AN ASSESSMENT OF THE POTENTIAL OF HOT SPRING TOURISM IN LIMPOPO PROVINCE

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DECLARATION

I **Tshilidzi Whitney Munzhelele** declare that this proposal titled **"AN ASSESSMENT OF THE POTENTIAL OF HOT SPRING TOURISM IN LIMPOPO PROVINCE"** is my own product and that all sources I have used or quoted have been indicated and acknowledged by means of complete references, and this work has not been submitted for another degree at this university or any other institution.

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MUNZHELELE T.W. (Ms) **DATE**

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List of Acronyms

ADAMADE	: Administrative Management Design for Game Management Areas
Asgi-SA	: Accelerated shared growth Initiative of South Africa
APP	: Annual Performance Plan
CAMPFIRE	: Communal areas management program for indigenous resources
DEDET	: Department of Economic Development, Environment and Tourism
CPI	: Consumer Price Index
GDP	: Gross Domestic Product
CV	: Coefficient variation
IR	: Inferential Statistics
LED	: Local Economic Development
MICE	: Meeting Incentives Conferences and Events
NTA	: National Tourism Act
RETOSA	: Regional Tourism Organization of Southern Africa
SD	: Standard Deviation
SADC	: Southern African Development Community
SCT	: Sustainable Community Tourism
SPPS	: Statistical package for social science
VDC	: Venda Development Corporation
WTTC	: World Travel Tourism Council
WTO	: World Trade Organization
UNWTO	: United Nations World Tourism Organization

Abstract

Tourism is regarded as a modern day engine of growth globally. In light of this, the South African government aims to increase tourism's contribution, both direct and indirectly to the economy. In 2012 tourism in South Africa contributed 7, 9% (R189.4 billion) to Gross Domestic Product (GDP) and it is estimated to increase to R499 billion by 2020 (South Africa National Department of Tourism). The purpose of the study was to assess the sustainability of *hot spring tourism* in Limpopo Province with regard to their competitiveness and potential to contribute to the economy of the country. The study employed a Delphi technique which is designed as group communication process which aims to achieve a convergence of opinion on a specific real world issues. The research developed a set of appropriate indicators that determines hot spring destination competitiveness. Data was collected through two sets of questionnaires administered and addressed to experts in the Limpopo Department of Economic Development and Tourism; academic staff in the department of tourism at University of Venda and tourism managers and practitioners in the tourism hot spring sector. From the findings of the study, recommendations have been made to assist the Limpopo Department of Economic Development and Tourism in designing strategies to make hot spring destinations competitive and sustainable as a tourism activity in Limpopo province.

Key words: Hot Spring, Tourism, Limpopo and Competitiveness.

1. BACKGROUND OF THE STUDY.

1.1. Introduction

Tourism refers to travel for recreation, leisure, religious or business purposes, usually for a limited duration. It is commonly associated with international travel, but may also refer to travel to another place within the same country (World Trade Organization (WTO), 2010:21).Tourism contributes about 9.8 % of the world's Gross Domestic Product (GDP) and is already one of the leading exports sectors in South Africa, which is expected to have grown at an annual rate of 5.1% in 2016 and grow by 5.8 % per annum from 2016-2026, and expected to grow by ZAR211.6 billion in 2026, 11.8 % of total (World Travel and Tourism Council, 2015:2).The chapter begins with the background to the study together with justification and problem statement. The aim and objectives of the study are also outlined in this section.

1.2. Background of the study

The South African Government has identified the tourism sector as a focus of its economic development because of its potential to substantially contribute to the economy (South Africa Tourism Industry, 2010:12). Among the main attractions is the diverse picturesque culture, the game reserves and South Africa's (SA) highly regarded wine. According to South Africa Tourism Industry (2012:12), tourism provides both natural and cultural attractions to visitors along with a pleasant climate and attractive social and political milieus.

According to WTTC(2015:2) the "growth in the Travel and Tourism Industry outpaced that of the global economy of 2.8 % by US$ 7.2 trillion (9.8 %) of the global GDP in 2015 and supported 284 million jobs, equivalent to 1 in 11 jobs in the global economy".

The contribution of tourism to employment was 9.9 % in 2015 about (1.554.000 jobs). This is expected to have risen to 0.2 % in 2016 to 1.557.000 jobs and rise by 3.8 % per annum to 2.260.000 jobs in 2016 (11.9 % in total) (WTTC, 2015:2). Tourism industry in South Africa employs about 4.5. % of the total workforce and it employ more workers than the mining industry (tourism with 462 000 and mining 712 000) (Statistics South Africa, 2015:1)

In 2009, during the global economic crisis, the industry's contribution to GDP had a negative growth rate of 3 percent. This was because travel and tourism activities were reduced as tourists economised on the duration of their stay, scaled back on their expenditure and also sacrificed secondary holidays.

Tourism is an important consumer service with enormous local and international implications which includes a variety of visitors, including personal as well as business travelers and conventions, stretched over a wide range of duration of stays and, according to Ashley, de Brine, Lehr and Wilde (2007:11-12) the "growth of tourism reflects the rise in disposable income among the segment of South Africa, and the world population". Fundamentally, tourism "reflects the high income elastic demand for leisure that accompanies economic development. It is an enormous industry and forms part of the economic base of SA" (Barros and Machado, 2010:885-904).

