%	15%	33%	3.23	1.598
Culinary tourism	22%	10%	28%	23%	17%	3.02	1.381
Leisure tourism	9%	5%	14%	28%	45%	3.96	1.246
Other	12%	7%	17%	15%	50%	3.85	1.406

Based on the mean values, it is clear that **leisure tourism** (M=3.96; SD=±1.246) was seen as the most important reason why people visited South Africa. The results indicated that numerous respondents' reason for visiting South Africa was for **other** reasons such as visiting family, missionary or visiting churches or visiting the country for work/training (Mean value-3.85; SD=±1.406) and **adventure tourism** (Mean value-3.82; SD=±1.249), which correlates with du Plessis' (2002:81) study. In du Plessis' study, it is confirmed that the tour operators (respondents) of that study indicated that the third most tourists visiting South Africa are adventure tourists. This is followed by **Culture and history** (Mean value-3.73; SD=±1.175).

4.4.1.1.14 Attractions visited by respondents

In this question, respondents were provided with different options (attractions within South Africa) to choose from in the form of a Likert scale as indicated in Table 4.12. The respondents were then asked to indicate which of these attractions they visited while in South Africa by selecting yes (4) or no (3) or one of the following options: '1'=Did not have the time, '2'= Not aware of the attraction). Respondents could however only choose one option from the choices as provided.

Table 4.12: Attractions of South Africa visited by respondents

	1. Did not have the time (%)	2. Not aware of attraction (%)	3. No (%)	4. Yes (%)
Attraction				
Cape Point Nature Reserve	21%	5%	30%	43%
Pilanesberg Game Reserve	26%	9%	49%	16%
Cango Caves	25%	12%	50%	13%
Madikwe Game Reserve	28%	12%	52%	7%
Addo Elephant Park	26%	11%	52%	10%
Gold Reef City	22%	11%	47%	21%
Bloukrans bungee	24%	13%	54%	9%
Ukutla Lion Park (North-West)	25%	15%	50%	11%
Sun City and Lost City	23%	9%	42%	27%
Kruger National Park	21%	3%	33%	43%
Apartheid Museum	22%	6%	40%	32%
Taung Heritage site	27%	14%	52%	6%
Cape Vidal	27%	12%	50%	11%
Hartbeespoortdam	25%	15%	49%	12%
Lesedi African Lodge and Cultural Village	26%	15%	50%	10%
uShaka Marine World	25%	14%	48%	13%
Elephant sanctuary	27%	12%	50%	11%
God's Window	22%	11%	44%	23%
St Lucia Estuary/iSimangaliso	26%	11%	50%	12%
Maropeng	25%	13%	51%	11%
The Drakensberg	24%	11%	47%	18%
Blyde River Canyon	25%	11%	48%	16%
Table mountain	16%	3%	29%	53%
Cradle of Humankind	23%	11%	50%	17%

Fifty-three percent (53%) of the respondents indicated **Yes** for visiting Table Mountain, forty-three percent (43%) visited Kruger National Park as well as Cape Point Nature Reserve, respectively. The attractions that were visited by the least number of respondents, shown in Table 4.12, which answered **No** were: Bloukrans Bungee (54%), Addo Elephant Park and Madikwe Game Reserve (52%), Cango Caves (50%), Pilanesberg (49%). Fifteen percent (15%) respondents were not aware of Hartbeespoort dam as well as Lesedi African Lodge and Culture Village and fourteen percent (14%) **did not know** of uShaka Marine world. Respondents indicated **not having time** for Madikwe Game reserve (28%), Taung Heritage site, Cape Vidal and Elephant sanctuary (27%) as well as Pilanesberg Game Reserve 26%, Addo Elephant Park and Lesedi African Lodge and cultural village (26%), respectively. Seeing that forty-three percent (43%) of the respondents indicated visiting Kruger National Park, this correlates with research conducted by van der Merwe (2015:56) which indicates that one of the biggest draw cards of South Africa is the National Parks. The attractions the respondents indicated not being aware of can be seen as opportunities

for future marketing of the destination so that tourists can become aware of the attractions before visiting the destination.

4.4.1.1.15 *Other reasons why respondents did not visit the listed attractions*

This question is a follow-up of the previous question, an open-ended question. Respondents were asked to provide other reasons, in the space provided, for not visiting the attractions listed in the previous question. Only 261 out of the 619 respondents provided an answer to this question. The reasons provided by the respondents were then divided into categories as seen in Table 4.13 below. Not all the answers were indicated in Table 4.13 seeing that those results only represented one percent (1%), two percent (2%) or three percent (3%) of the results.

Table 4.13: Other reasons why respondents did not visit listed attractions

Reason	Percentage
Not enough time	54%
Did not know	5%
Business (no time for site-seeing)	9%
Not in area of listed attractions	6%
Visited other attractions	7%

It was clear from Table 4.13 that 54% of the respondents again mentioned that they **did not have enough time** and that is why they did not visit these listed attractions. This is followed by nine percent (9%) of the respondents who stated that they were in South Africa for **business reasons** and did not have the time to travel as much. Seven percent (7%) of the respondents indicated that they visited **other attractions** such as Kariega Game Reserve, Gold Reef City, God's Window and Botswana attractions.

4.4.1.1.16 *Memorable experience*

Respondents were requested to convey their opinion of their most memorable experience in South Africa during their visit. This was an open-ended question asking respondents to write the answer in the space provided. The answers were then divided into categories, as listed below in Table 4.14. Only the larger percentages were reported in Table 4.14.

Table 4.14: Memorable experiences of respondents

Memorable experience	Percentage
Kruger National Park	13%
Table Mountain	7%
Cape Town (attractions)	13%
Safari/See animals/Wildlife (Big 5)	11%
Other attractions in South Africa	12%

Thirteen percent (13%) of the respondents indicated the **Kruger National Park** as being a memorable experience as well as **Cape Town attractions**. Other reasons as indicated by the respondents include attending a wedding, visiting townships as well as Bungee jumping. Eleven percent (11%) stated that going

on a **safari** or observing wildlife was an unforgettable experience. There were some respondents (7%) that indicated **Table Mountain** as their memorable experience when visiting South Africa.

4.4.1.1.17 *Return to South Africa*

Respondents had to indicate whether they will return to South Africa after their visit to the country, by ticking “yes” or “no” in the box provided.

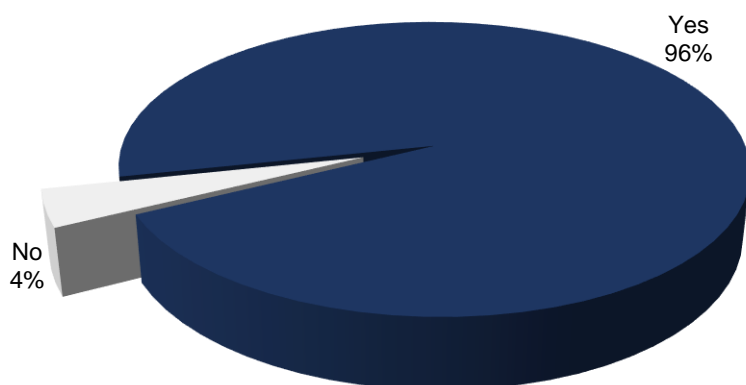


Figure 4.5: Return visitation

The results shown in Figure 4.5 indicate that ninety-six percent (96%) of the respondents stated that they **would like** to return South Africa and only four percent (4%) reported **no**.

4.4.1.1.18 *Reasons for returning to South Africa or not*

Respondents were asked to provide reasons for returning or not returning to South Africa. This was an open question where the respondents could write their answers in the space provided. Twenty-nine percent (29%) of the respondents indicated that South Africa is a **fantastic/amazing country** and would like to return. This is followed by thirteen percent (13%) who stated that they **did not see everything yet**, and would like to return to see more attractions and nature-related aspects which correlates with the previous section where respondents indicated that they did not have time to visit all the attractions. On the other hand, some respondents indicated they would not like to return because two percent (2%) perceive South Africa as **unsafe** with a **crime rate** that is too high.

Table 4.15: Reasons for returning

Reason for returning	Percentage (%)
Amazing country	29%
Did not see everything yet	13%
Business	7%
The great people	5%
Reasons for not returning:	Percentage

Not safe	2%
Crime	2%

It is clear that Safety is a contributing factor when considering a visit to a country or returning (Prideaux, 2000:56 as cited by Dwyer & Kim, 2003:384). Various aspects motivate tourists to return to a country that could be perceived as the competitive factors or aspects of a country (du Plessis *et al.*, 2015:2). These key aspects, especially from an African perspective, include Political stability, Geographic proximity to high density and wealthy markets, Policies regarding Visa requirements, Impact of events, Routes to long-haul destinations and seat availability, Natural and manmade factors (Heath, 2003:336).

4.4.1.1.19 Star rating of accommodation in South Africa

Respondents were asked to rate the accommodation they used while visiting South Africa by indicating the star rating of the accommodation alongside the given options. These options include one-star to five-star accommodation ratings, as illustrated below in the graph-chart (Figure 4.6).

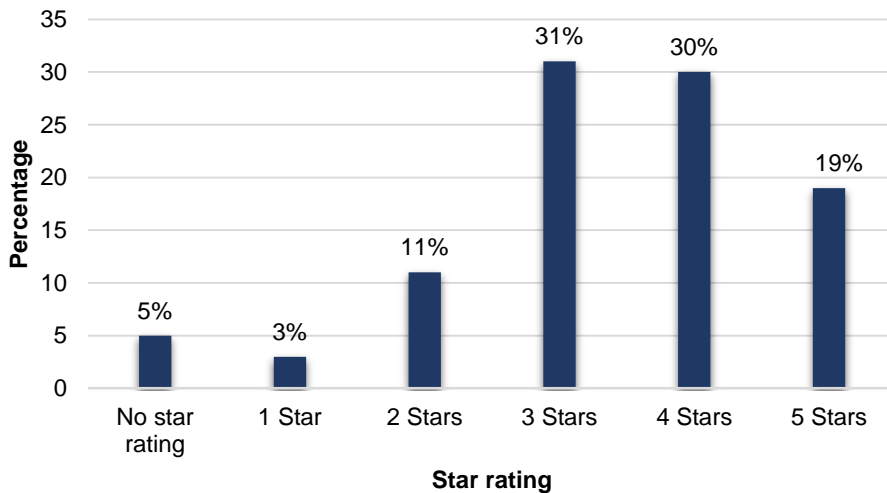


Figure 4.6: Star rating of the accommodation respondents stayed at

Thirty-one percent (31%) of the respondents stayed at **three-star** accommodations. This is followed by thirty percent (30%) who stayed at **four-star** accommodations and nineteen percent (19%) of the respondents stayed at **five-star** accommodations. Haarhoff (2007:193) stated that luxury accommodation (four- and five-star) was the most popular star-rated accommodation as well as three-star accommodation as the third mostly used accommodation type in the study conducted in 2007. This therefore concurs with the results of this study where the three-, four- and five-star rated accommodation formed part of the top three mostly used forms of all accommodations.

