



Explore changes in the aspects fundamental to the competitiveness of South Africa as a preferred tourist destination

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Background: Tourism is an evolving and changing industry, and keeping up with these changes requires an understanding of the forces and changes that shape this industry's outcomes. Tourism managers struggle daily to stay ahead in the competition to attract more tourists to destinations. Understanding the strengths and weaknesses of the past could shed light on the advantages of the future.

Aim: The aim of this study was to do a temporal analysis of the competitiveness of South Africa as a tourism destination.

Setting: This research investigated the competitive position of South Africa as a tourism destination just after the 1994 elections and compared those results to the results of a similar study in 2014.

Methods: In this article, a frequency analysis revealed South Africa's strengths and weaknesses, after which *t*-tests indicated the relationship between the strengths and weaknesses of the destination and the factors that contribute to South Africa's competitiveness.

Results: South Africa's strengths include the quality of the food and experience, scenery, variety of accommodation climate and geographical features. It is clear that respondents identified different attributes that contributed to the strengths of the destination in comparison with 2002, where the strengths were wildlife, scenery, cultural diversity, climate, value for money, variety of attractions and specific icons.

Conclusion: This research is valuable for South Africa because it informs tourism role players about what respondents perceive to be South Africa's strengths. Role players can then form strategies that incorporate the strengths to create competitive advantage. This article also indicates the areas in which the country has grown in the past decade as well as indicating which weaknesses remain a problem.

Introduction

Tourism has become one of the most important economic sectors in the world (Heath 2002; Salman & Hasim 2012), and more and more countries recognise the value of tourism revenue (Crouch 2010; Heath 2003). International tourism 'continuously transfers consumer tastes, cultural practices, business people, and capital' to destinations across the world (Salman & Hasim 2012). Thus, destinations are constantly in competition with one another to acquire their share of the foreign exchange that international tourists bring into the country (Pavlic, Peruric & Portolan 2011). Because of the competition and economic welfare that international tourism creates, more destinations are focusing their attention on improving their competitive position (Gomezelj & Mihalič 2008; Heath 2003; Pavlic et al. 2011; Ribes, Rodríguez & Jiménez 2011; Salman & Hasim 2012; Zhang & Jensen 2011). Since 1994, South Africa has also experienced a growing tourism sector and government identified tourism as an economic pillar which could stimulate employment, increase exports, endorse infrastructure development, generate tax income and could be seen as promoting world peace (Bendixen & Cronson 1996; Briedenhann & Wickens 2004; Naudé & Saayman 2005). However, remaining competitive in a very competitive global industry is a challenge for any country or destination.

The competitive environment continuously changes, and destinations need to adapt to the changes (Crouch 2007). Porter (1990) adds to this and stated that competitiveness is a result of the effective management of the sources of competitive advantage in the country. In the last decade, South Africa has been actively involved in the global tourism market, and although the annual

number of overnight visitors to South Africa has been steadily increasing (South African Tourism 2012:9), South Africa's competitive position has been stagnating, according to the Travel and Tourism Competitiveness Report (Blanke & Chiesa 2013). South Africa has undergone severe political, economic and tourism changes and being part of the global arena had certain impacts on our competitiveness. Currently, South Africa's competitive position in the global tourism industry still has the opportunity to improve, and a position of 64th on the global competitiveness ranking remains a challenge for the South African government and all role players involved in the tourism industry (Blanke & Chiesa 2013, Travel and Tourism Competitiveness Report 2013). To ensure a better position on this ranking list, it is important for South Africa and product owners to gain knowledge into which factors contribute to South Africa's competitiveness and what did change over the last 12 years. The question remains – what has changed and what is the implication thereof? In answering these questions, this study determined the strengths and weaknesses of the country and compares it to results found in 2002 in a study conducted by Du Plessis.

Literature study

Competitiveness is clearly a result of good management of the strengths and weaknesses of a destination (Crouch 2007; Ritchie & Crouch 2003). Destination competitiveness can be defined as

a destination's 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. (Ritchie & Crouch 2003:2)

It is clear from this definition that managing competitiveness of a destination involves managing many attributes to provide memorable experiences.

The management of these attributes can ensure a competitive advantage because competitive advantage relates to effectively consuming resources over the long term (Crouch & Ritchie 1999). Simply, managing destination attributes so that they become a destination's strength will give the destination a competitive advantage over others. Strengths and weaknesses are positive or negative aspects of the external and internal environments. By definition, a strength can be used by an organisation to do something successfully, whereas a weakness makes successful action less likely (Joyce & Woods 1996). According to this definition, a strength can be a beneficial attribute of a business that contributes to the competitiveness of the business.

This is also true for destinations since they have attributes that can ultimately ensure a competitive advantage. Ritchie and Crouch (2003:23) stated that 'competitive advantages relate to destinations' ability to use their resources effectively over the long term' and companies gain competitive advantage by constantly innovating and upgrading, because of pressure and

challenge experienced from their competitors (Porter 1990). Ritchie and Crouch's framework (2003) adds to this statement by portraying the determination of destination competitiveness by stating that a competitive advantage entails resource deployment. In other words, it involves the audit and inventory, maintenance, growth and development, and efficiency and effectiveness of a destination's attributes. Therefore, neglect in proper management of destination attributes can create a considerable obstacle in achieving competitive advantage, whereas effective management can produce a competitive advantage (Shirazi & Som 2011). Achieving competitive advantage is inextricably linked to destination management. For this reason, a destination manager requires a management strategy based on knowledge regarding the strengths and weaknesses of a destination to systematically address and improve all the attributes at hand (Dwyer & Edwards 2009; Porter 2009; Shirazi & Som 2011).