Tourism via the establishment of hot spring resorts and protected areas "which combine conservation has been recommended as a means of economic development for many countries, especially for rural, economically depressed areas" (Strickland-Munro, Allison and Moore, 2010:449-519).

Ashley (1995:5-13)stated that "the largest segment of the tourism sector is nature-based and income generated allows for better infrastructure and protects hot springs and improves the standard of living of surrounding communities".

According to Maloney and Montes-Rojas (2001:227-280) "the standard deviation of growth rates of 'export value' for several primary commodities in comparison with tourism shows that tourism revenue is less volatile than commodity revenues, even though the tourism sector has been severely hit by a number of crises, such as international terrorism and natural disasters".

Given the considerable potential as an engine for economic growth and development, "the Regional Tourism Organisation of Southern Africa (RETOSA) comprising of15 Southern African countries has pulled together to aggressively promote the Southern African Developing Community (SADC) as a single multi-faceted tourist destination, capitalising on its common strengths and highlighting individual member state unique tourist attractions in the source markets"(Tairo,2011:1).The unique attractions in the SADC region includes "the mighty Victoria Falls, Ngoro Ngoro crater, Table Mountain, Kruger National Park and rich cultures in South Africa and Swaziland" (Tairo, 2011:1).

1.3. Statement of the problem

South Africa in general and the Limpopo Province in particular, is endowed with pristine hot spring sites which can be developed as viable tourist destinations in the SADC region(SA Tourism Industry, 2010:13).As outlined by the United Nations World Trade Organisation(UNWTO, 2015:2)"a number of destinations worldwide have opened up to, and invested in tourism, turning it into a key driver of socio-economic progress through the creation of jobs and enterprises, export revenues, and infrastructure development". This was supported by the (United Nations (UN),

2015:1) 2030 Agenda for Sustainable Development Goal Target 8.9 to “devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products” .The UN further emphasized that tourism is one of the tools to increase (by 2030) the economic benefits to developing states and least developed countries, through Sustainable Development Goals Target.

However in Limpopo, poor management of some hot spring sites, particularly in the former home land area, has led to a decline in tourism visitation and tourism’s contribution to the economy.

Natural hot and mineral springs are recognised by the tourism industry as a unique natural resource and frequently marketed in combination with other local attractions e.g. cultural, historical and geological (Erfurt-Cooper, 2011:30). The cultural and natural hot spring heritages of Limpopo Province are assets that can enable the province to compete with the rest of the world as viable tourism destination (Richardson, 2010:8).At the same time though tourists can also love the environment to death impairing the very thing that attracts them and bring about its deterioration and destruction (Wunder, 1999:13-14).Therefore resolving the challenges of sustainability in a number of hot springs sites in Limpopo Province as tourist destinations, while maintaining their environmental ambience, is important to the tourism industry and tourism researcher alike, especially given a limited and dwindling supply of pristine hot spring and with tourism demand expected to grow into the future(Choi and Sirakaya,2005:1276).

Sustainability challenges may arise as increased tourist flows create shortages that may have negative effects on the local population through increased food prices, lodging problems and water supply as experienced on Tahiti and Caribbean Islands(Richardson, 2010:8).

The key issue in this study therefore is the way in which hot spring tourism in Limpopo Province can be developed and managed, to be economically competitive and benefit the local population, while conserving the environment on which hot spring tourism depends at the same time(da Cuhna and da Cuhna, 2005:47-62).

1.4. Rationale for the study

Studies have been conducted on thermal (hot) springs on their water quality and threat of their disappearance(Kent, 1949:231-264) and (Boekstein, 1998).However no study has yet been conducted on the potential of hot spring tourism (destination competitiveness)in Limpopo Province, the Vhembe District in particular. The current study is focusing on the hot spring destination competitiveness as an avenue for Limpopo Province and South Africa in general to resuscitate dormant hot springs that can be utilised for tourism activities and generate revenue for the economy.

1.5. Purpose of the study

The main purpose of this study is to identify indicators for measuring the potential and competitiveness of hot spring tourism destinations in Limpopo.

1.6. Research questions

The study seeks to provide answers to these questions:

1.6.1. What are the available hot spring resources and attractions in Limpopo Province?

1.6.2. Which indicators can be developed to determine potential and competitiveness of hot springs in Limpopo Province?

1.6.3. What are the stakeholders' perceptions on the potential and competitiveness of hot springs?

1.6.4. What are the recommendations that can be made to assist the local government of Limpopo and the tourism industry to improve hot spring destination's potential and competitiveness?

1.7. Research objectives

The research objectives of the study are as follows:

1.7.1. To provide an overview of destination resources and attractions available in hot spring sites in Limpopo Province.

1.7.2. To identify indicators that can be used to determine the potential and competitivenessof hot spring tourism in Limpopo.

1.7.3. To analyze stakeholders' perceptions on the potential and competitiveness of hot springs tourism in selected sites using the Delphi technique.

1.7.4. To make recommendations on a framework to assist the local government of Limpopo and the tourism industry to improve hot spring destinations' potential and competitiveness.

1.8. Significance of the study

This study will be a significant endeavor in promoting hot spring tourism destination competitiveness in Limpopo Province. It will also be beneficial to the students and instructors in

tourism management when they employ effective learning in their classroom setting particularly in different concepts related to tourism branding, tourism competitiveness and tourism marketing. It will further benefit the Limpopo Department of Economic Development, Environment and Tourism (LEDET) because it will help act as an ingredient to design new strategies of developing hot springs in order for them to remain competitive and attractive. Therefore, it is expected that the study will add to a scientific understanding of the relatively unknown aspects of tourism destination competitiveness.