4.5.1.1.20 South Africa's safety as a tourist destination

In this question respondents were asked whether they consider South Africa as a safe tourism destination. As seen in Figure 4.7 eighty four percent (84%) of the respondents indicated South Africa **to be safe**

whereas sixteen percent (16%) did **not feel safe** while visiting South Africa. These results differ from those reported in the study conducted by du Plessis *et al.* (2017:11) seeing that the safety aspect was indicated as a weakness for the destination in their study, but in this study the majority of the respondents indicated that they felt safe while visiting South Africa.

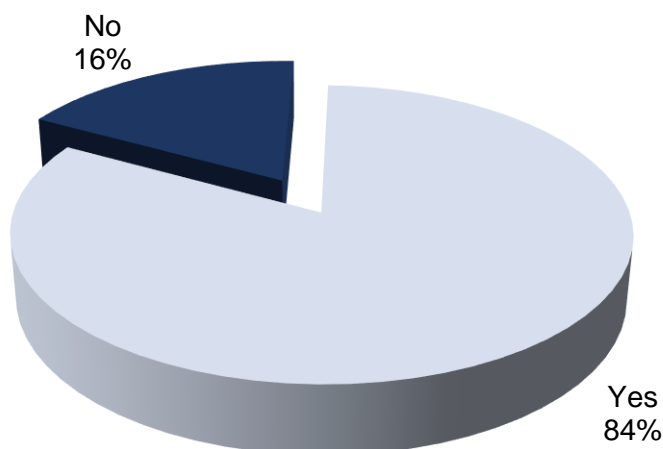


Figure 4.7: Safety of South Africa as a tourist destination

4.4.1.1.21 *Reasons why tourists do not consider South Africa safe*

Respondents were asked to indicate why they did not feel safe while visiting South Africa. This was an open-ended question where the respondents had to write the reasons for not considering South Africa safe. Although the minority of the respondents did not feel safe, the following were indicated as reasons (Table 4.16): five percent (5%) indicated it is because of the **crime**, 3% only felt safe at tourist areas. This is followed by two percent (2%) who said **Johannesburg is unsafe** and there is no security provided by police. One percent of the respondents indicated the following reasons for feeling unsafe: there were criminals on the street and they simply did not feel safe respectively. These results are not indicated in Table 4.16. The South African Tourism Report (2016:13) confirms that there has been certain incidents of crime in South Africa, but that tourists are not always the targets of crime.

Table 4.16: Reasons why respondents do not consider South Africa a safe destination

Reason	Percentage
Crime	5%
Johannesburg is unsafe	2%
No security by police	2%
Only tourist areas are safe	3%

The following section comprises of the aspects contributing towards destination competitiveness.

4.4.1.2. Aspects contributing to destination competitiveness

This section provides information regarding the respondents' perceptions of the competitiveness of South Africa. Respondents were asked to indicate their perceptions regarding aspects contributing to a destination's competitiveness, and the strengths and weaknesses of South Africa as a tourist destination.

4.4.1.2.1 Level of importance of aspects contributing to destination competitiveness

Respondents were instructed to rate the importance of competitiveness aspects to global competitiveness, which were provided by using a Likert scale and selecting between one and five on the scale. The Likert scale in Table 4.17 is: '1'= Not at all important and '5'= extremely important. To provide a better reflection of the results, the mean value (M) and standard deviation (SD) of each competitiveness aspect were calculated.

Based on the mean values illustrated in Table 4.17, it is clear that Availability of wildlife in the area (M=4.04; SD=±0.962) was seen as the most important competitiveness aspect. This is followed by safety and security (M=4.03; SD=±1.019), the hospitality of people (M=4.02; SD=±0.919), unique scenery (M=4; SD=±0.960) and value for money (M=3.99; SD=±0.878). Authors du Plessis et al. (2015:7), Heath (2002:343), Pansiri (2014:242) also identified the importance of the availability of wildlife in Africa to obtain destination competitiveness. This then correlates with the results of this study, which states that the respondents indicated the availability of wildlife as the most important aspect of competitiveness. Research studies by authors such as du Plessis *et al.* (2015), Dwyer and Kim (2003) and Enright and Newton (2004) emphasised the importance of safety and/or security as an important competitive advantage for destinations. Even though this aspect is not rated the most important aspect it is still essential in order to obtain a competitive advantage over other destinations.

Table 4.17: Level of importance of factors contributing to destination competitiveness

	1. Not at all important (%)	2. Slightly important (%)	3. Important (%)	4. Very important (%)	5. Extremely important (%)	Mean	Std Deviation
1. Moderate climate	3%	8%	33%	37%	21%	3.67	0.973
2. Unique scenery	4%	5%	34%	40%	34%	4.00	0.960
3. Variety and availability of fauna and flora	3%	2%	20%	38%	33%	3.93	1.012
4. Availability of wildlife in the area?	4%	3%	21%	37%	38%	4.04	0.962
5. Availability of World Heritage Sites	4%	5%	29%	39%	23%	3.71	1.007
6. Different languages spoken in SA (11)	8%	13%	27%	33%	20%	3.45	1.171
7. Exposure to diversity and history of cultures	2%	5%	26%	39%	28%	3.85	0.948
8. Hospitality of people, e.g. friendliness	1%	2%	24%	38%	35%	4.02	0.919
9. Mix of recreation activities, e.g. hiking	3%	4%	27%	41%	26%	3.83	0.957
10. Availability of adventure in tourism	3%	3%	25%	40%	29%	3.90	0.945
11. Special events hosted in the area	6%	11%	28%	36%	20%	3.52	1.110
12. Provision of entertainment choices	4%	9%	33%	33%	21%	3.58	1.057
13. Quality and availability of supra structures	5%	7%	30%	34%	23%	3.76	2.782
14. Availability of water and electricity	3%	3%	24%	35%	35%	3.97	0.978
15. Safety and security	2%	3%	22%	31%	41%	4.03	1.019
16. Availability of internet	3%	5%	26%	34%	34%	3.90	0.999
17. Availability of car rental services	6%	5%	28%	33%	28%	3.73	1.107
18. Effectiveness and cost of public transport	6%	7%	29%	32%	27%	3.67	1.119
19. Accessibility to South Africa and other tourism products	4%	4%	32%	32%	28%	3.75	1.034
20. Variety of accommodation establishments	1%	2%	29%	36%	32%	3.96	0.883
21. Quality of destination's service	1%	2%	27%	39%	31%	3.96	0.883
22. Value for money of SA (affordability)	1%	3%	27%	36%	33%	3.99	0.878
23. Long-haul destination	5%	10%	34%	30%	20%	3.51	1.083
24. Short-haul destination	7%	11%	35%	29%	19%	3.43	1.117
25. Awareness/image/brand	6%	8%	33%	32%	22%	3.57	1.147

	1. Not at all important (%)	2. Slightly important (%)	3. Important (%)	4. Very important (%)	5. Extremely important (%)	Mean	Std Deviation
26. Quality of foods and wine	2%	3%	24%	42%	29%	3.92	0.917
27. Variety of foods and wine	2%	4%	24%	41%	25%	3.94	0.907
28. Positive foreign exchange	2%	3%	29%	39%	26%	3.92	1.623
29. Quality of tourism products and services	2%	3%	29%	39%	26%	3.84	0.908
30. Variety of vacation packages	4%	7%	33%	37%	20%	3.62	1.009
31. Destination's ability to manage risks	3%	7%	30%	34%	26%	3.72	1.023
32. Political stability	7%	6%	26%	32%	29%	3.68	1.164

It is clear that the two aspects that were identified as the most important in Table 4.18 are also considered as essential in literature

4.4.1.2.2 Strengths and weaknesses of South Africa as a tourist destination

Respondents were asked to indicate the strengths and weaknesses of South Africa as a tourist destination by choosing the relevant option in the provided columns. As seen in Table 4.18, 96% of the respondents indicated the **variety and availability of fauna and flora** and **availability of wildlife in the area** to be strengths of South Africa. This is followed by ninety-five percent (95%) who reported **unique scenery** and **availability of World Heritage Sites** and **variety of accommodation establishments** as strengths. There were ninety-four percent (94%) of the respondents who indicated the availability of adventure in tourism and **quality of destination's services** as strengths.

However, sixty-two percent (62%) of the respondents indicated **Safety and security** as a weakness of South Africa. This is followed by **political stability** (56%) which is also indicated as a weakness of the destination. Another weakness of South Africa according to the respondents is the cost and availability of transport.

Table 4.18: Strengths and weaknesses of South Africa as a tourist destination

Aspect	Strength %	Weakness %
1. Moderate climate	92%	8%
2. Unique scenery	95%	5%
3. Variety and availability of fauna and flora	96%	4%
4. Availability of wildlife in the area?	96%	4%
5. Availability of World Heritage Sites	95%	5%
6. Different languages spoken in SA (11)	74%	26%
7. Exposure to diversity and history of cultures	93%	7%
8. Hospitality of people, e.g. friendliness	89%	11%
9. Mix of recreation activities, e.g. hiking	91%	9%
10. Availability of adventure in tourism	94%	6%
11. Special events hosted in the area	77%	23%
12. Provision of entertainment choices	75%	25%
13. Quality and availability of supra structures	67%	33%
14. Availability of water and electricity	65%	35%
15. Safety and security	38%	62%
16. Availability of internet	63%	37%
17. Availability of car rental services	84%	16%
18. Effectiveness and cost of public transport	52%	48%
19. Accessibility to South Africa and other tourism products	88%	12%
20. Variety of accommodation establishments	95%	5%
21. Quality of destination's service	94%	6%
22. Value for money of SA (affordability)	89%	11%
23. Long-haul destination	78%	22%

24. Short-haul destination	80%	20%
25. Awareness/image/brand	72%	28%
26. Quality of foods and wine	88%	12%
27. Variety of foods and wine	81%	19%
28. Positive foreign exchange	84%	16%
29. Quality of tourism products and services	89%	11%
30. Variety of vacation packages	13%	13%
31. Destination's ability to manage risks	53%	47%
32. Political stability	44%	56%

It is clear from the results in Table 4.18 the **variety and availability of fauna and flora** and **availability of wildlife in the area** are seen as major strengths of South, but that the **safety** of the destination is seen as a weakness. The following section includes a temporal analysis of the competitiveness aspects and the strengths and weaknesses of South Africa which was discussed in 4.4.1.2.