Porter states that compiling a competitive strategy requires a destination to develop its unique strengths to maintain parity with peers (Porter 2009). For this reason, Porter (1990) developed the attributes of a national competitive advantage – the diamond of competitive advantage. The diamond has four points, which, if managed interdependently, will ensure the competitiveness of a destination. The diamond as a system affects essential ingredients for achieving international competitive success: the availability of resources, the availability of information, the goals of the managers and individuals in companies and, most importantly, the pressures on companies to invest and innovate. These attributes, if managed correctly, will be a nation's strengths, but each point of the diamond is often affected by or dependent on the state of others.

Porter (1990) highlights that any business needs a strategy that aims to improve *firm strategy*, understand *structure and rivalry* as well as *demand and factor conditions and related and supporting factors*. As stipulated by the definition of a strength, the correct management of these internal and external attributes will assist in achieving success and ensure a competitive advantage. According to Porter, the internal environment of the company is about the choices the company makes such as marketing or reinventing a product. The external environment of the country relies on the physical location of the country as well as being part of a business cluster such as the accommodation industry. This means that the pressure experienced by a destination from its immediate competition in the immediate surroundings also contributes to competitiveness. Keyser (2009) adds to this by stating that the external environment can include a range of factors including

change in demand, shifting patterns in global tourism flows, changes in tourist motivation and expectation, reorganisation of the global tourism distribution system, increasing environmental awareness and activism, fluid international political relationships and security situations. (p. 154)

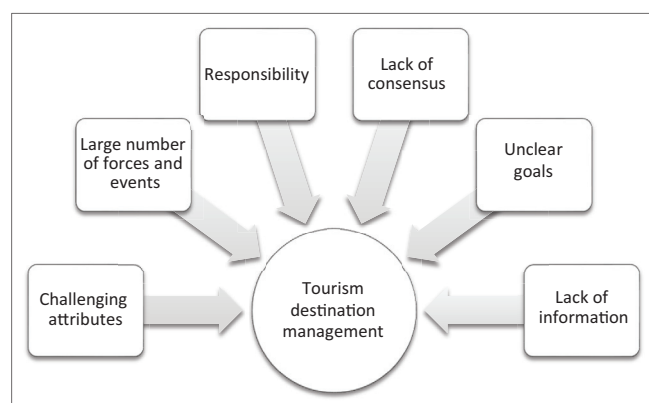
Although Porter's research is based on the competitiveness of firms and nations, it can also be applied in the tourism industry even though the tourism product is different in the

sense that you sell an experience and not a physical product that can be viewed and tested. Nonetheless, tourism destinations also have internal and external attributes that influence the tourism competitiveness of the destinations (Blanke & Chiesa 2013; Hong 2009; Ritchie & Crouch 2003). Managing these internal and external attributes of a destination is a difficult task for various reasons as indicated in Figure 1 (Crouch 2010).

According to Crouch (2010), the competitiveness of tourism destinations is influenced by a variety of forces, influences and events, many of which are very difficult to manage. Crouch (2010) states that the problem is made more difficult because destinations often do not set clear development goals against which competitive forces can be evaluated.

Because of the complexity of tourism destinations, the Travel and Tourism Competitiveness Report aims to provide insight and stimulate discussion among stakeholders on the best strategies to overcome the obstacles and to improve the competitiveness of destinations (Blanke & Chiesa 2013). The internal and external obstacles in the tourism industry as identified by the Travel and Tourism Report toughen management practices by constantly challenging them to improve. Therefore, the Travel and Tourism Report provides the most extensive list of internal and external influences on tourism destinations. This report is based on three broad categories of variables that facilitate or drive travel and tourism competitiveness (Blanke & Chiesa 2013). These three categories are: (1) the travel and tourism regulatory framework, (2) the travel and tourism business environment and infrastructure and (3) the travel and tourism human, cultural and natural resources. The Travel and Tourism Competitiveness Report aims to take all the possible internal and external factors of a destination and use the current state of those factors to determine the competitive position of each destination. The internal and external influences as summarised by the Travel and Tourism Competitiveness Report (Blanke & Chiesa 2013) are illustrated in Figure 2.

The external influences that have an influence on competitiveness include: *disruptive events, accelerating trends,*



Source: Adopted from Crouch, G., 2010, 'Destination competitiveness: Analysis of determinant attributes', *Journal of Travel Research* 50(1), 40. <https://doi.org/10.1177/0047287510362776>

FIGURE 1: Complexity of destination management.