In addition, this study will form a basis for more research, projects and discussions among stakeholders of tourism and conservation of Limpopo Province. The study is in line with the National Tourism Sector Strategy (NTSS), 2010-2020 which is informed by the South African (SA) vision, vision 2020 of positioning SA as one of the top 20 tourism destinations globally by 2020LEDET (2012:5).

1.9. Definitions of concepts

The following concepts are defined:

Sustainable tourism

Weaver and Lawton (2010:34) refers to “tourism that meets the need of the present generation without compromising the ability of future generations to meet their own needs. In operational terms, sustainable tourism can be regarded as tourism managed in such a way that: (i) it does not exceed the environmental, social, cultural or economic carrying capacity of a given destination and (ii) economic costs minimised while related environmental, socio cultural and economic benefits are maximised”.Weaver (2006:21) suggested that “the definition should incorporate the need for operators to be financially sustainable, since tourism that is not financially viable is not likely to survive for long, no matter how viable it is from an environmental or socio-cultural perspective”.

Sustainable tourism development

Weaver and Lawton (2010:34) refers to “meeting the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetics needs can be fulfilled while maintaining cultural integrity, essential ecological process, and biological diversity and life support systems”.

Tourist cluster

Beni (2003:74) refer “to a group of highlighted tourism attractions within a limited geographic space provided with high quality equipment and services, social and political cohesion linkage between productive chain and associative culture and excellent management in company nets that bring about comparative and competitive strategic advantage”.

According to Monfort (2000:46) “tourism cluster is a group of different elements, including services carried out by tourism companies or business (lodging, restoration, travel agencies, aquatic and theme parks) richness provided by tourist holiday experiences; multidimensional gathering of interrelated companies and industries; communication and transportation infrastructures; complementary activities (commercial allotment, holiday tradition etc.) supporting service (formation and information) and natural resources and institutional policies”.

Tourism competitiveness

According to Crouch and Ritchie (2003:02) “tourism 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 and preserving the natural capital of the destination for future generations”.

Hassan (2000:239-240) defines competitiveness as “the destination`s ability to create and integrate value added products that sustain its resources while maintaining market position relative to competitors”.

The study has adopted the concept of tourism competitiveness advocated by Dupeyras and MacCallum (2013:7)who defined tourism competitiveness for a destination as “the ability of the place to optimize its attractiveness for resident and non-residents; to deliver quality; innovative and attractive (e.g. providing good value for money) tourism services to consumers; to gain market shares on the domestic and global market places while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way”.

2. ANOVERVIEW OF HOT SPRING SITES IN LIMPOPO PROVINCE.

2.1. Introduction

"Limpopo Province is situated at the north eastern corner of South Africa and shares borders with Botswana, Zimbabwe and Mozambique. It forms the link between SA and countries further afield in sub-Saharan Africa" (South African Places, 1997:1).This chapter presents an overview of the tourism resources in the Limpopo Province with particular reference to hot spring sites.

Tourism in South Africa

Tourism, according to Hinteregger (2013:5) is regarded as a modern day engine of economic growth globally. In light of this, "the South African Government aims to increase tourism's contribution, both directly and indirectly to the economy"(Taylor, Hardner and Stewart, 2006:5). According to South Africa National Department of Tourism (2012:15), in 2009 tourism in South Africa contributed 7, 9% (R189.4 billion) to Gross Domestic Product (GDP) and it is estimated to increase to R499 billion by 2020. Dwyer and Spurr (2010:45) believed that "tourism supports one in twelve jobs in South Africa and with its spectacular scenery, friendly people and world class infrastructure tourism makes South Africa one of the most desired destinations in the world".

The regional African market is South Africa's important tourist market, contributing more than 73% of total tourist arrivals and more than R50 billion in revenue in 2011 (South Africa National Department of Tourism (SANDT), 2012:4).This was supported by Taylor et al. (2006:5) who said that "domestic tourism in South Africa is also an important source of revenue and employment, contributing 52% of total tourism consumption and, on the other hand cruise and rural tourism are potentially other growth areas".

In South Africa "tourism is a priority sector in the government's planning and policy framework –it is one of the six job drivers of the New Growth Path framework. The New Growth Path framework in South Africa which was launched in 2011, aims to ensure the sector realises its full potential in terms of job creation, social inclusion, services exports and foreign exchange earnings, fostering a better understanding between people and cultures, and green transformation"(South Africa National Department of Tourism(2012:4).

Given the sector being labor intensive, it has been identified as one that is vital to ensure the country achieves its goals set out in the Accelerated and Shared Growth Initiative of South Africa (ASGI-SA), which aims to halve unemployment and poverty in the country by 2014. The Government aims to increase the tourism sector contribution to 12% in 2016 of Gross Domestic Product (GDP) which has the potential to create 400 000 jobs".

2.2. An overview of Limpopo Province hot springs.

Limpopo Province is the northernmost province of South Africa. It is named after the Limpopo River that flows along the northern border of the province (South African Places, 1997:1). The name Limpopo originated from the *Sepedi* word *diphororo tsâ meetse* – meaning strong gushing water falls. Figure 2.2.1shows the map of Limpopo Province showing major cities and towns, hot springs as well as games and nature reserve.