4.4.1.3 Temporal analysis

The temporal analysis was conducted on the studies of du Plessis (2002), van der Merwe (2015) as well as this study.

4.4.1.3.1 *Temporal analysis of the competitiveness factors/aspects of South Africa as a tourist destination*

As indicated before, two studies, namely those of du Plessis (2002) and van der Merwe (2015) were conducted 13 years apart and each investigated the aspects that contributed to the competitiveness of South Africa as a tourist destination from a supply side. This study also aims to identify the aspects and the factors (section 4.4.2) contributing to South Africa's competitiveness, but only from a demand side. Therefore a temporal analysis was conducted in order to compare the different studies over the years with one another as well as from different perspectives.

Table 4.19 indicates the top 5 most important tourism destination competitiveness aspects / factors as identified in the studies of du Plessis (2002), van der Merwe (2015) and the aspects identified in this study. It is clear from the literature review conducted in Chapter 3 (see Table 3.2) that the majority of the studies conducted on tourism destination competitiveness was conducted from a supply side. The two studies displayed in Table 4.19 under the 2002 and 2015 columns were also conducted from a supply side. The last column in Table 4.19 consists of the aspects identified in literature. Therefore, as already indicated in Chapter 3, a gap exists in research due to the lack of competitiveness research conducted from a supply side, which led the researcher of the current study to conduct the research from a demand side.

In 2002, du Plessis conducted research on the competitive advantages of South Africa as a tourism destination, which focussed on the work of authors Porter (1990) and Ritchie and Crouch (1993). The author identified 30 aspects that could contribute to a destination's competitiveness.

Table 4.19: Temporal analysis of competitiveness aspects over the years and literature

Supply	Supply	Demand	Literature as indicated in Chapter 3
2002	2015	2018	2000-2016
du Plessis	van der Merwe	Current	Literature
Safety (1st)	Safety and security (1st)	Safety and security (2nd)	Safety (5th)
Value for money (3rd)	Value for money (3rd)	Value for money (affordability) (5th)	Events (2 nd)
Attitude towards tourists (5th)	Locals attitude towards tourists (5th)	Hospitality of people, e.g. Friendliness (3rd)	Activities(1 st)
Quality of service (2 nd)	Quality of tourism services (2 nd)	Unique scenery (4 th)	Quality of service(4 th)
Geographical features (4 th)	Quality of experience on offer (4 th)	Availability of wildlife in the Area (1 st)	Infrastructure(3 rd)

Source: Author's own compilation

As depicted in Table 4.18 it is clear that the aspect **safety** or safety and security was the most important aspect in 2002 as well as in 2015. It is evident that safety and security whether researched from a demand or supply side or within literature, it still remains a crucial factor over time.

Three of the five competitiveness aspects, including the safety aspect, identified in 2002 as well as 2015 were also identified to be important in 2018 (demand side). These aspects include: **attitude towards tourists** or **hospitality of people** which is clearly important within the South African context, seeing that all three of the studies indicated this aspect as important (top three) for the country's competitiveness. Therefore, regardless of the time that has passed or the approach of the research, the highlighted aspects in Table 4.18 remain essential for the competitiveness of South Africa.

The demand side study (2018) focussed stronger on destination attributes such as wildlife and scenery, whereas the supply side studies (2002 & 2015) focussed primarily on the managerial aspects such as quality of service. In other words, the demand side (tourists) emphasised external aspects as being essential and the supply side (tourism role players such as tour operators) regarded internal aspects to be important competitiveness aspects

Except for the aspects safety and quality of services, no other similarities between the competitiveness aspects identified frequently in literature and the aspects identified in the studies focussing on South Africa as a tourist destination in Table 4.19. Therefore, it can be concluded that over time the most important competitiveness aspects remained the same. .

Together with identifying the competitiveness aspects, it is also essential to identify the strengths and weaknesses of South Africa. Pearce (1997:24) points out that as soon as a destination becomes more competitive, the strengths and weaknesses of the destination become more important. Hence, it is essential to be knowledgeable about the strengths and weaknesses of other destinations as well as about those of one's own destination.

4.4.1.3.2 *Temporal analysis of the strengths and weaknesses of South Africa as tourist destination*

Table 4.20 contains the strengths from the three studies, as indicated above. These strengths are compared to establish whether the respondents indicated the same strengths across the years as well as the approaches. After this discussion will follow the comparison between the weaknesses of these three studies.

Table 4.20: Temporal analysis of the strengths of South Africa between the years 2002, 2015 and 2018

Supply	Supply	Demand
2002	2015	2018
du Plessis	van der Merwe	Current
Scenery	Scenery	Unique scenery
Geographical features	Geographical features	Availability of wildlife in the area
Climate	Climate	Moderate climate
Availability of quality accommodation	Variety of accommodation	Variety of accommodation establishments
Museums and cultural attractions	Availability of different tourism products	Exposure to diversity and history of cultures
Food	Quality and variety of foods	Availability of adventure in tourism
Historical and cultural features	African experience	Variety and availability of fauna and flora
Value for money	Quality of experience on offer	Quality of destination's service
Uniqueness of local people	Sports and recreation	Mix of recreation activities
Foreign exchange	Variety of vacation packages	Availability of World Heritage Site

Source: Author's own compilation (Adapted from van der Merwe, 2015:79)

Table 4.20 includes the strengths as indicated by different respondents from different studies. Four aspects that remained strengths regardless of the time that has passed or the approach used (demand or supply) include **geographical features, climate, availability of quality accommodation and scenery**. The geographical aspect could be compared to the availability of wildlife seeing that "geography" refers to physical features, which includes fauna and flora (Oxford dictionary, 2010:624). Another strength of South Africa is the availability of accommodation. Hong (2008:73) declares that if a destination provides a variety of accommodation establishments at a destination, it will provide tourists with higher satisfaction levels and positive experiences. Therefore, it is important for South Africa to keep this aspect as a strength in order to keep attracting tourists. The other aspects, climate and scenery, which are external aspects, are important strengths for South Africa. Heath (2002:339) states that climate is a good "foundation" for a good competitive advantage over other destinations. Therefore it is positive that this aspect remains a strength of South Africa. The strengths geographical features, climate and scenery are referred to as comparative advantages of South Africa (Heath, 2002:335), but the availability of accommodation is a competitive advantage.

The aspect **historical and cultural features** identified in 2002 were also considered a strength in 2018, and were referred to as the **diversity and history of cultures**. It is interesting that from both a supply and demand side, this aspect remained a strength of the destination. Even though in the 2015 study the aspect history and culture did not feature in the top ten strengths, the aspect African experience was identified as a strength. The history and culture aspect could include the African dances, tasting cultural food (cuisine), artwork or having contact with different cultures (Prentice, 1993 as cited by Heath 2002:338). These elements all could be linked to the unique African experience. In other words, the tourists could feel the African experience while being in contact with the history and culture of South Africa.

The aspect “**food**” is a strength in both the supply side studies conducted in 2002 and 2015, but not in 2018. The quality and variety of food offered by a destination could influence its appeal (Ritchie & Crouch, 2010:1057). Clearly, the tour operators have a different opinion of the quality and variety of food of South Africa than do the tourists.

In 2002 geographical features was identified a strength, in 2015 the aspect “African experience” and in 2018 the aspect availability of wildlife. The geographical features of a destination are important for the African experience seeing that these features consist of ecosystems and landforms. The geographical features are also essential for the availability of wildlife, which contributes towards the African experience. The availability of wildlife is connected to the unique African experience, seeing that Africa’s wildlife is not available everywhere. Therefore one can conclude that the geographical features (including the African experience and the availability of wildlife) are seen as strengths of South Africa over the three different periods.

Another strength of South Africa is the quality of products and services. This strength was indicated in the 2015 study as quality of experience on offer and in 2018 as quality of destination’s services. A destination is also considered competitive if it can provide a good service that tourists are willing to pay for (Dwyer & Kim, 2003:372). It is positive for South Africa’s competitiveness that the respondents indicate the quality of destination’s services as a strength. The quality of the experience on offer is linked to the service provided by the suppliers. This aspect was not indicated a strength in the 2002 study by du Plessis, which indicates that this aspect could have improved over the years.

The strengths variety of vacation packages, availability of world heritage sites, mix of recreation activities and availability of adventure tourism could be seen as similar aspects. The aspects availability of world heritage sites, mix of recreation activities and availability of adventure tourism, identified in 2018, can fall under the variety of vacation packages. Vacation packages could include adventure activities, visitation to World Heritage sites as well as other recreational activities. From the strengths, certain weaknesses were identified in Table 4.21.

Table 4.21: Temporal analysis of the weaknesses of South Africa between the years 2002, 2015 and 2018

Supply	Supply	Demand
2002	2015	2018
du Plessis	van der Merwe	Current
Safety (88%)	Safety and security (82%)	Safety and security (62%)

Public transportation (86%)	Accessibility of transport services (62%)	Effectiveness and cost of public transport (48%)
Location (70%)	Long haul destination (50%)	Political stability (56%)
Marketing (61%)	Image and awareness (50%)	Destination's ability to manage risks (47%)

Source: Author's own compilation (Adapted from van der Merwe, 2015:80)

It is clear that in all three these studies listed in Table 4.21, the safety aspect is seen to be a weakness of South Africa over time. The South African Tourism Report (2016:13) agrees with this weakness by stating that in the past as well as in the present there has been “high profile” incidents as well as worsened perceptions of how safe South Africa is. Therefore, this proves that in 16 years the perception of the safety of South Africa remained the same. However, even though safety was indicated as a weakness, respondents indicated that they felt safe after their visit to South Africa based on the results in the empirical survey (c.f. 4.5.1.1.20).

Another weakness of South Africa in 2002 and 2015 and 2018 was the effectiveness and the cost of public transport. The South Africa Tourism Report (2016:16) states that South Africa still has under-developed public transport in various parts of the destination. This could be a possible reason why the respondents see this aspect as a weakness of South Africa.

It is interesting to observe that the weaknesses identified by the demand side study are mostly external aspects which are out of the tourism business owner’s control. These aspects include **safety and security, political instability, effectiveness and cost of public transport and destination’s ability to manage risks**. The government could have an impact on these aspects. The next section consists reports on the exploratory results of a factor analysis conducted on the aspects displayed in Table 4.22.

4.4.2 Exploratory results

The exploratory results section included conducting a factor analysis for the tourism competitiveness aspects of South Africa as a tourist destination. Respondents were asked to rate the importance of competitiveness factors of South Africa as a tourist destination that was provided in the form of a Likert scale by selecting from one choice from 1 (Not at all important) to 5 (Extremely important) on the scale.