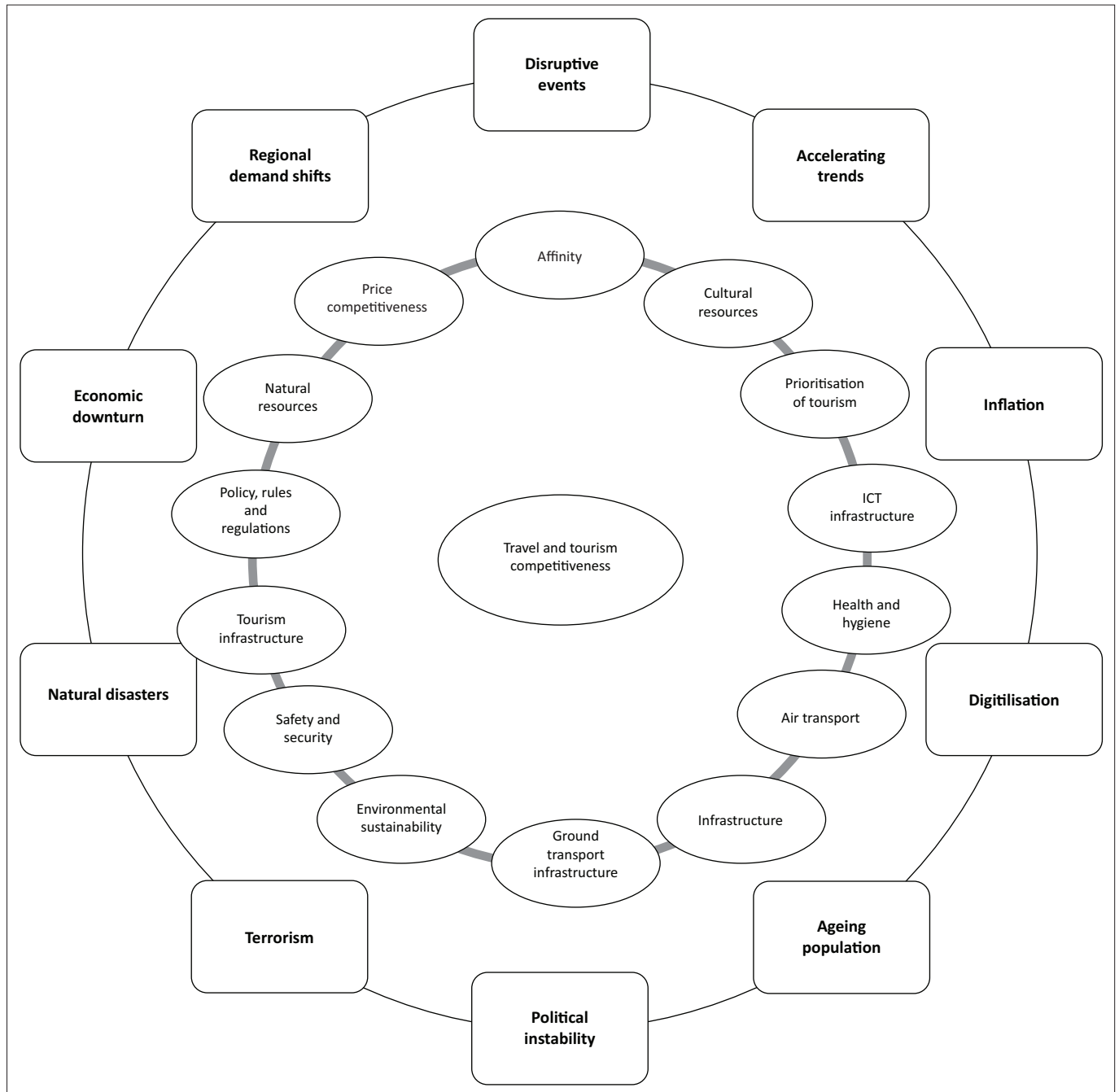
inflation and exchange rates, digitalisation or mobile devices, ageing population, political instability, terrorism, natural disasters, economic downturn and regional demand shifts.

The internal factors that influence competitiveness include: *affinity for travel and tourism, cultural measures, prioritisation of travel and tourism, ICT infrastructure, health and hygiene, air transport infrastructure, ground transport infrastructure, environmental sustainability, safety and security, tourism infrastructure, policy rules and regulations, natural resources and price competitiveness in the travel and tourism industry.*

For these attributes to be managed, destination management organisations require competitive strategies that consider the internal and external attributes of the tourism product as well as the changing nature of tourism trends. A strategy determines how a company or destination will compete in the industry, by focusing on improving what is in existence, while managing the functional areas and developing new capabilities as well as gathering resources to strengthen the company to ensure long term success (Gamble, Thompson & Peteraf 2011; Hill & Jones 2008:200; Zairi 1997:68). These strategies need to adapt as the environment changes to take into account the changing trends, threats and opportunities (Dwyer & Edwards 2009; Shirazi & Som 2011). In this regard, Hong (2009) compiled a sustainable competitiveness model for tourism industries wherein he focused on the importance of the internal and external environments of the tourism industry as well as the changing trends in tourism.

Hong (2009) also gave a deeper insight into the reallocation of different tourism attributes to achieve competitive advantages. The study aimed to take into account Ricardo's competitive advantages, Porter's competitive advantages, tourism management and environmental conditions that influence the tourism industry. Hong (2009) states that a destination should have a feasible strategy to use its competitive advantages or strengths and then developed the indicators of competitive advantage that can assist in determining the current competitive position of the destination. An indicator can be defined as a measurable variable used as a representation of an associated factor or quantity (Business Dictionary 2014).

All the above studies focused primarily on First World countries, and the results of this research are not always applicable in the African context. Heath (2002), however, developed a model for sustainable competitiveness for Southern Africa. The author stated that factors such as changing consumer preferences, the increasing involvement of host communities, safety and health concerns, globalisation of the airline industry, technological innovation and environmental pressures are changing the tourism industry; therefore, he focused on addressing the key challenges of the African continent. His model aimed to alleviate key African challenges such as poverty alleviation through tourism growth.



Source: Adapted from Blanke, J. & Chiesa, T., 2013, *Travel and tourism competitiveness report 2013*, World Economic Forum, Geneva, Switzerland

FIGURE 2: The internal and external attributes of competitiveness.

The key attributes developed by Heath (2002) and Hong (2009) are different in the sense that the attributes by Heath (2002) are more basic attributes that will attract tourists, whereas the key attributes by Hong (2009) are more associated with a developed country. This highlights the fact that the level of development of countries has an impact on the various attributes that have an impact and that the African situation is unique as indicated by Heath. Heath (2002) proposes that a sustainable tourism strategy can alleviate poverty because tourism is a labour intensive industry that creates job opportunities; tourists spend money that goes into the rural areas; more tourists buy more curios from informal entrepreneurs and tourism diversifies economies (Heath 2002). The challenges in South Africa are similar to

the challenges in other African countries. Thus, it continues to be a priority to develop the tourism industry to attract more tourists.