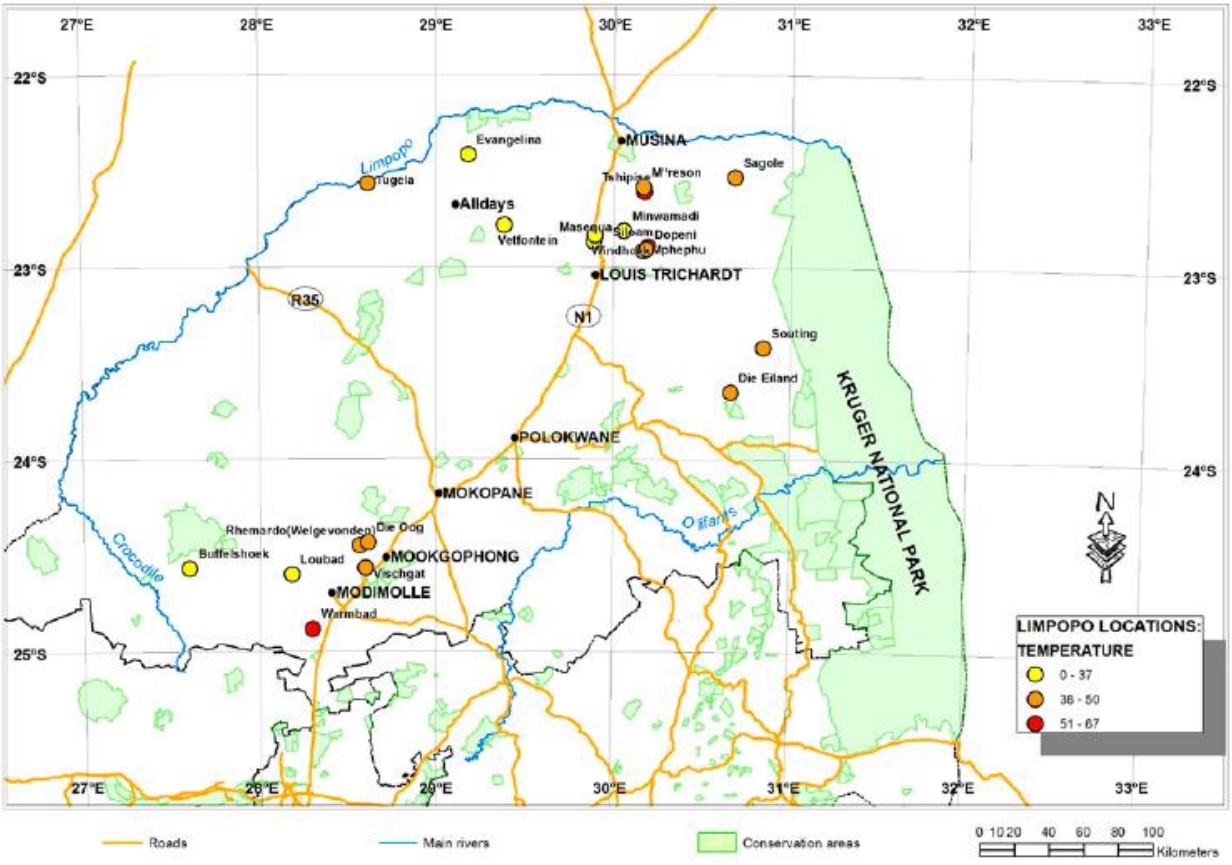

Figure 1
Location of thermal springs in Limpopo Province, South Africa
Adapted from: Kent (1949) and Boekstein (1998)

Figure 2.1.Thermal hot springs in Limpopo Province, South Africa

Source: Olivier, van Niekerk and van der Walt (2011:166).

Limpopo Province has five districts which are Mopani, Vhembe, Capricorn, Waterberg and Sekhukhune. Languages spoken in Limpopo Province are Sepedi 52. 9%, Tsonga 17. 0%, Venda 16. 7%, Afrikaans 2.6% and English 0. 3%. The province was formed from the northern region of Transvaal Province in 1994, and was initially named Northern Transvaal. In 2003, it was renamed Limpopo.

According to Inbound Tourism (2013:23-24) “Limpopo offers a mosaic of exceptional scenic landscape and fascinating cultural heritage, an abundance of wildlife species and many nature based tourist opportunities”. It is the fifth largest province of South Africa with 125 755 km^2 as

compared to the largest, the Northern Cape with 372 889 km^2 and the smallest Gauteng Province, with 16 548 km^2.The province has 5 district municipalities and 22 local municipalities with the population of 5 404 868million (10.4%) in (2011) and a GDP R256.9billion (7.3%) in (2013).

Limpopo has a rich source of natural hot springs, around which several full health spas have been developed. “At least 24 of the 83 hot springs and boreholes identified in South Africa” by Kent (1949:231-264) are located in the Limpopo Province. “They occur in two main regions, namely in the Waterberg region in the south and in the vicinity of the Soutpansberg in the north” (Olivier, Venter and Jonker, 2011:427-436).

2.3. Hot spring tourism in Limpopo Province

A spring is described as a concentrated release of ground water that appears at the surface as a current of flowing water. Springs that discharge water which have temperatures above that of the normal local ground water are called thermal or hot spring (Todd, 1980:369-375).