4.4.2.1 Factor analysis of the tourism competitiveness of South Africa as tourism destination

To verify that the data obtained is suitable for an exploratory factor analysis it is essential to check that the Kaiser-Meyer-Olkin (KMO) measure is above 0.6 in value and that the Bartlett’s Test of Sphericity value is a Sig. (Significant) value of 0.5 or smaller. These were used to determine whether the covariance matrix was suitable for each of the deciding factors.

For an aspect to be suitable for a factor analysis the factor loadings must be 0.3 or higher in the pattern matrix (Pallant, 2016:187). If the factor loadings were less than 0.3 they were not considered as correlating with the specific factor and were ignored (Kline, 2014:6). If any aspect cross-loaded on two factors, and

these loadings were both above 0.3, the aspect will be categorised within the factor that best describes it (where it fits best). This resulted in five (5) tourism destination competitiveness factors. The total percentage variance explained resulted in 67,60%. The total variance explained table is used to determine how many aspects have an eigenvalue of 1 or more (Pallant, 2016:193). A reliability coefficient (Cronbach's Alpha) was calculated for each factor in order to estimate its internal consistency. All factors with a Cronbach Alpha of higher than 0.743 were considered reliable, since a recommended CA for any study is ≥ 0.7 . The Bartlett's Test of Sphericity had a significant value of $p \leq 0.000$.

It is clear that the Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy for this study can be seen as highly reliable since these KMO is higher than 0.9, which is categorised as "superb". The Cronbach Alphas were well above the expected 0.7 (lowest 0.743 and highest 0.916) which indicates a high reliability of these factors.

Table 4.22: Summative results of the exploratory factor analysis

Factors	Aspects measured in each factor Tourism competitiveness of South Africa	Factorability information	Statistical value
Factor 1: Tourism services (8 aspects)	Availability of car rental services (0.303) Effectiveness and cost of public transport (0.320) Quality of foods and wine (0.468) Variety of foods and wine (0.493) Accessibility to South Africa and other transport products (0.562) Value for money of SA (affordability) (0.703) Quality of destination's service (0.766) Variety of accommodation establishments (0.867)	KMO of the sample	0.927
		Percentage of variance explained	42.41
		Cronbach's α (CA)	0.908
		Range of factor loadings	0.303-0.867
		Mean value	3.882
		Inter-item correlation	0.564
		Rank amongst factors	2 nd
Factor 2: Risk and quality (5 aspects)	Positive foreign exchange (-0.547) Variety of vacation packages (-0.574) Quality of tourism products and services (-0.664) Political stability (-0.763) Destination's ability to manage risks (-0.865)	KMO of the sample	0.927
		Percentage of variance explained	49.02
		Cronbach's α (CA)	0.867
		Range of factor loadings	-0.547- 0.865
		Mean value	3.760
		Inter-item correlation	0.576
		Rank amongst factors	4 th
Factor 3: Unique tourism attributes (9 aspects)	Moderate Climate (0.476) Availability of adventure tourism (0.487) Hospitality of people, e.g. friendliness (0.513) Exposure to diversity and history of cultures (0.541) Mix of creation activities, e.g. hiking (0.606) Availability of world heritage sites (0.616) Variety and availability of fauna and flora (0.817) Unique scenery (0.858) Availability of wildlife in the area? (0.885)	KMO of the sample	0.927
		Percentage of variance explained	55.14
		Cronbach's α (CA)	0.916
		Range of factor loadings	0.476-0.858
		Mean value	3.886
		Inter-item correlation	0.549
		Rank amongst factors	1 st

Factors	Aspects measured in each factor Tourism competitiveness of South Africa	Factorability information	Statistical value
Factor 4: Locality (4 aspects)	Short-haul destination (-0.460) Long-haul destination (-0.470) Safety and security (+0.414) Availability of water and electricity (+0.425)	KMO of the sample	0.927
		Percentage of variance explained	59.01
		Cronbach's α (CA)	0.743
		Range of factor loadings	-0.460-0.425
		Mean value	3.793
		Inter-item correlation	0.418
		Rank amongst factors	3 rd
Factor 5: Entertainment and amenities (6 aspects)	Awareness/image/brand (0.322) Availability of internet (0.449) Different languages spoken in SA (11) (0.574) Quality and availability of superstructures (0.763) Special events hosted in the area (0.798) Provision of entertainment choices (0.866)	KMO of the sample	0.927
		Percentage of variance explained	61.81
		Cronbach's α (CA)	0.893
		Range of factor loadings	0.322-0.866
		Mean value	3.622
		Inter-item correlation	0.582
		Rank amongst factors	5 th

Factor 1: Tourism services

According to the obtained results the first factor, Tourism services, is the second most important factor out of the five factors. This factor had a mean value of 3.88 and a Cronbach's α of 0.908. This factor's aspects included: **variety of accommodation establishments, value for money, quality of destination's services, value for money of SA (affordability), accessibility to South Africa and other transport products, variety of food and wine, quality of food and wine, effectiveness and cost of public transport and availability of car rental services.** Ritchie and Crouch (2003:63) also identified the importance of value for money of a visit to the destination. The aspect **quality of destination's services** is supported by research conducted by Ritchie and Crouch (2003:183), Dwyer and Kim (2003:383) and Gomezjl and Mihalic (2008:298) who indicated this aspect as an important factor of tourism competitiveness. Go and Govers (1999:80) highlight one of the important aspects to be considered while measuring a destination's competitive position against that of other destinations is the quality of services and this is specifically applied within the convention sector of tourism. Dwyer and Kim (2003:383) continues by stating that the provision of quality tourism services "enhances a destination's competitive advantage." Lee and King (2009:251) also identified the aspect accommodation as a factor contributing to the competitiveness of a destination. These studies emphasise the importance of the contributing factors of tourism competitiveness, because other studies also obtained similar results with regard to the aspects mentioned in factor 1. It is important to note that the attributes within this factor can differ depending on the destination (du Plessis *et al.*, 2015:9) and in the case of this study, it is specifically applicable to South Africa from a demand side. In other words, from the tourist's perspective.

Factor 2: Risk and quality

The risk and quality factor, with a mean value of 3.76 and a Cronbach's α of 0.867 is ranked fourth most important competitive factor. The aspects within this factor included: **destination's ability to manage risks, political stability, the quality of tourism products and services, variety of vacation packages and positive foreign exchange**. Enright and Newton (2005:346) and Phakdisoth and Kim (2007:228) found the aspect **political stability** to be an important contribution to the tourism competitiveness of a destination. The study conducted by Enright and Newton (2005:346) showed that the aspect **strong currency** which could be compared or considered *foreign exchange* was indicated as very important for a destination's competitiveness. Saayman and Saayman (2008:93) state that exchange rates are considered one of the factors that influence tourism demand. Dwyer *et al.* (2000:9) proclaim that competitiveness is "a general concept that encompasses price differentials coupled with exchange rate movements, productivity levels of various components of the tourist industry and qualitative factors affecting the attractiveness or otherwise of a destination". It is evident that these authors also recognised the importance of a positive exchange rate for a competitive tourism destination. Other studies such as those of Dwyer and Kim (2003:373) and Gomezjl and Mihalic (2008:298) recognised the factor quality service contributing to tourism competitiveness, but do not directly refer to the quality of the tourism products. In the study conducted by Crouch and Ritchie (2003) they refer to the **risk-taking ability** of a destination as a way that a destination can enhance its competitiveness.

Factor 3: Unique tourism attributes

The unique tourism attributes factor had a mean value of 3.88 and a Cronbach's α of 0.916 which ranks it the most important factor. These aspects included: **availability of wildlife in the area, unique scenery, variety and availability of fauna and flora, availability of world heritage sites, mix of recreation activities, exposure to diversity and history of cultures, hospitality of people, availability of adventure tourism and moderate climate**. None of the prominent tourism competitiveness research from authors such as Dwyer and Kim (2003), Heath (2003) or Ritchie and Crouch (2003) mentioned the **availability of wildlife** as a contributing factor to the destination's competitiveness. This could be because South Africa as a destination specifically, is well-known for its availability of wildlife and that these results are relevant to the destination specifically. However, Naudé and Saayman (2005:387) clearly state that tourists visiting Africa are not only interested in the climate, but also in experiencing the wildlife in South Africa. The African Dream Website (Open Africa, 2000 as cited by Heath, 2002:343) points out that South Africa's wildlife element could possibly contribute to the destination's tourism becoming one of the most valuable products. According to the SWOT analysis conducted by South Africa Tourism Report (2016:15), viewing of wildlife is referred to as a strength of South Africa as well as "important to South Africa". This concurs with the results obtained from this current study, which confirms that the availability of wildlife is a contributing factor to the destination's competitiveness. Even though no other research indicates the availability of wildlife as a factor, it could be that this aspect is relevant to South Africa's competitiveness specifically. The **hospitality aspect** is also mentioned by other authors such as Ritchie and Crouch (2003:139) and Dwyer and Kim (2003:377). Dwyer and Kim (2003:386) state that hospitality refers to the

“perceived friendliness of the local population and community attitudes towards tourists.” The **scenery aspect** was identified by du Plessis (2002:83) in her study on the factors that play a role in global competitiveness. This aspect was rated in the top 5 most important factors that contribute to global competitiveness. Tourism attributes is indicated by various researchers to be the most important aspect contributing to the competitiveness of tourist destinations (Ritchie & Crouch, 2003:139; Dwyer & Kim, 2003:380; du Plessis *et al.*, 2015:9).

Factor 4: Locality

The locality factor, with a mean value of 3.79 and a Cronbach's α of 0.743, ranked the third highest factor out of the five factors. These aspects included: **long-haul destination, short-haul destination, availability of water and electricity and safety and security**. The aspect **safety and security** was also considered important in du Plessis' (2002) study on global competitiveness from a supply side. It is clear that all of the aspects in this factor are external, which means there is no direct control over them by the tourism business owners. These results concur with those of the current study, namely that the aspect safety and security is essential as a contributing factor to competitiveness from both a demand and supply side. Heath (2002:340) states that aspects such as safety and security within a destination are referred to as important with regard to determining the destination's competitiveness. Dwyer and Kim (2003:397) stress that safety and security are “key elements of destination competitiveness.” This also concurs with research conducted by authors such as Ritchie and Crouch (2003:237), Enright and Newton (2004:778) as well as Lee and King (2009:251) who identified safety and security as contributing factors to a destination's competitiveness. It is evident that, according to Maslow's needs hierarchy, the safety need of people engage the second level of the hierarchy and refers to the need of being safe from threats or harm (Kaur, 2013:1062). Therefore, these results obtained are supported by literature, stating the importance of safety and security of people, especially in areas they are not familiar with. The **availability of water** aspect is also mentioned in Maslow's needs hierarchy as a basic need (Kaur, 2013:1062). Heath (2002:341) accentuates the fact that key attractors such as water supply establish primary motivations for tourists to visit a destination, because it provides a foundation for a successful tourism industry. Theory suggests that the tourism demand for a given destination will vary with regard to the distance that needs to be travelled to the destination (Zillinger, 2005 as cited by Fang Bao & McKercher, 2008:102). In other words, the greater the distance the less likely tourists are to visit the destination (Fang Bao & McKercher, 2008:102).