In 2002, Du Plessis did the first study to determine the competitive advantages of South Africa as a global tourism destination since the 1994 democratic election which resulted in sanctions against the country being lifted. It was clear at that time that South Africa's competitive advantages did not lie in the natural resources of the country, but lie in how those resources were managed (Du Plessis 2002:6). The focus of Du Plessis' research was to gauge the ranking of importance of the core factors in global competitiveness as identified by Porter (1990) and Ritchie and Crouch (1993). Du Plessis

(2002:102) found that the factors that were most important for South Africa as a global tourism destination were safety and security, quality of service, value for money, geographical features and attitude towards tourists. Although these factors were identified and managers and marketers could act upon them, Du Plessis (2002) found that the influence of external factors such as crime, political instability and diseases could have a great influence on these factors and could even change the importance of them. When acknowledging this, the question arises: How have external factors influenced the competitiveness of South Africa from 2002 until now?

Some factors that could have played a role in South Africa's competitive performance since 1994 are post-apartheid influences, hosting of mega events and marketing. In the 1990s, South Africa was promoted as a 'World in One Country' because of the varied cultures and natural resources. This combined with the climate and undervalued currency made South Africa a value for money destination and created great economic opportunities for South Africa (Briedenhann & Wickens 2004:73). In terms of major events, various events put South Africa on the international tourism map. After the successful hosting of the 1995 rugby World Cup, South Africa also recognised the economic value of sport-mega events such as international cricket and athletics, and used this as a signal to communicate 'international recognition in terms of economic, social and political stability' (Cornelisen & Swart 2006:109). Driven by socio-economic and political objectives, South Africa won the rights to host the 2010 FIFA World Cup (Briedenhann & Wickens 2004:74). The FIFA World Cup not only established that South Africa was capable of hosting successful mega events and hosting millions of tourists, but it also demolished the perceived inadequate safety and security measures regarding tourists that had been present since the political instability in the early 1990s (George & Swart 2012:219).

Blanke and Chiesa (2013) adds that strengths that make South Africa a desirable destination according to the Travel and Tourism Report are natural resources, cultural resources, world heritage sites, fauna and flora, creative industries, international fairs and exhibitions, infrastructure, air transport, rail quality, policy and regulations, property rights and few visa requirements. The factors that are seen as undesirable in South Africa include safety and security, level of hygiene, low physician density, access to improved sanitation, human resources, low life expectancy, high rates of communicable diseases, increased fuel prices and ticket taxes and airport charges that diminished price competitiveness.

In the study by Du Plessis (2002), the author gave respondents a list of attributes that was compiled from studies by Porter (1990) and Crouch and Ritchie (1999) and the respondents were asked to rate the attributes as strengths or weaknesses of South Africa. Du Plessis (2002) compiled a strengths, weaknesses, opportunities, threats (SWOT) analysis based on the answers to the strength and weakness questions.

Du Plessis (2002) also found that there were five aspects that were important for South Africa's attractiveness as a global destination. These were *attractions, accessibility, scenery, safety* and *accommodation*. Additionally, the author found that South Africa's five biggest draw cards at that time were the *attractions, accessibility, scenery, nature and wildlife* and *climate*.

Methodology

This section provides a brief description of the methods used to obtain, capture and analyse the data to achieve the goal of this study.

Study area

This research was carried out by means of a structured questionnaire that was emailed to international tourism operators who were familiar with South Africa as a tourism destination. The delegates who attended the Tourism Indaba 2013, held in Durban during the month of May, were targeted as well as tour operators from the Australian Tour Operators Association, the European Tour Operators Association, the German Tour Operators Association and the American Tour Operators Association as well as United Kingdom tour operators.

The questionnaire

The questionnaire was divided into three sections. Section A was a combination of open-ended and closed-ended questions that captured demographic and economic details. These included country of origin, main type of business and effect of price on business. Section B captured 36 attributes that influence destination competitiveness on a 5-point Likert scale where 1 = no opinion, 2 = no importance, 3 = some importance, 4 = important and 5 = very important. Section B was based on studies by Du Plessis (2002), Porter (1990), as well as Ritchie and Crouch (2003), Heath (2002) and Hong (2009). This section included internal and external attributes such as the location of the destination, quality of food, the friendliness of locals, marketing and communications systems. In Section C of the questionnaire, respondents were asked to rate the same 36 attributes as strengths and weaknesses of South Africa as a tourism destination.

Sampling method and survey

The research was quantitative in nature. Complete sampling was used for this research because a list of the sampling population is available and all members of the population were selected for the survey (Jennings 2001). The survey was constructed using a web-based programme, namely Adobe Form Central, and the link to the questionnaire was included in the email. The email stated who the researchers are, what the research is about and what the research is for. Over a period of 3 months, a total of 2727 questionnaires were emailed to delegates of the Tourism Indaba in Durban as well as tour operators from the Australian Tour Operators

Association, the European Tour Operators Association, the German Tour Operators Association, and the American Tour Operators Association as well as United Kingdom tour operators. An amount of 271 usable questionnaires were completed and returned. According to Cooper and Emroy (1995), this is a representative sample because 10% of the sample population is an acceptable sample for research.

Data analysis

Microsoft Excel was used to capture data and SPSS (SPSS Inc. 2012) to analyse the data. Firstly, frequencies were compiled to determine the strengths and weaknesses of South Africa as a destination, and secondly, a factor analysis was performed to identify the factors, and lastly, *t*-test analyses were performed to determine significant relationships between the strengths and weaknesses of South Africa and the factors that contribute to the competitiveness of the destination.