Many hot springs are developed into flourishing centers of religion, culture, and health such as those at Bath in England, Vichy in France and Baden-Baden in Germany. This is in addition to the increasing popularity of spas and the growing importance attached to the “natural” health industry (Smith and Puczko, 2009:17). Thermal spring waters are progressively being used for power generation, industrial processing, agriculture, aquaculture, bottled water and the extraction of rare elements (Vimmerstedt, 1998:26); (Lund, 2000:46); (Barbados Ministry of Tourism, 2001:1).

Olivier et al (2011:427-436) said that “over 90 hot springs have been identified in South Africa, of which the Limpopo Province has 20, more than any other province, of which a number of these hot springs have been developed for recreational and tourism purposes. Several of them remain in private hands for exclusive use by the land owner. However hot springs such as Tshipise tsha sagole that was economically fully developed and which is located in previous homeland continue to deteriorate as far as infrastructure and tourist visit is concern”.

A scrutiny of published materials by Rindl (1916) Janish (1931)Kent(1949)and(Winfield, 1980) and a variety of map, including topographical maps and those produced by (Kent, 1949), (Hoole, 2001) in Olivier, van Niekerk and van der Walt (2008:163-174)“indicates the existence of 20 thermal springs in the study area, namely Paddyslan; Tugela; Evangelina; Icon; Vetfontein; Masecula; Windhoek; Mphephu; Tshipise; Moreson; Sagole; Die Eiland; Sulphur springs; Stindal; Adrianskop; Masequa; Siloam; Minwamadi and Makutsi.Some of these hot springs are discussed below”.

(a) Siloam

The hot spring is situated in the Siloam village on the property of one of the members of the community. Siloam is situated approximately 2km north-east of Mphephu at the foot of the south-western flank of the Thononda mountain. The spring emerges on the bank of a small stream running through the settlement. Although the communal members indicated that neither its flow rate nor the temperature has improved over the past 40 years, measurement since 2003/4 indicated that both have decreased over the past 7 years. Mineral encrustations were observed in pipes leading from the spring (Olivier et al., 2011:427-436).

(b) Moreson (previously Gordonia)

The Moreson hot spring is located approximately 5km to the north-north west of Tshipise on the R508 road to Musina. It is presently administered as a private shareholding scheme. A total of 47 of the 50 stands have been developed, some of the units /stands can be rented from individual owners. The thermal spring has been fitted with a pump which is used to seal the swimming pool (Olivier et al., 2011:427-436).

(c) Evangelina

Evangelina was developed as a holiday resort with conference facilities. Boreholes had been sunk to augment the hot spring. Borehole and spring-water is being used to fill a large open air swimming pool. Temperature ranges from 34 -45 degree Celsius (Olivier et al., 2011:427-436).

(d) Die Eiland

Die Eiland is located in the Limpopo low-veld close to the Great Letaba River. It was utilised by local inhabitants as a source of salt long before European settlement. The salt was obtained by “lixiviating” the mud through which the water issued and evaporating the resultant solutions over open fires in clay pots (Kent, 1942:35). According to Kent (1942:35) “the spring has five eyes issuing over a distance of 30m. Temperatures of the eyes range from 37-42 degree Celsius”.

The hot spring has been developed as a resort. It boasts an indoor hydro spa with water temperature regularly at 38 degree Celsius as well as bubble jet baths and saunas (Boekstein, 1998). There are also more than 100 self-catering chalets, caravan sites, a restaurant, a few shops and many more recreational and sports facilities. It has the added tourism benefit of being surrounded by the Hans Merensky Nature Reserve and within easy driving distance of a number of other tourist attractions (Olivier et al., 2011:427-436).

(e) Minwamadi

Minwamadi lies on the Nzhelele dam, about 15km from the Willies Poort junction with the Thohoyandou road, near the village of Khakhu. The spring arises a few hundred meters from the Nzhelele River, on the west-facing flank on the Maangani range. It is completely undeveloped and seems to be known only by local communities in the immediate purlieu of the spring (Olivier et al., 2011:427-436).

(f) Tshipisetshasagole (Sagole spa)

Sagole Spa, as it is popularly known,is found at Sagole Village in the Mutale Municipality (Vhembe District). It is less than 10km from *the big tree* found at Zwigodini Madifha village (Limpopo Province). Sagole spa is a thermal spring that was discovered in the 19th century. It was developed into a recreation and tourism centre by the then Venda Development Corporation (VDC) and was officially handed over and opened by Chief P.R. Mphephu in 1979 (Tshibalo and Olivier, 2010:30-33).

The available infrastructure included swimming pools, sleeping rooms, chalets, conference and the kitchen were designed to meet the combined needs of visitors and the community. The main aim of the establishment of Sagole Spa was to provide job opportunities as well as stimulating investment for the local community and an increase in the support for conservation from local communities. Sagole spa created jobs for about 50 locals (Tshibalo and Olivier, 2010:30-33).

The Spa collapsed in 1994 after the VDC was dissolved by the democratic government of South Africa. Many local villagers lost their jobs, the number of the staff was reduced from fifty (50) to only four (4). Sagole Spa is now neglected. Infrastructure such as sleeping rooms; chalets;conference hall has deteriorated and is old that it needs serious renovations (Tshibalo and Olivier, 2010:30-33).