Factor 5: Entertainment and Amenities

The entertainment and amenities factor had a mean value of 3.622 and a Cronbach's α of 0.893.. This factor comprises of: **provision of entertainment choices, special events hosted in the area, quality and availability of supra structures, different languages spoken in South Africa, availability of internet and awareness/image/brand**. Authors Ritchie and Crouch (2003:63) as well as du Plessis *et al.* (2015:9) agree with the identification of supra structures as being one of the aspects to consider when considering the competitiveness of a destination. The aspect provision of entertainment choices is supported by various authors in literature such as Dwyer and Kim (2003:380), Heath (2002:338) and

Ritchie and Crouch (2003:124). Heath (2002:338) claims that the provision of entertainment and image of the destination could influence the competitiveness of a destination.

4.5 Conclusion

The aim of Chapter 4 was to investigate the competitiveness of South Africa as a tourist destination from a demand point of view by applying a quantitative research method. This was done by providing insight into the demographic profile of the visitors, competitiveness aspects of South Africa, a temporal analysis over time as well as a factor analysis. The results were divided into two parts, namely descriptive and exploratory results.

The overall profile of the respondents of this study is that the majority were male respondents with an average age of 39 years, mostly from the African or South American continent and visiting South Africa for the first time. These travellers are adventure tourists who travel individually and spend an average of R17,214.44 during their visit to South Africa.

The results revealed that the top three aspects contributing to South Africa's tourism destination competitiveness and which scored the highest mean values are availability of wildlife in the area, safety and security and hospitality of the people of South Africa. The aspects **safety and security**, as well as **hospitality of the people** correlate with literature (see Table 4.18). However, other aspects such as **variety and availability of fauna and flora** as well as the **availability of wildlife in the area** were under the top ten of most important competitiveness aspects of South Africa, but did not feature in literature. One could conclude that these are two destination-specific factors, uniquely applicable to South Africa.

Once these aspects were compared with one another, the strengths and weaknesses of South Africa were identified. The top two aspects that were considered strengths of South Africa from a demand side are: variety and availability of fauna and flora, availability of wildlife in the area. The top two aspects that were considered weaknesses of South Africa from a demand side are: **safety and security** and **political stability**.

A temporal analysis was conducted to compare the different competitiveness aspects of South Africa with one another within different timeframes. The competitiveness aspects of South Africa of the three studies were compared. The results there were four factors identified in all three the studies: **safety and security, value for money, hospitality of the people and geographical aspects**. The temporal analysis conducted on the strengths and weaknesses revealed that three of the studies regardless of whether it was conducted from a demand or supply side or in which year, found **geographical features, availability or variety of accommodation establishments, climate** as well as **scenery** to be strengths of South Africa. On the other hand, the weaknesses in all three these studies were found to be **safety** and **public transportation**.

Section 4.2 included the exploratory results which arose from a factor analysis. The factor analysis resulted in five factors namely **tourism services, risk and quality, unique tourism attributes, locality and**

entertainment and amenities. Chapter 5 provides the findings of the research, draw conclusions and make recommendations regarding the results discussed in this chapter.

CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS

5.1 Introduction

The main aim of this study was to analyse tourism competitiveness and conduct a demand analysis of South Africa as a tourist destination. To achieve this aim, the following objectives were set in Chapter 1 and accomplished in their respective chapters:

The first objective was to analyse competitiveness by means of a literature overview and conceptualise the definitions, models and aspects/factors of competitiveness and lastly to compare competitiveness and comparative advantage as research field. This was performed in Chapter 2 of the study. The overview revealed that consensus has still not been reached among researchers as to what tourism competitiveness truly means. Researchers are divided as to what factors or aspects contribute to competitiveness or which model is the most relevant to a specific destination. There were differences as to what the researchers see as factors or aspects contributing to competitiveness or which model is the most relevant to a specific destination. The significant findings of this chapter are that no single definition or model is currently utilised within literature to establish tourism competitiveness.

The second objective was to conduct a comprehensive literature review and analysis based on previous research studies done on the competitiveness of destinations within the tourism industry and was achieved in Chapter 3. This chapter was a review of any accessible article, which focussed on tourism or destination competitiveness and those that were obtainable to include in this study. The articles were then sorted in a table according to the year in which the article was published, the continent the case study articles were based on, the research focus of the article and the approaches followed. This review showed that most of the articles published on tourism or destination competitiveness focussed on Europe and that only eleven out of one hundred and twenty-one (121) articles in the sample focussed on South Africa specifically. One of the findings is that a gap exists in literature on tourism competitiveness research regarding the approach being used to investigate the tourism aspects of competitiveness. This is due to the majority of the articles having researched tourism competitiveness aspects/factors from a supply side and not a demand side.

The third objective was to investigate the competitiveness of South Africa as a tourist destination from a demand point of view using empirical research and was achieved in Chapter 4. Chapter 4 focussed on capturing the descriptive and exploratory results. Descriptive results were used to profile the respondents and to conduct a temporal analysis of the competitiveness aspects; the strengths and weaknesses of South Africa. The exploratory factor analysis was conducted to identify the factors contributing to tourism competitiveness. The results showed that five (5) factors were identified contributing to tourism competitiveness from a demand side namely tourism services, risk and quality, unique tourism attributes, locality and entertainment and amenities.

The final objective was to draw conclusions acquired from previous chapters and establish recommendations, which will assist in the improvement of South Africa as a competitive tourism destination. This chapter (Chapter 5) conclude the findings of the research and use the results to make recommendations concerning the current tourism competitiveness of South Africa from a demand side.

These recommendations can also assist DMOs of South Africa about the aspects they should focus on when marketing the destination to foreign tourists.

This chapter aims to draw conclusions and make recommendations with regard to South Africa's tourism competitiveness as well as to identify aspects for future research. Chapter 5 adheres to the theoretical framework that was stated in Chapter 1 (Figure 1.3).

5.2 Conclusions

The conclusions were discussed with regard to the two literature reviews and the survey, as reported in Chapters 2, 3 and 4 respectively.

5.2.1 Conclusions regarding the literature reviews (Chapters 2 and 3)

The first part of the discussion focused on the conclusions obtained from Chapter 2 followed by Chapter 3's conclusions. These chapters were discussed under the appropriate headings as seen below.

5.2.1.1 Chapter two: Understanding tourism destination competitiveness

Chapter two focussed on exploring previous literature conducted on tourism competitiveness, but it specifically focussed on the definitions, aspects, differences between competitive and comparative advantage and models of tourism competitiveness.

- The term competitiveness originates from the word *competitor*, which implies competition (c.f.2.3.1). Competitiveness can be investigated on different levels including the firm level, which was first researched by Porter in 1980 (c.f.2.3.1).
- A definition provided of competitiveness was: "Competitiveness at industry level arises from superior productivity, either in terms of lower costs than rivals or the ability to offer products with superior values that justifies premium price." Competitiveness is linked to the productivity of the firm (c.f.2.3.1).
- Competitiveness still lacks a universal definition, but other authors state that definitions are not true nor false. (c.f.2.3.1). This means that even though various definitions of competitiveness exist, none of these definitions can be referred to as incorrect or correct, but they can be more applicable to certain contexts or industries than others. Competitiveness could mean different things to different people (c.f.2.3.1).
- Porter stated that competition intensifies when the competition arrives (c.f.2.3.1). In other words, when there are competitive companies who do provide similar products, the competition increases in terms of offering better services or prices. It is precisely for this reason that Porter's description of competitiveness can also be applied within the tourism industry (c.f.2.3.1).

- The tourism industry is different from the firm level as researched by primarily Porter, because the experience is sold to the tourists instead of a physical product, which is the case for the firm-level (c.f.2.3.1).
- Tourism competitiveness consists of two concepts, which are **tourism** and **competitiveness**. (3.2.3.1).
- Tourism competitiveness was initially researched by Poon (1993) and after that, other researchers commenced with investigating this concept and developing definitions, models and aspects or factors of competitiveness.
- Tourism competitiveness can be applied to a destination, which is then called destination competitiveness (c.f.2.3.1). Different authors have a diversity of ideas as to what makes a destination competitive.
- The literature study showed that many definitions of tourism or destination competitiveness exist, for the sake of this study, one definition was used, which is: What makes a tourism destination truly competitive is its ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations.” (c.f.2.3.1).
- Other authors compared the concepts “competitive advantage” and “comparative advantage”. Some authors state that there is a difference between the two ideas and other authors indicate no difference between these concepts and that they can be used interchangeably (c.f.2.3.2). Comparative advantages are those advantages that refer to inherited resources of a destination. These inherited resources include the climate or scenery of the destination, while competitive advantages include created resources such as infrastructure and events of a destination (c.f.2.3.2). Different theories exist concerning reasons for some destinations to have a competitive advantage and others a comparative advantage, but it is essential for a destination to have a competitive as well as a comparative advantage.
- The following trade theories were identified, which explain how one destination can obtain a comparative advantage over others:
 - Linder (preferences)
 - Ricardian theory (technology/productive efficiency)
 - H-O theory (Heckscher-Ohlin Theory)
 - Multinational firms (Ownership advantages)
 - Neo-technology (Innovation/diffusion patterns)
 - Agglomeration (Externalities, infrastructure, chance)

- Tourism destination competitiveness is referred to as an essential concept for destinations to obtain a favourable position in the world tourism market.
- A variety of factors/aspects exist that contributed to the creation of models (c.f.2.3.3). Destinations need to be aware of the type of product they are offering because tourism products are intangible. These competitiveness models provide clarity as to how a destination can improve its competitiveness.
- Models are developed to investigate certain vital elements of tourism or destination competitiveness as well as to identify the strengths and weaknesses of a destination (c.f.2.3.3).
- No universal tourism/destination competitiveness model exists (Dwyer & Kim, 2003; Balkyte. & Tvaronavičienė, 2010), but the most prominently used model is that of Ritchie and Crouch (2003:63) (c.f.2.3.3).
- This study investigated seven models of competitiveness. The tourism or destination competitiveness models discussed in Chapter two were primarily based on the work of Porter, even though Porter focussed on the firm-level competitiveness (c.f.2.3.3).
- The models discussed in Chapter two included:
 - Porter's five-forces model
 - The Porter diamond, or the determinants of a competitive advantage
 - The WES approach
 - Poon's destination competitiveness model
 - Ritchie and Crouch's conceptual model of destination
 - The Dwyer-Kim model of destination competitiveness
 - Heath's model for enhancing Africa's sustainable tourism competitiveness
- These models each have unique elements, which, according to the respective models, determine competitiveness (c.f.2.3.3.). Table 2.4 provides a summary of the different models and the items they consist of.
- Together with these models, factors/aspects/determinants of competitiveness were also investigated which has been going on for quite some time (c.f.2.3.4).
- Within literature, internal and external factors/aspects are mentioned, with external factors/aspects being inflation, amongst others, over which a destination has no control and internal aspects over which the destination does have control, such as infrastructure (c.f.2.3.4).