For the *t*-tests, *p*-values were used to further identify any significant differences between the strengths and weaknesses of South Africa and the factors that contribute to the competitiveness of South Africa. The purpose of effect size is to establish whether any differences exist between the strengths, weaknesses and the factors. Cohen (1988), Ellis and Steyn (2003) and Steyn (2009) offer the following guidelines for the interpretation of the effect sizes: small effect ($d = 0.2$), medium effect ($d = 0.5$) and large effect ($d = 0.8$). Statistically, significant differences are indicated as follows: $p \leq 0.05$; effect sizes: **small effect ($d = 0.2$), ***medium effect ($d = 0.5$) and ****large effect ($d = 0.8$).

Ethical consideration

The ethical process was followed within the University's policy and an ethical number was provided to the master study.

Results

This section provides a summary of the results.

Results of the demographic profile of respondents

Seventy-one per cent of respondents have been promoting South Africa as a tourism destination for more than 7 years, and 78% of respondents felt that South Africa is a competitive destination. The respondents could select from three main types of business regarding South Africa, and it was clear that most of the operators promote leisure tourism, nature-based tourism as well as culture and history tourism.

Results of the strengths and weaknesses of South Africa

Section C of the questionnaire captured the strengths and weaknesses of South Africa as a tourist destination (see Figure 3).

The most significant strengths and weaknesses were identified and compared to the results of Du Plessis's (2002) study and captured in Figures 4 and 5. It is, however, clear from Figure 3 that respondents consider South Africa to have more strengths than weaknesses as a tourism destination.

The opinions of respondents have changed slightly over the last decade. It is clear from the comparison that *climate* (100% – 2002/98% – 2013) and *scenery* (100% – 2002/97% – 2013) are still considered as the strongest draw cards or strengths for the country's competitive advantage. In Figure 4, it is also clear that respondents perceive value for money (*down by 18%*), ability to communicate (*down by 16%*), foreign exchange (*down by 9%*), historical and cultural features (*down by 8%*) and geographical features (*down by 6%*) not as strong as respondents has indicated in 2002, with the largest discrepancies between geographical features (97%/79%) and the ability to communicate (89%/73%). It was interesting to find that the availability and the quality of accommodation (*up by 8%*) play a more important role than in 2002. South Africa's quality food has become a greater strength as well as the country's sport and recreational opportunities and accommodation.

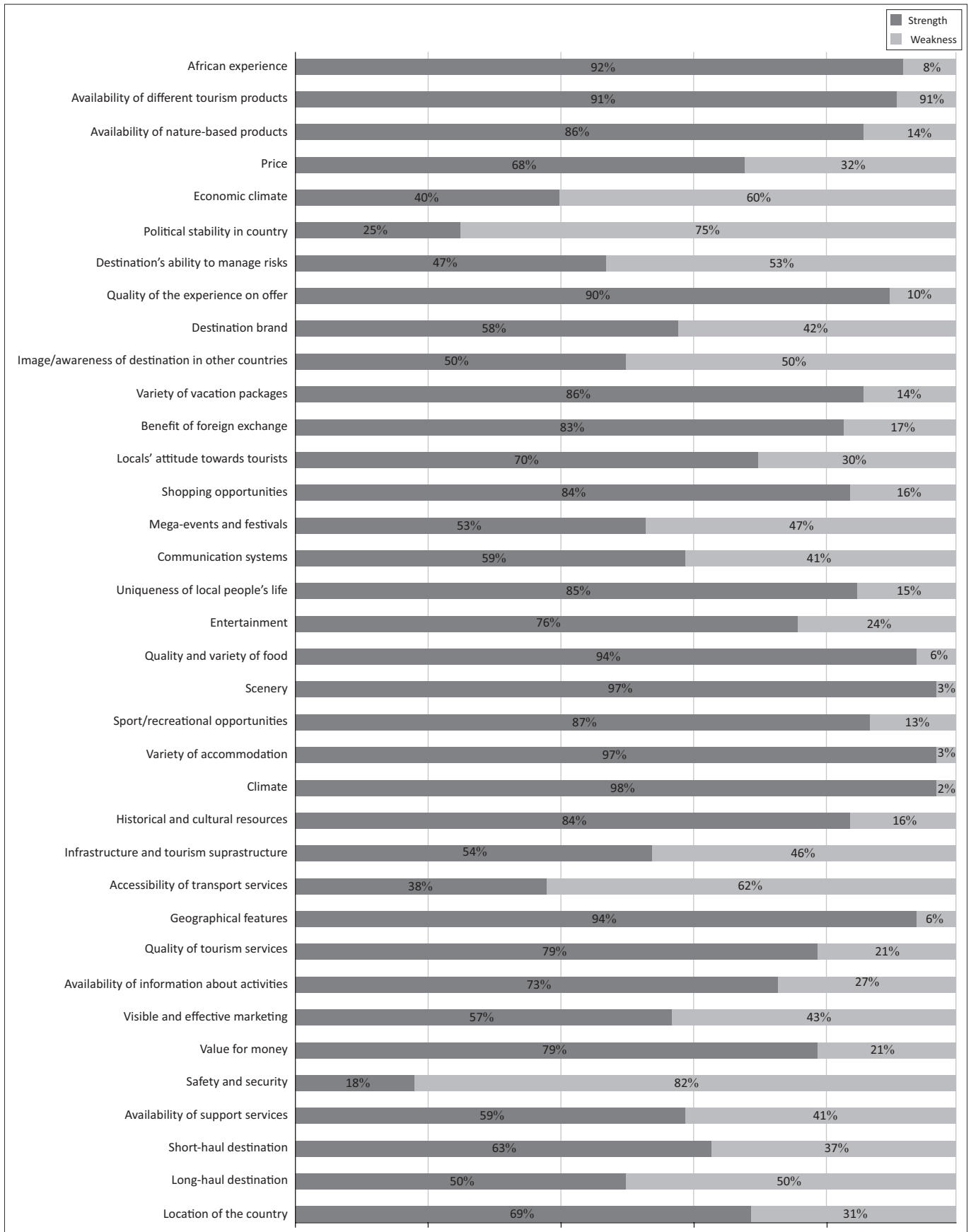
The moderate climate has always been one of the country's best assets, which confirm findings by Saayman and Saayman (2008) and the Travel and Tourism Competitiveness Report (Blanke & Chiesa 2013) concerning climate, natural resources and cultural resources as South Africa's best attractions.