Tshipise tsha Sagole was funded by the Venda Development Corporation which helped a large number of people who lived in the rural areas that were excluded socially, economically and politically from the benefits of development. Sagole Spa played an increasingly significant role in helping these people out of poverty. It helped to contribute to develop the local economies where poor people live and improve their daily standard of living and conditions (Tshibalo and Olivier, 2010:30-33).

Fig: 2.2. Tshipise hot spring (Sagole)
Source: Study data 2015

Fig 2.2.A Tshipise tsha Sagole hot spring.

Villagers fetching water at the hot spring.

Figure 2.2.B. Inside the challets at Tshipise tsha Sagole

Fig: 2.2.C.The neglected outdoor swimming pools

Fig: 2.2.D.The neglected tshipise tsha Sagole

(g) Die Oog hot spring resort (Mookgophong)

Die Oog means 'the eye' in the Afrikaans language. It is situated in Mookgophong 150km from Pretoria with the temperature of 42°c. It is within the idyllic environment at the foot of the Waterberg outside the town of Naboomspruit (Mookgophong). Serolo Eco-Education program is also found in Die Oog hot spring. The Eco-Education center offers camps to schools, offering children of school going age the opportunity to experience nature first hand while learning. Also

found in Die Oog is Serolo Nature Reserve with its spectacular hiking trails, game viewing, bow hunting and bird hunting. (Olivier et al., 2011:427-436).

(h) Bela-Bela hot spring (Warmbaths)

Bela-Bela means 'boiling boiling' in the Tswana language. The resort is located 100km north of Pretoria with the temperature of 53°c. The hot spring originally was used for healing purposes by the Tswana people hundreds of years ago. Today these legendary waters have been turned into a series of fountains, pools, bathing areas at various health and holiday resorts. The diversity of facilities and outdoor activities offers everyone the ideal holiday with 45 hotel rooms, 125 chalets, camping pools, river rides, wave pools, game drives and cable skiing. (Olivier et al., 2011:427-436).

(I) Tshipise forever resort

Tshipise means 'hot spring' in Venda language. The resort is situated 105km from Kruger National Park's Pafuri gate. The spring's temperature is 65°c, the hottest in the Limpopo Province. The spring is located within the Honnet Nature Reserve, approximately 36km from Musina, just off the R525 to the Kruger National Park and 84km north east of Louis Trichardt. The Tshipise hot spring is situated at the foot of the high hill, surrounded by fairly flat terrain. It is a well-known and popular holiday resort with 58 chalets, many camping sites, a restaurant and numerous conferences and recreational facilities. (Olivier et al., 2011:427-436).

The actual spring has been changed into a tourism feature. A concrete structure with glass windows has been constructed around the source. This allows visitors to view the water as it bubbles from the ground and the variety of multi coloured algae growing on the side and floor of the spring. The wonderful healing waters are believed to soak away curses. (Olivier et al., 2011:427-436).

Figure 2.3. Tshipise (forever resorts)

Fig 2.3.A. Geographical, economic and tourism information signage

Fig: 2.3.B.Multicoloured algae on the floor of the spring.

Fig: 2.3.C. Indoor swimming pool at Tshipise Forever hot spring

Fig: 2.3.D. View of the spring through a concrete structure with glass.

Source: study data 2015

(i) Tshipise tsha vhalovhedzi (Mphephu resort)

Mphephu and Siloam lie within the Nzhelele valley which is surrounded by the Soutpansberg mountain range. It is situated on the R523 between Dzanani and Thohoyandou on the hillside of Nzhelele River bank. This hot spring is situated at the foot of the northern flank of the Tswime Mountain at an elevation of around 850m. There are two (2) eyes approximately 1.5km apart. The

western eye has been sealed off and the water used to fill the pools at the Mphephu holiday resort. A pool has subsequently been constructed at one of the eyes and the temperature of water bubbling from the ground could be measured. The second eye is undeveloped and has been used by the Dopeni community for bathing. The resort offers natural healing hot water in which people can relax. (Olivier et al., 2011:427-436).

Fig: 2.4.A. Mphephu hot spring and tourism signage

Fig: 2.4.B.Recently completed tarred road

Fig: 2.4.C. Outdoor swimming pools

Fig: 2.4.DMphephu hot spring

Source: study data 2015

(K) Unknown and undeveloped hot springs 500m from Mphephu hot spring

Fig:2.5.A. Perennial hot spring 500m from Mphephu hot spring.Men and women take turns bathing.

Fig:2.5.B.Periodic hot spring 600m from Mphephu hot spring only

Source: study data 2016.

2.4. Summary.

In terms of major Ions, only water from Minwamadi and Sagole are suitable for human consumption, the other springs having fluoride levels exceeding the recommended value of 1mg/l (South African Guidelines for Domestic Water Quality (DWAF), 1996:4).

According to SA drinking water standards, all (8) hot springs from northern part of Limpopo contain unacceptably high values of bromine while mercury levels exceed drinking water standards at Die Eiland and Moreson (Olivier et al., 2011:436).