5.2.1.2 Chapter three: A Review of tourism and destination competitiveness

Chapter 3, provided a review of all the articles conducted on tourism and destination competitiveness. It was difficult for the researcher of this study to obtain an overall view of literature on tourism and destination competitiveness (c.f.3.1). Therefore, this review may resolve this matter by providing an overview of all the

obtainable articles on tourism and destination competitiveness. Literature on tourism and destination competitiveness was obtained from journals that were accessible (c.f.3.2). One hundred and twenty-one (121) articles on tourism or/and destination competitiveness were used. The conclusions drawn from Chapter 3 include:

Journals focussing on tourism and destination competitiveness:

- Various articles were published in the top ten tourism journals (high impact journals) and these journals were **Tourism management** (13 articles), **Journal of travel research** (11 articles), **Annals of tourism research** published (7 articles), **Tourism economics** journal (7 articles), **Current issues** five (5 articles), **Tourism analysis** (4 articles) (c.f.3.3.1.1). Therefore, tourism or destination competitiveness is seen to be essential, seeing that it is published in high-impact journals, which are highly influential in their field and, published frequently.

Timeframe of the published articles that focus on tourism competitiveness:

- The first articles in the sample were published in 1997. Since 1997 articles were published annually, but in the year **2009** the most articles were published (14 articles) (c.f.3.3.1.2). More articles have been published annually since 2009 than in the previous years (c.f.3.3.1.2). The first case study article based on Africa, was published in 2002. Thereafter, based on South Africa, two articles were published in 2003. Thereafter, more articles focussed on South Africa. The amount of articles that are currently published on tourism and destination competitiveness is still not efficient due to the importance of competitiveness for a destination.

Journal articles on tourism competitiveness according to the continent of the case study:

- This includes the continents as case studies the research was focussed on (c.f.3.3.2.1). Figure 3.2 contained different headings under which the articles were categorised. One of these options included the “not-specified.” Forty-four (44) out of the one-hundred twenty one (121) articles were not based on a specific continent or country, but were merely a review or general research study which did not focus on a particular country or continent. Besides the not-specified list, most of the articles were case studies of **Europe** (27 articles) (c.f.3.3.2.1). There are certain continents that still lack research on tourism or destination competitiveness. This constitutes a gap that can be addressed by future research.

Journal articles conducted on tourism competitiveness from a demand or supply approach:

- Tourism demand refers to measuring the tourist’s utilisation of goods and services provided by a destination (c.f.3.3.2.2). Tourism demand answers the question: what do tourists want and need in order to visit the destination. It is important for the tourism demand of tourists to be met by the tourism supply of the goods and services (c.f.3.3.2.2). The supply side focusses on what the destination has to offer such as attractions, services and accommodation. The research articles in the sample could be conducted either from a demand approach or supply approach or from a mixed approach, which includes both the aforementioned approaches. The majority (82) of the articles followed a **supply-side** approach (c.f.3.3.2.2). Only 14 of the articles in the sample followed a demand-side approach and 45 a mixed approach. It is evident that only a small percentage of the

studies followed a demand-side approach, which could be ascribed to the fact that researchers mostly want to ask tourism experts their opinions rather than the opinions of the tourists.

Journal articles distributed regarding research focus:

- Different research focusses can be applied, including: destination competitiveness, tourism competitiveness, price competitiveness as well as tourism destination competitiveness (c.f.3.3.2.3). Most (58%) of the articles in the sample focussed on **destination competitiveness**. Some of the articles with this focus are those of Dwyer and Kim (2003), Enright and Newton (2005) as well as Ritchie and Crouch (2000). It was interesting to see that some of the articles focussed on price competitiveness, which means that an economic focus was evident in some of the studies. More research should be conducted on tourism competitiveness or on the difference between tourism and destination competitiveness.

Research topics of the Journal articles:

- The articles in the sample focussed on various topics. For purposes of this study these topics were categorised in Table 3.1. These categories include: factors/indicators/aspects, models, definitions and other. Forty-eight (48) articles focussed on **factors/indicators** or **models** (c.f.3.3.2.4). The opinions with regard to what the tourism competitiveness factors/aspects or models are differ from author to author. Some of the research topics of the articles focussed on more than one of the categories set out in Figure 3.5. Lack of research that just focusses on the definition of competitiveness or provides a universal definition thereof.

Top ten identified competitiveness aspects/factors:

- The competitiveness aspects/factors indicated in Table 3.3 were then analysed. Before commencing with the analysis, the ten factors or aspects mentioned most in these articles were used (c.f.3.3.3.1). Table 5.1 contains the top ten most identified aspects in the study. The aspects/factors that were analysed are applicable to various continents. Some of the aspects/factors of the research articles are applicable to the African continent or South Africa specifically. The aspect/factor that was identified most often was **activities**, which was identified twenty-five (25) times. The activities aspect/factor includes water-based activities, nature-based activities as well as recreational activities. These top ten aspects/factors were then analysed according to approach. The aspect/factor **activities** were mentioned twenty-five (25) times in the articles (which makes it the aspect/factor that was identified the most in the sample articles) (c.f.3.3.3.1).

A Review of tourism competitiveness factors from different approaches:

- The different approaches that could be followed to conduct research on the aspects/factors included demand, supply and mixed approach (c.f.3.3.3.2). Based on the literature reviews in Chapter 3, the top ten competitiveness aspects from a demand, supply and mixed approach side are displayed in Table 5.1.

Table 5.1: Summary of aspects in Chapter 3

Top ten competitiveness aspects
1 Climate
2 Information
3 Shopping
4 Environment image
5 Development
6 Infrastructure
7 Safety
8 Quality of service
9 Events
10 Activities

Supply: **Infrastructure** (identified 19 times) which makes it the most frequently mentioned aspect/factor. The infrastructure aspect/factor was only identified three times from a demand side and not once from the mixed approach.

Demand: The **activities**, as well as quality of **service** aspect/factor (identified five times). This aspect/factor was overall identified seventeen (17) times in the sample articles.

Mixed: The **safety** aspect/factor was identified the most times (five times). Safety was overall identified twenty-three times (23).

Tourism or destination competitiveness can be analysed on the grounds of different approaches and be applied to different destinations (c.f.3.3.3). There are several tourism competitiveness aspects or factors which, are applied to different destinations.

The conclusions drawn from the survey were discussed under two headings including the descriptive results (profile of respondents) and the exploratory results (factors that contribute to South Africa's competitiveness).

5.2.2 Conclusions from the survey (Chapter 4)

The following conclusions were drawn from Chapter 4 which, identified the factors that contribute to the competitiveness of South Africa from a demand side. See Table 5.1 for a summary of the descriptive results.

5.2.2.1 Descriptive results

This study had a sample size of 619 respondents. A basic demographic profile of the respondents was compiled (see Table 5.2). In other words, only the element with the highest percentage was recorded in Table 5.2.

Table 5.2: Summary of descriptive results

Element	Summary	Percentage/Mean
Section A		
Gender	Male	54%
Year of birth	1980	34%

Element	Summary	Percentage/Mean
Continent of residence	South America Africa	20% 20%
Frequency of visits to SA	First visit	49%
Companion travel	Individually	36%
Type of tourist	Adventure tourist	34%
Spending behaviour	Accommodation = R7 339.76	43%
South Africa's competitive prices	Attraction	3.80 (Very competitive)
Country compared to other destinations	No response	17%
Source of information	Friends and family SA Tourism Website	53% 12%
Duration of visit	8-14 days	34%
Person who initiated the visit to South Africa	Self	37%
Reason for visit	Leisure tourism Adventure tourism	3.96 (Agree) 3.82 (Agree)
Attractions visited	Table Mountain	53%
Did not have the time to visit	Madikwe Game Reserve	28%
Not aware of the attraction	Lesedi African Lodge and Cultural Village	16%
Other reasons why attractions were not visited	Not enough time	54%
Memorable experience	Kruger National Park Cape Town	13% 13%
Return to SA?	Yes	96%
Justify reason for returning or not	Yes: Amazing country No: No safety Crime	29% 2% 2%
Star rating of accommodation	3 Stars	31%
Is SA safe?	Yes No	84% 16%
Why not?	Crime	5%
Section B		
Strengths and weaknesses of SA	Strengths: Variety and availability of fauna and flora	96%
	Availability of wildlife in the area?	96%
	Weaknesses: Safety and security	62%
Importance of factors contributing to destination competitiveness	Availability of wildlife in the area	4.04 (Very important)
	Safety and security	4.03 (Very important)

Conclusions can be drawn from Table 5.2 with regard to the demographic profile of the respondents, the competitiveness aspects these respondents perceived to be important and the competitiveness aspects that remained important over the years.

5.2.2.1.1 Demographic Profile and travel behaviour

According to Table 5.2, fifty-four percent (54%) of the respondents were **male**, an average of 39 years of age and mostly twenty percent (20%) came from **South America** or **Africa** (c.f.4.4.1). Forty-nine percent (49%) of the respondents visited South Africa for the first time whilst travelling alone (thirty-six percent, 36%) (c.f.4.4.1.1.5). A significant amount of these respondents, thirty-four per cent (34%), indicated that they were **adventure tourists** (c.f.4.4.1.1.6). The average spending on accommodation, which was the element indicated by most of the respondents, were Forty-three percent (43%) (**R7, 339.76**) (c.f.4.4.1.1.8). The majority of the respondents, Fifty-three percent (53%) heard about South Africa's tourism from **friends and family**, but thirty-seven percent (37%) **initiated the trip themselves**. The reason for most of these respondents' visits were for **leisure tourism** (M=3.96) or **adventure tourism** (M=3.82) (c.f.4.4.1.1.13). A vast majority, ninety-six percent (96%) of the respondents want to **return** to South Africa, for reasons such as 'it is an amazing country', which was indicated by 29% of the respondents (c.f.4.4.1) (c.f.4.4.1.1.17)

5.2.2.1.2 Aspects of tourism competitiveness

The following part of the results includes the main aim of this study, which was to determine the competitiveness aspects of competitiveness. Before these results were obtained, through a factor analysis, it was first essential to establish the mean values and standard deviation of importance of each competitiveness aspect, which were obtained from the answers in the questionnaire. The top three most important competitiveness aspects for South Africa were **availability of wildlife in the area, safety and security** and **hospitality of people**, e.g. friendliness.