Perceptions towards the weaknesses as indicated in Figure 5 show greater discrepancies as in the case of the perceptions towards strengths of the country. The greatest discrepancies were support service (*up by 44%*). Although public transport could be considered as part of these support services, it was indicated that public transport (*down by 24.67%*) was perceived better in 2013. The introduction of the Gautrain and the upgrading of public roads could have an impact on this perception. It is, however, clear the respondents felt that safety (82%) was still one of the biggest weaknesses of South Africa.

Results of the factor analysis and *t*-test

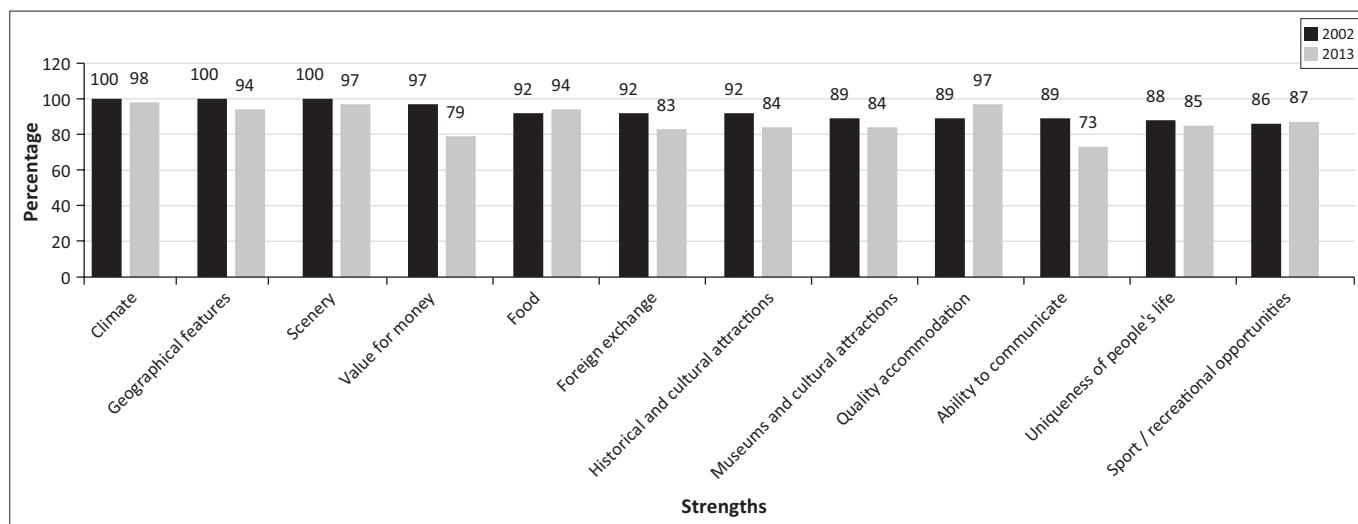
A factor analysis was conducted to identify factors of competitiveness of South Africa as a tourist destination and to determine the relation of these factors with the various strengths and weaknesses using *t*-tests. As described in Table 1, the following factors were indicated as the most important according to respondents: *stability* (mean value 4.36), *economic benefits* (mean value 4.33) and *brand and image* (mean value 4.21), and these results correlate with the studies conducted by Heath (2002) and Blanke and Chiesa (2013).

A *t*-test was applied for comparisons of competitiveness variables, using the eight factors from the factor analysis and the strengths and weakness attributes from the questionnaire. The results, in general, showed that many constructs were significant (see Table 2). *p*-values were used to identify any significant differences.



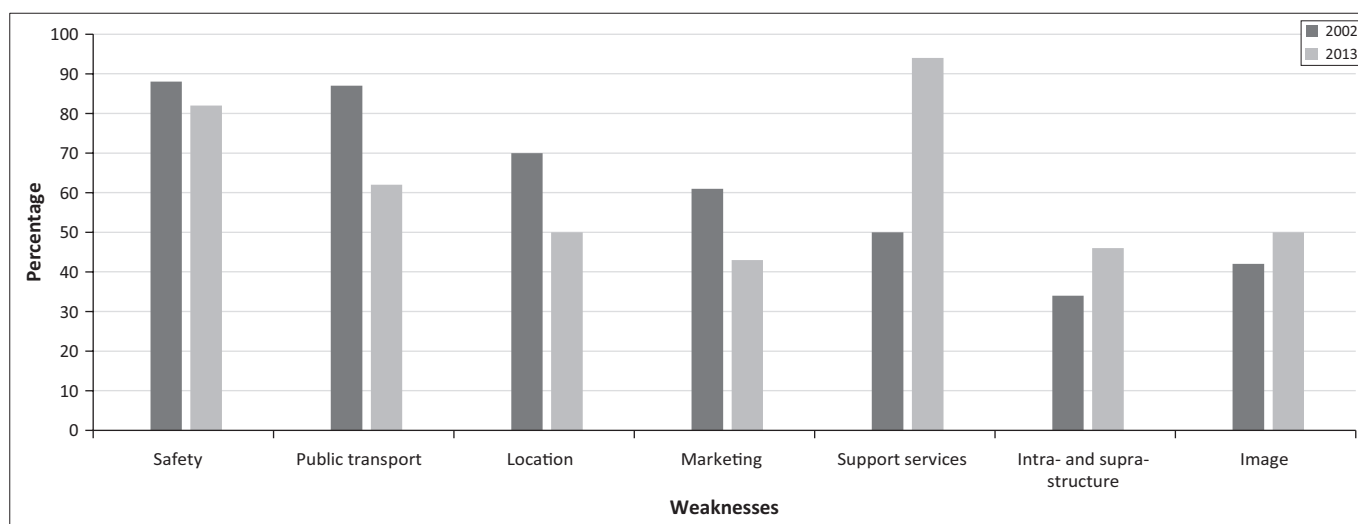
Source: Du Plessis, E., 2002, *Competitive advantages of South Africa as a tourism destination*, Unpublished master's dissertation, North-West University, Potchefstroom

FIGURE 3: Results of the strengths and weaknesses of South Africa in 2013.