3. LITERATURE REVIEW

3.1. Introduction

The typical purpose for reviewing existing literature is to generate research questions, to identify what is known and not known about a topic and to identify concepts of the theoretical traditions within the bodies of literature, and to describe methods of enquiry used in earlier work including their success and shortcomings (Nibabe and Mgutshini, 2014:28-30). The scope of the discussion in this chapter includes the potential of hot spring tourism competitiveness in South Africa and the world. In view of this, the researcher looked at indicators of hot spring tourism destinations, determinants of tourism, and marketing strategies of tourism destination as well as theoretical frame work which explains the several indicators that may contribute to tourism destination competitiveness.

3.2. Theoretical based literature

It is essential that factors that influence the attraction of tourists to a destination are understood before attempting to relate them to the local destination of interest in a study. Literature searches have revealed that destination competitive theory and social exchange theory can be used to identify the main factors influencing hot spring tourism destination attractiveness. Research since the early 1990s has gradually shed light on the nature and structure of destination competitiveness (Crouch, 2007:197). One of the more pressing needs for this study is to better understand the relative importance of the indicators that determines hot spring tourism destination competitiveness in Limpopo Province.(Miller, Rathouse, Scarles, Holmes and Tribe, 2010:351-362).Some of the theories are discussed below.

3.2.1. Destination competitiveness theories:

In literature, the two most popular models for analysing destination competitiveness are the Porter's model, and the Crouch and Ritchie model.

3.2.2. Porters model

The Porter's model

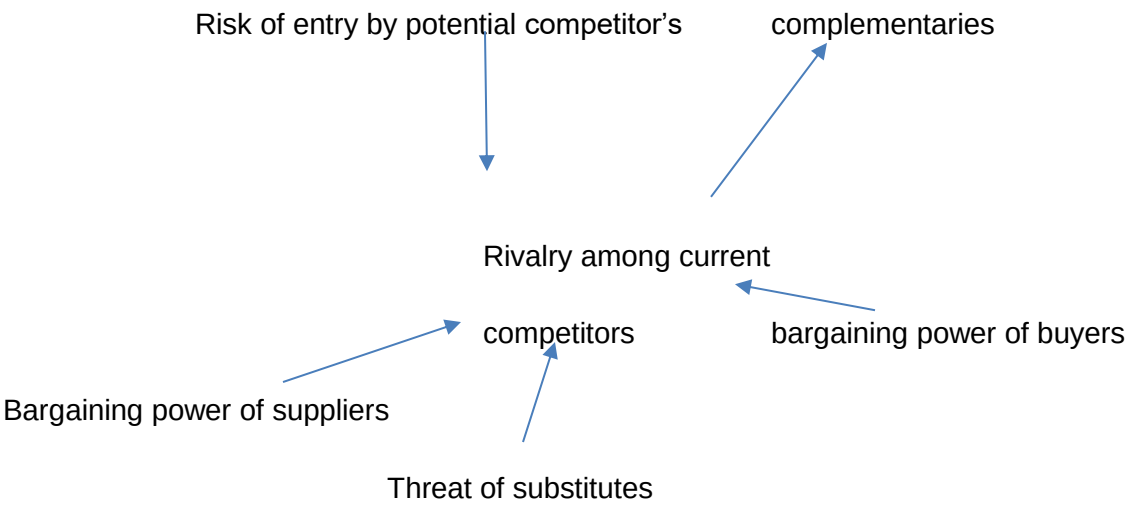

Fig: 3.1. Illustration of the Porters model

According to Porter (1990:45) six forces are important in making a destination competitive and these forces are very significant from the point of view of competitiveness strategy.

1. Risks of entry by potential competitors: According to Porter (1990:45) "entrance of new players increases industry players, encourages competition for market share and lowers costs to consumers (tourists).

2. Rivalry among current competitors: refers to the competitive struggle for market share between firms in an industry which poses a solid threat to profitability. The strength of rivalry among established firms within an industry is a function of the following factors: degree to exit barriers, amount of fixed cost, competitive structure of industry, presence of global customers, and absence of switching costs, growth rate of industry and demand conditions.

3. Bargaining power of buyers: refers to the customers who finally consume the product or who distribute the industry's product to the final consumers. It again refers to the potential of buyers to bargain down prices charged by the firms in the industry or to increase the firms cost in the industry by demanding better quality and service of product.

4. Bargaining power of suppliers: refers to the firms that provide inputs to the industry. Suppliers' potential increase in prices of inputs (labor raw material, services) may increase cost but creates employment and development value chain/intermediate industry.

5. Threat of substitute products: substitute products refers to the products having an ability of satisfying customers' needs effectively. Substitutes pose a ceiling on the potential returns of an industry by setting limit on the price that firms can charge for their product. The substitute's product has the greater opportunity for the firms to raise their product prices and earn greater profits.

6. Complementors are often considered the sixth force of Porter's model, these are companies that sell goods or services complementary to the goods or services produced in a given industry. In case of Limpopo Province the hotel accommodation industry as well as local cultural artifacts serve as complementors in the development of hot spring tourism. Therefore the presence of Porters complementors can influence the competitive structure of an industry (Porter, 1990:46).

The potential of these forces differs from industry to industry (Porter, 1990:47).These forces jointly determine the profitability of an industry because they shape the prices which can be charged, the costs which can be borne, and the investment required to compete in the industry. Before making strategic decisions, the managers should use the six forces framework to determine the competitive structure of industry (Porter, 1990:47).