These aspects were indicated by the respondents as the three aspects that they considered extremely important for South Africa's competitiveness.

This was followed by a temporal analysis of the aspects identified in this study. This temporal analysis was conducted to compare different studies with one another regarding the period and approaches (c.f. 4.4.2.2). These studies (dissertations) were conducted by authors with a view to attain their Master's degrees and investigated the competitiveness factors of South Africa, but from a supply side (c.f.4.4.2.2). Two analyses were performed to compare the aspects with the different studies as well as the strengths and weaknesses of South Africa's competitiveness:

5.2.2.1.3. Temporal analysis

The results from the temporal analysis indicated that the studies in 2002 and 2015 (supply side) both indicated that **safety, quality of service** as well as **value for money** were the top three most important competitiveness aspects. However, the results of this current study (2018 from a demand side) did not rank these three aspects as being the most important, except for the aspect **safety and security**, which was the third most important aspect, but was the most important aspect from a supply side (c.f.4.4.2.1). Therefore the aspect **safety and security** remains essential in all three of the studies (c.f.4.4.2.1). The aspects indicated in Table 5.3 are those that were important in all three of the studies. It is clear from Table

5.3 that regardless of the time that has passed or the approach followed by the researchers, three aspects remain important. These aspects include: **safety and security**, **value for money** and **attitude towards tourists**. The results depicted in Table 5.3 partially concur with those reported in literature (c.f.4.4.2.2.1). As seen in Table 5.3 the safety aspect is identified several times in literature and is also considered important from a supply and demand side

Table 5.3: Temporal analysis of important aspects of tourism competitiveness for South Africa

Supply		Demand	Literature in Chapter 3
2002	2015	2018	2000-2016
du Plessis	van der Merwe	Current	Various authors
Safety	Safety and security	Safety and security	Safety
Attitude towards tourists	Locals' attitude towards tourists	Hospitality of people, eg. Friendliness	Events
Value for money	Value for money	Value for money (affordability)	Infrastructure
Geographical features	Quality of experience on offer	Availability of wildlife in the area	Activities
Quality of service	Quality of tourism services	Unique scenery	Quality of service

In this section, the analysed strengths and weaknesses of South Africa are reported (c.f.4.4.2.3). Authors emphasised the importance of analysing strengths and weaknesses of a destination. Table 5.4 comprises the strengths and weaknesses that emerged in all the studies (2002, 2015 and 2018).

Table 5.4: Temporal analysis of the strengths and weaknesses of South Africa identified in all the studies

Date	Strengths (Supply + Demand)	Weaknesses (Supply + Demand)
2002, 2015 & 2018	Geographical features Availability or quality of accommodation Scenery	Safety Public transportation

Table 5.4 signifies that the aspects identified as essential strengths in the three studies were **geographical features**, **availability or quality of accommodation** as well as **scenery**. These were the aspects that remained strengths of South Africa regardless of the period that has passed or the respondents that were used for the different studies. It is evident that the results of the different studies cannot be 100% similar to one another, because in the first place in two of the studies the respondents were from the tourism industry, and in the other study the respondents were tourists visiting South Africa. It is however still interesting that even though the approaches differ, the respondents all identified those three strengths.

On the other hand, each destination will always have particular strengths and together with these will come weaknesses (c.f.4.4.2.3). The weaknesses, in this case, included **safety** and **public transport** in South Africa. The public transport aspect included the costs involved with using public transportation such as buses or trains and it also included the effectiveness of the transport. In other words, whether it is always functioning and on time. Even in 2002 public transport was a problem for South Africa and this weakness did not improve in 2018 either, not to mention the safety aspect of South Africa. It is evident that the safety factor is very important for the competitiveness of a destination. However, at the moment safety is still

seen as a weakness of the destination, which directly influences its competitiveness. The following section includes the conclusions pertaining to the exploratory results.

5.2.2.2 Exploratory results

The following section focussed on the competitiveness factors of South Africa as a tourist destination.

5.2.2.2.1 Conclusions drawn from the exploratory factor analysis

An exploratory factor analysis was conducted to investigate the competitiveness aspects/factors of South Africa as a tourist destination. The following factors were identified:

- *Unique tourism attributes (1st) (c.f.4.4.2.1)*

Out of the five factors, this was regarded the most important one for competitiveness. The aspects in this factor are unique to South Africa.

- *Tourism services (2nd) (c.f.4.4.2.1)*

These aspects included tourism service providers interacting directly with the respondents (tourists) and providing a service. It is crucial for a quality experience is given to be offered tourists and this could be conducted by achieved excellent tourism services.

- *Locality (3rd) (c.f.4.4.2.1)*

. Within this factor, all of the aspects are external and are not controlled by tourism product owners.

- *Risk and quality (4th) (c.f.4.4.2.1)*

. This factor indicates that tourists want to have a quality experience, but at the same time feel safe at the destination they are visiting.

- *Entertainment and amenities (5th) (c.f.4.4.2.1)*

This factor was rated as the least important for South Africa's competitiveness even though some authors indicated the aspects within the factor as being important for other destinations.

It is clear from these results that foreign tourists visiting South Africa rated aspects unique to South Africa as an important competitive factor of the destination. Thus, one can concur with the previous statement that competitiveness factors are destination-specific.

5.3 Findings and Recommendations

The following section contains the recommendations that were formulated from the results of this study:

5.3.1 General recommendations

The following findings and recommendations are made in order to assist government, Destination Marketing Organisations (DMOs) and other tourism role players with the marketing and managing of South Africa, as a competitive tourist destination:

- More than half of the respondents indicated that they visited South Africa for leisure purposes and that the aspect “climate” is seen as a strength for the destination. The first recommendation is that **DMOs** could advertise the different beaches in South Africa, where tourists can tan in the hot sun or swim in the ocean. Therefore, marketing the pleasant weather in South Africa and emphasising the “relaxing” concept in the marketing campaign by indicating other relaxation options in the country such as the resorts and spas.
- The demand (tourists’ opinions) side indicated the external aspects of competitiveness such as availability of wildlife in the area and unique scenery to be crucial competitiveness aspects. The supply (tour operators’ or other tourism experts’ opinions) side on the other hand, indicated internal aspect as important such as quality of service. In other words, the demand side focussed on destination attributes and the supply side focussed on managerial aspects. The second recommendation is that **DMOs**, who wish to market South Africa as a competitive destination must take both the supply (external) and demand (internal) side’s competitiveness aspects into consideration with a view to improve the destination’s competitiveness. Viewed objectively, the DMOs who strive to improve the marketing of the competitiveness destination should not only focus on showing the quality services exclusively, but also strive to display the availability of wildlife or availability of scenery opportunities in South Africa.
- The external aspects such as safety, unique scenery and availability of wildlife are aspects that government and other tourism role players can strive to improve on. The third recommendation is that tourists can be encouraged to become part of the conservation processes of South Africa for example saving the Rhino or the African impact-conservation South Africa projects.
- The safety and security aspect was identified as the second most important competitiveness aspect in 2018 as well as the biggest weakness of South Africa. It was also identified as an essential competitiveness aspect in du Plessis’ (2002) and van der Merwe’s (2015) studies which means in 16 years’ time the safety and security of South Africa still remained the same and did not improve so as to be a strength. The fourth recommendation is that **government** should aim to change the image of the safety and security of South Africa by adding police workers or other security companies to the marketing videos. This will put international tourists at ease when deciding to visit South Africa, because they see the policemen in the areas where they might not feel safe.
- The majority of the respondents of this study indicated that they felt safe whilst visiting South Africa, even though safety was still identified as a weakness. The fifth recommendation is that Port of entries such as OR Tambo should be the focus point of government to ensure tourists are arriving in a safe environment and the security of their belongings is guaranteed.

- The sixth recommendation is that product owners should improve their own facility's safety. Respondents indicated the safety aspect as a huge weakness of South Africa and therefore owners of hotels, attractions and resorts should implement safety measures such as electric fencing, alarm systems and safety guards who walk around the parameter. The police should play a more important role by being more visible to tourists in the streets, especially in dangerous areas. There should also be information sessions for the police about the tourists that are visiting South Africa and to how to be more empathetic and friendly towards them.
- The majority of the respondents indicated that it is extremely important for South Africa's competitiveness that the local community or employees should be friendly towards them (hospitality of the people) as well as deliver products or services that are value for money. The seventh recommendation is that **Tourism business managers** such as hotel managers, travel agency managers or even restaurant managers should pay more attention to the quality of service provided by their employees (service speed and professionalism) in order to provide a value for money experience built on a foundation of friendliness and hospitality. Together with the requirement of feeling safe, tourists want to feel at home and not feel exploited by having to pay exuberant prices as compared to other destinations. Therefore, hotels, guesthouses or restaurant owners should not only ensure excellent service, but ensure that their employees are friendly at all times and offer services that ensure value for money and make the tourists feel at home.
- The quality and variety of food were not seen as a strength from the demand side, but indeed from the supply side, contrary to the findings of du Plessis (2002) and van der Merwe's (2015) studies. The tour operators perceive South Africa's diversity in food as a strength, but from the tourist's side they might not be aware of the variety of foods. The eighth recommendation is that the **DMOs** as well as marketers of the different tourism businesses in South Africa should create awareness of the variety and type of foods at the destination. This could be done by hosting and advertising more informal "food festivals" at the destination or at the hotels and restaurants where the tourists are staying or at the restaurant they are visiting. Another way of creating awareness of the quality and variety of food in South Africa is that the restaurant owners could offer a traditional South African dish each day which the tourists can taste, free of charge. This way, the tourists are exposed to a new South African dish every time they visit the restaurant.
- The historical and cultural features of South Africa are unique products to the destination, which were indicated as strengths during all three the time periods. The ninth recommendation is that **product owners** should further explore these aspects by establishing more museums, interpretation centurms and cultural villages in order to improve the competitiveness of South Africa. South Africa is rich in history and culture, which means that there are still opportunities to expand the history and culture product.
- The availability of public transport was indicated as a weakness in this study. The reason for this could be that the tourists visiting South Africa do not want to drive on their own, but rather want to use public transport. In certain areas in South Africa there are few opportunities for public transport.