Source: Du Plessis, E., 2002, *Competitive advantages of South Africa as a tourism destination*, Unpublished master's dissertation, North-West University, Potchefstroom

FIGURE 4: Comparison of South Africa's main strengths in 2002 and 2013.



Source: Du Plessis, E., 2002, *Competitive advantages of South Africa as a tourism destination*, Unpublished master's dissertation, North-West University, Potchefstroom

FIGURE 5: Comparison of South Africa's main weaknesses in 2002 and 2013.

TABLE 1: Factor analysis of competitiveness factors of South Africa as a tourist destination.

Factors of competitiveness	KMO 0.895% of variance 62.11%		
	Cronbach's alpha	Mean	Inter-item correlations
1. Tourism services	0.82	3.83	0.409
2. Location	0.65	3.74	0.388
3. Economic benefits	0.61	4.33†	0.0365
4. Attributes	0.70	3.95	0.0325
5. Entertainment and activities	0.82	3.54	0.0492
6. Stability	0.67	4.36†	0.348
7. African experience	0.70	3.98	0.375
8. Brand and image	0.73	4.21†	0.479

KMO, Kaiser-Mayer-Olkin.

†, indicates the most important factors according to the mean values.

Respondents that rated South Africa's long haul status as a strength rated tourism services as more important, implying that respondents travelling a greater extent are more aware of service provided and expect more in terms of services related to their visit. As could be expected, the respondents who felt that value for money is one of South Africa's weaknesses also

deemed the economic benefits that South Africa holds as an important factor that contributes to the competitiveness of the destination ($p = 0.002$). According to the effect sizes as well as the p -values in Table 2, respondents who felt that South Africa's geographical features were a weakness also feel that the tourism services and entertainment and activities are important for the competitiveness for the country. This supports studies by Bendixen and Cronson (1996:4), Naudé and Saayman (2005), Gomezelj and Mihalič (2008) and Lee and King (2009) who found that geographical features are important to destination competitiveness. This is, however, the first time that the link has been made between geographical features and entertainment and activities.

Respondents who indicated that historical and cultural resources are one of South Africa's strengths are also of the opinion that the African experience contributes to the competitiveness of the destination. Crouch (2007) also found that historical and cultural resources are one of the top 10 attributes that are the most important in contributing to the

TABLE 2: Results of the *t*-test for the strengths and weaknesses in relation to the competitiveness factors.

Variables	Strength			Weakness			<i>t</i> -value	Significance (two-tailed)	Effect size
	Mean	SD	<i>N</i>	Mean	SD	<i>N</i>			
Long Haul destination									
Tourism services	3.935	0.439	130	3.749	0.407	127	3.505	0.001*	0.42**
Value for money									
Economic benefits	4.285	0.560	208	4.542	0.508	55	-3.083	0.002*	0.46**
Geographical features									
Tourism services	3.823	0.437	247	4.071	0.414	16	-2.199	0.029*	0.57***
Entertainment and activities	3.528	0.667	247	3.909	0.722	16	-2.197	0.029*	0.53***
Historical and cultural resources									
African experience	4.031	0.591	222	3.716	0.641	42	2.675	0.008*	0.42**
Climate									
Attributes	3.950	0.521	261	4.320	0.481	5	-1.157	0.117	0.71***
Entertainment and activities	3.542	0.674	261	3.850	0.701	5	-1.007	0.315	0.44**
Variety of accommodation									
Attributes	3.949	0.523	259	4.178	0.544	7	-1.140	0.255	0.42**
Scenery									
Entertainment and activities	3.534	0.667	259	4.142	0.709	7	-2.378	0.018*	0.86***
Quality and variety of food									
Tourism services	3.824	0.439	251	4.017	0.363	16	-1.718	0.087	0.44*
Attributes	3.938	0.521	251	4.195	0.523	16	-1.916	0.056	0.49**
Brand and image	4.197	0.665	251	4.614	0.363	16	-2.479	0.014*	0.63***
Locals attitude towards tourists									
Entertainment and activities	3.462	0.679	186	3.735	0.621	78	-3.063	0.002*	0.40**
Quality of the experience on offer									
Tourism services	3.806	0.427	236	4.112	0.408	25	-3.416	0.001*	0.72***
Attributes	3.939	0.512	236	4.157	0.526	25	-2.018	0.045*	0.41**
Entertainment and activities	3.518	0.677	236	3.805	0.638	25	-2.014	0.045*	0.42**
Stability	4.339	0.491	236	4.630	0.421	25	-2.844	0.005*	0.59***

*, Statistically significant difference: $p \leq 0.05$; effect sizes: **, medium effect ($d = 0.5$) and ***, large effect ($d = 0.8$).

competitiveness of a destination. This also supports the research of Gouws and Roberts (2010), Yeoman (2010) and Fiorello and Bo (2012) who stated that new tourists are more sensitive and curious about culture and history than they were in the past.

Based on the effect sizes, it is clear from Table 2 that respondents who indicated that South Africa's climate is a strength rated attributes and entertainment and activities of a lesser importance than those who indicated it as a weakness. The same applies for variety of accommodation where attributes are seen as a lesser important aspect. Respondents who indicated that scenery is one of South Africa's strengths had a significant relationship to the factor entertainment and activities ($p = 0.018$) with a large effect although it is seen as less important compared to those who identified it as a weakness. The same principle applied for quality and variety of food, local attitude towards tourists and quality of the experience on offer.

Findings

The first finding is that attributes identified in 2002 by tour operators that had an influence on South Africa as a tourism destination as strengths and weaknesses were confirmed in 2013. The most important remain *climate* (98%) and *scenery* (97%) and more important as in 2002 *variety of accommodation* (97%). Although some of the percentages differ [*value for money* (18% down) and *ability to communicate* (16% down)] as strengths and [*public transportation* (24.67%), *location* (20%)

and *marketing* (18.40%)] less as weak points, dependency on support services (44% up as a weak point) was indicated as a weakness in 2013. The implication of this finding is that destination marketing organisations and government authorities should investigate the opportunities to maximise and capitalise on these attributes in an attempt to improve the country's competitive position. By cooperation between industry (tour operators, product owners, agencies and tourism organisations and government just to name but a few), the focus should be placed on policies and frameworks to address weak points as indicated.

The second finding highlights the eight competitiveness factors that were identified in this study. The three most important factors, *stability*, *economic benefits* and *brand and image*, support literature by Porter (1990) as well as Du Plessis (2002), Heath (2002), Ritchie and Crouch (2003), and Hong (2009). Literature has stated various factors that influence destination competitiveness, but it is clear that factors are unique to destinations and can change over time as was in the case of South Africa (Du Plessis 2002). This finding implies continued research towards competitiveness factors that are dependent on the changing perceptions of tourists, firm strategies, rivalry as well as demand and factor conditions and related and supporting factors as explained by Porter (1990).

The third finding reveals that external factors make the greatest contribution to South Africa's competitiveness such

as climate, scenery and geographical features. From an internal point of view, accommodation (up by 8%) has increased in importance as a strength, and it is clear that the industry adapted over the last 12 years to provide for the needs of tourists. The implication is to focus on what is strong and keep attracting people through marketing campaigns that focus on the natural diversity of the country. Results of this research could also provide destination marketing organisation with the knowledge of opportunities of the country to be addressed in future marketing plans.

The fourth finding is that safety and security as well as uncertainty of political stability of the country remains the primary factor that threatens South Africa's tourism industry like many other tourist destinations competitiveness. These results were also indicated by Du Plessis (2002), Heath (2002), Saayman and Saayman (2008) and Blanke and Chiesa (2013) (Travel and Tourism Competitiveness Report). In Porter's (1990) diamond of competitive advantage, safety and security is part of the demand conditions which constitute the standards of demand. This implies that safety and security is a standard that tourists expect from an experience just as they expect quality experiences, and it should be a priority to the government to ensure safety and security for all.

The fifth finding highlights the significance of the various factors against the strengths and weaknesses of South Africa as a tourist destination. It was the first time that the significance was indicated statistically using *t*-tests. These in-depth results could give better guidance in terms of the forces that change a destination's competitive position over time. As shown in the results, the largest effect was between *scenery* and *entertainment and activities* ($d = 0.86$), *climate* and *attributes* ($d = 0.71$) and *quality of the experience on offer* and *tourism services* ($d = 0.72$) where, in all three cases, the respondents who indicated these factors as weaknesses felt that these attributes were more important to contribute to the competitiveness of the country. It was also evident from the results that *tourism service*, *entertainment and activities* and *attributes* have been indicated to have a greater effect on competitiveness as a weak point in relation to be considered as a strength. The implication is that, with better management approaches, these internal factors could be improved by placing more emphasis on them in management plans and treating them as very important in marketing approaches to change the image.

The sixth finding highlights the importance of economic attributes such as value for money, foreign exchange and economic benefits to the competitiveness of the country. Those respondents who indicated that South Africa is a value for money destination were influenced by the economic benefits factor. The implication of this finding has a long term effect where the global economic situation will have an impact on price setting. In keeping loyal tourists and sustaining the growth of the industry, the philosophy of 'think global act local' could make a difference. Ritchie and Crouch (2003), Haarhoff (2007) and Briedenhann and Wickens (2004:73) found that the value of a destination is a

very important tourism motivating attribute. It also means that government should regulate inflation to ensure that prices do not fluctuate.

Conclusion

The importance of knowing a destination's strengths and weaknesses is continually stressed in literature concerning competitiveness (Crouch 2007; Dwyer et al. 2004:91; Enright & Newton 2005; Haugland et al. 2011; Lee & King 2009). Knowing and managing a destination's strengths and weaknesses can give a destination significant competitive advantage over its competitors.

The uniqueness of the research lies in the temporal analysis of the country as a tourism destination. These results could emphasize the relevance not only to the tourism industry but on the society of the country also benefitting from the improvements made to infrastructure, more job opportunities and the overall well-being of South African residents. By focusing on improving weak points such as crime, political instability and dependencies on support service as attributes to competitiveness could also have an influence on locals' quality of life.

Conclusively, South Africa's competitive advantage still lies in the moderate climate, geographical features, scenery, the availability of tourism products, the cuisine, African experience and the variety of accommodation. It is clear that the country possesses more strengths than weaknesses as a country which could be improved and developed in future.

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Competing interests

The authors declare that they have no financial or personal relationships that may have inappropriately influenced them in writing this article.

Authors' contributions

E.d.P. and M.S. were the main contributors to the article and A.v.d.M. contributed to the original study.

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