The tenth recommendation is therefore, that **tourism product owners** could start offering assistant car hire services. This includes assisting the tourists in hiring and driving the cars while visiting South Africa.

5.3.2 Recommendations for future research

The following recommendations are made on the results of this study to encourage future research in this field and to ensure that the competitiveness of South Africa as a tourist destination continuously improves.

- Research should be conducted on the markets that travel to South Africa at different times of the year. The results of the current study revealed that Brazil and the United States can be further explored. By knowing exactly which market to target, one can conduct market research on that market's wants and needs and identify which activities (nature-based or adventure activities), or elements (climate or wildlife) attract them to a destination as well as which type of tourists mostly come from these specific countries. This could mean that marketing could be more destination-specific and more accurate, which leads to more visitors to South Africa. It is easier and more lucrative to target a particular market than to market in general to any markets.
- More research on competitiveness should be conducted from a demand side. As gathered from the research, the majority of the articles on tourism competitiveness were from a supply side, meaning that the respondents were the suppliers of tourism products such as tour operators and tourism business or product owners. Seeing that tourists are the consumers that pay and use the tourism products and services on offer, it is essential for researchers to therefore interview tourists visiting the country or provide them with questionnaires. This research could be conducted at tourism attractions, accommodation establishments and/or airports, seeing that these are areas where most of the tourists will be found. By obtaining the tourists' views on competitiveness, the tourism product owners will be aware of what tourists perceive as being crucial within a destination in order to be more competitive than the next destination.
- Follow-up research should be conducted on the strengths and weaknesses of South Africa from the tourist's point of view, by comparing the strengths and weaknesses with the five factors identified in this study. This could assist destination marketers in marketing the destination in compliance with the perceptions of current tourists, which could influence future tourists. Therefore, *t*-tests and ANOVAs on this data need to be conducted.
- Research should also be conducted on the domestic market. This could be done by targeting South African citizens travelling to different areas within South Africa. These results can then be compared with the results of this study in order to provide a fuller picture of what South Africa's competitiveness aspects are from different views (national and international).
- Research could be conducted on what the perceptions of tourists (foreign and local) are of the safety and security aspect. Different nationalities and cultures could have a different idea of what it means to feel safe. Therefore, firstly it is important to establish what is considered to be "safe" and what not. In other words, the respondents have to be exposed to different scenarios and then

indicate whether or not they felt safe. These scenarios could include a stranger walking close to the respondent while visiting Johannesburg or the respondent being exposed to the gangsters in the cities of South Africa. The researcher can then establish what needs to be improved in South Africa in terms of making tourists feel safer at the destination.

- A SEM (Structural Equation Modelling) analysis could be done to determine the correlations between the strengths and weaknesses and the competitiveness factors identified in this study. Therefore, the factors will be further explored and the correlation between the strength of South Africa is compared with the factors.

5.4 Challenges and limitations encountered during this study

This study posed the following challenges:

- Finding a research company that did not charge a large amount at OR Tambo to conduct the research for this study was challenging.
- It was difficult to obtain permission for the field workers to hand out the questionnaires in the desired area at the airport.
- The research company conducted the research on their own, so there was no control from the researcher's side as to which respondents were asked as well as the time they took to conduct the research.

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ANNEXURES

Annexure 1: Letter from language editor



18 November 2018

I, **Ms Cecilia van der Walt**, hereby declare that I took care of the editing of the dissertation of **Ms DF Fouché** titled ***Demand Analysis of South Africa as Competitive Tourist Destination***.

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Annexure 2: Questionnaire

COMPETITIVENESS OF SOUTH AFRICA FROM A DEMAND SIDE SECTION A: DEMOGRAPHIC PROFILE

1. Gender

M	1
F	2

2. Which year were you born?

3. Country of residence?

4. How often do you visit South Africa?

First visit	1
Annually	2
Every second year	3
Every third year	4
Other (please specify)	5

5. With whom are you travelling?

Individually	Yes	No
Group of friends	Yes	No
Friend	Yes	No
Partner	Yes	No
Spouse	Yes	No
Colleagues	Yes	No
other (please specify)	Yes	No

6. Would you consider yourself as

an adventure tourist	1
a leisure tourist	2
an eco-tourist	3
a business tourist	4
other, specify	

7. Where applicable, please estimate how much you spent on the following items during your visit to SA?

Accommodation	R
Transport	R
Sight-seeing tours/Admission to attractions	R
Food and beverages	R
Packages tours	R
Souvenieurs	R
Shopping	R
Other, specify	R
a)	R
b)	R

8. In your opinion, how competitive is South Africa's prices?

	5. Extremely competitive				
	4. Very competitive				
	3. Competitive				
	2. Somewhat				
	1. Not competitive at all				
Accommodation	1	2	3	4	5
Transport (Airline)	1	2	3	4	5
Transport	1	2	3	4	5
Food and beverages	1	2	3	4	5
Attractions	1	2	3	4	5
Souvenieurs	1	2	3	4	5
Other (Specify)	1	2	3	4	5
a)	1	2	3	4	5
b)	1	2	3	4	5

9. Which country did you compare these prices with?

10. Where did you hear about SA as a tourism destination?

a) SA Tourism Website	Yes	No
b) Websites other than SAT	Yes	No
c) Friends and family	Yes	No
d) Radio	Yes	No
e) Tv	Yes	No
f) Magazine	Yes	No
g) Previous visits	Yes	No
h) Facebook	Yes	No
i) Twitter	Yes	No
j) Other (please specify)	Yes	No

11. How long did you visit SA?

 Days

12. Who initiated the visit to South Africa?

Self	1
Friends	2
Spouse	3
Family	4
Business	5
Other, Specify:	

13. Reasons for visit?

	5. Strongly agree				
	4. Agree				
	3. Neutral				
	2. Disagree				
	1. Strongly disagree				
Sport tourism	1	2	3	4	5
Culture and history	1	2	3	4	5
Ecotourism	1	2	3	4	5
Wedding tourism	1	2	3	4	5
Adventure tourism	1	2	3	4	5
Hunting tourism	1	2	3	4	5
Business tourism	1	2	3	4	5
Culinary tourism	1	2	3	4	5
Leisure tourism	1	2	3	4	5
Other	1	2	3	4	5
Specify					

14. Have you been to the following attractions

	4. Yes			
	3. No			
	2. Not aware of attraction			
	1. Did not have the time			
Cape Point Nature Reserve	1	2	3	4
Pilansberg Game Reserve	1	2	3	4
Cango Caves	1	2	3	4
Madikwe Game Reserve	1	2	3	4
Addo Elephant Park	1	2	3	4
Goldreef City	1	2	3	4
Bloukrans bungy	1	2	3	4
Ukutla Lion Park (North-West)	1	2	3	4
Sun City and Lost City	1	2	3	4
Kruger National Park	1	2	3	4
Apartheid Museum	1	2	3	4
Taung Heritage site	1	2	3	4
Cape Vidal	1	2	3	4
Hartebeespoort Dam	1	2	3	4
Lesedi African Lodge and Cultural Village	1	2	3	4
uShaka Marine World	1	2	3	4
Elephant sanctuary	1	2	3	4
God's Window	1	2	3	4
St Lucia Estuary/iSimangaliso	1	2	3	4
Maropeng	1	2	3	4
The Drakensberg	1	2	3	4
Blyde River Canyon	1	2	3	4
Table Mountain	1	2	3	4
Cradle of Human Kind	1	2	3	4

15. If you did not visit these attractions mentioned in question 14, please indicate why?

16. What was your most memorable experience whilst visiting SA?

17. Would you return to SA?

Yes	No
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18. Please justify your answer for 17.

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19. Please indicate the star rating of the accommodation that you used during your visit to SA

No star rating	1
★	2
★ ★	3
★ ★ ★	4
★ ★ ★ ★	5
★ ★ ★ ★ ★	6

20. Would you consider SA as a safe tourism destination?

Yes	No
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21. If not, please indicate why?

SECTION B: FACTORS CONTRIBUTING TOWARDS DESTINATION COMPETITIVENESS

22. Please indicate if you consider the following as a strength or weakness for SA as a tourist destination *then*, kindly rate the importance of the factors towards global destination competitiveness

Strength	Weakness	5. Extremely important					
		4. Very important				5	
		3. Important			4		5
		2. Slightly important		3		4	
		1. Not at all important	2		3		4
		1. Moderate climate		1		2	
		2. Unique scenery	1	2	3	4	5
		3. Variety and availability of fauna and flora	1	2	3	4	5
		4. Availability of wildlife in the area?	1	2	3	4	5
		5. Availability of World Heritage Sites	1	2	3	4	5
		6. Different languages spoken in SA (11)	1	2	3	4	5
		7. Exposure to diversity and history of cultures	1	2	3	4	5
		8. Hospitality of people eg friendliness	1	2	3	4	5
		9. Mix of recreation activities eg hiking	1	2	3	4	5
		10. Availability of adventure in tourism	1	2	3	4	5
		11. Special events hosted in the area	1	2	3	4	5
		12. Provision of entertainment choices	1	2	3	4	5
		13. Quality and availability of supra structures	1	2	3	4	5
		14. Availability of water and electricity	1	2	3	4	5
		15. Safety and security	1	2	3	4	5
		16. Availability of internet	1	2	3	4	5
		17. Availability of car rental services	1	2	3	4	5
		18. Effectiveness and cost of public transport	1	2	3	4	5
		19. Accessibility to South Africa and other tourism products	1	2	3	4	5
		20. Variety of accommodation establishments	1	2	3	4	5
		21. Quality of destination's service	1	2	3	4	5
		22. Value for money of SA (affordability)	1	2	3	4	5
		23. Long-haul destination	1	2	3	4	5
		24. Short-haul destination	1	2	3	4	5
		25. Awareness/image/brand	1	2	3	4	5
		26. Quality of food and wine	1	2	3	4	5
		27. Variety of food and wine	1	2	3	4	5
		28. Positive foreign exchange	1	2	3	4	5
		29. Quality of tourism products and services	1	2	3	4	5
		30. Variety of vacation packages	1	2	3	4	5
		31. Destination's ability to manage risks	1	2	3	4	5
		32. Political stability	1	2	3	4	5

23. Rank your preference in terms of the following destinations-1 lowest and 4 highest

Sea	
Mountain	
Bush	
Desert	

24. Which port of entry to South Africa was used? eg OR Tambo