3.2.3. Crouch and Ritchie model.

According to Crouch and Ritchie (2003:2) model, "competitiveness is based upon destination`s resource endowments (comparative advantage) as well as its capability to deploy resources (competitive advantage). Limpopo province has a relative comparative advantage in the endowment of hot spring sites capable of being developed as tourists' destination. The model also recognizes the impact of global macro-environmental forces (e.g. global economy, terrorism, cultural and demographic trends)".

The model seeks to achieve success by means of creating two strategic advantage, firstly, comparative advantages (based on resource endowments) are those resources from nature-as well as those accumulated over time. This includes the nation's historical and cultural resources, its economy, its human and physical resources, its knowledge and conceptual resources, the cumulative basic infrastructure which visitors expect to be available and finally, the elements of the tourism superstructure which have been put in place specifically to attract and satisfy the interests of visitors (Crouch & Ritchie, 1995:43-48).

Similarly in the Crouch and Ritchie model of destination competitiveness the effectiveness and efficiency with which a country deploys its resource endowments (or resource deployment) leads to growth and development in its tourism sector, thus contributing to the creation of competitive advantages. Together the nation's comparative advantages plus its competitive advantages in tourism creates an overall ability to compete in the tourism marketplace and ultimately the levels and types of success that it realizes in the tourism field (Crouch and Ritchie, 1995:43-48).

Components of the model

3.2.3.1. Global (macro) environment.

Macro environmental factors are often categorised into six principal groups namely those related to the economy technology, ecology, political and development, socio cultural issues and the constantly evolving demographic environment(Crouch & Ritchie, 1995:43-48) &(Hudson & Ritchie& Tumur,2004:79-94).

A tourism system is an open system and it is as such subject to many effects and pressures that arise outside the system itself, where the macro environment is global in its scope(Crouch & Ritchie, 1995:43-48).Global forces can alter the country's attractiveness to tourists, shift the pattern of wealth to create new emerging origin markets. Destination managers need to regularly monitor the environment if they are to understand the 'big picture' and anticipate and pre-empt change altering the tourism landscape. Marketers will recognise this as the need to avoid marketing myopia (Crouch & Ritchie, 1995:43-48).

3.2.3.2. The competitive (micro) environment.

According to Crouch and Ritchie (1995:43-48) a "destination's competitive (micro) environment influences tourism activities and competition, and forces that lie within the destination's immediate arena. Microenvironment includes media, government department, general public, local resident's financial institutions and active community participation which all influences destination competitiveness. These elements have a more direct immediate impact on destination competitiveness than do elements of the global (macro) environment, as a general rule".

Apart from the destination itself, the competitive (micro) environment includes other entities that together form the so called 'travel trade'. The components embrace both suppliers who are connected to tourists through tourism marketing network consisting of intermediaries and facilitators. These include tour packagers who assemble tourism products, retail travel agents, who provide information, reservation accessibility and expertise to tourism markets, specialty channellers such as inducement travel firms, corporate travel offices, and meeting and convention

planners. Customers should be the driving force in the competitive (micro) environment (Crouch & Ritchie, 1995:43-48).

3.2.3.3. Core resources and attractors.

While other components are essential for success and profitability, resources and attractors are the key motivators for visitation to a destination. These factors includes physiography and climate; culture and history, market ties, mix of activities, special events, and entertainment (Crouch & Ritchie, 1995:43-48).

3.2.4. Supporting factors and resources.

A destination with an abundance of core resources and attractions but a death of supporting factors and resources may find it very difficult to develop its tourism industry. Supporting factors provide a foundation upon which a successful tourism industry can be established. According to (Crouch &Ritchie, 1995:43-48) and (Smith, 1995:34) “one of the most important supporting factors is the condition and extent of a destination’s general infrastructure. A destination is more competitive when transportation system are reliable, efficient, clean, safe, frequent, and able to take travelers to the locations and attractions of greatest interest”.

Dwyer and Kim (2003:369-414) and Dwyer, Mellor, Livaic, Edwards & Kim, (2004:91-101) also undertook to contribute to the development of a general model of destination competitiveness, which is complementary to Crouch and Ritchie model. The primary elements of their model include resource comprising endowed resources both natural (e.g. mountains, coasts, lakes and general scenic features) and heritage (e.g. handicrafts language cuisine customs) resources created resources such as (tourism infrastructure, special event, shopping) and supporting resources such as (general infrastructure, accessibility and service quality).

Seen from a macroeconomic perspective Lumsdon (1997:57) pointed out that “tourism destination competitiveness has to be supported by the three pillars of natural resources, climate and culture”. Mihalic (2000:65-78) highlighted that “proper managerial efforts in the field of environmental quality management as well as environmental marketing activities have a great influence in growing tourism destination competitiveness”.

Palmer and Bejon (2008:74) stated that “long-term competitiveness of a tourist destination is determined to a great extent by the balance between co-operation and competition of business in tourism industry”.

Cracolici and Nijkamp (2008:336-344) used a set of six factors to “determine the competitiveness of South Italian regions as tourism destinations: natural and cultural resources, quantity and

quality of accommodation and restaurants, convenience to transportation systems, all the activities available at the destination, tourist safety, and local resident behavior". According to Smith (1995:34) "development of tourism should have cultural, physical-natural, and social characteristics that define its identity, accessibility to infrastructure, and supra-structure to guarantee high quality tourism in strategic locations near places where tourists come from". According to Enright and Newton (2005:339-350) there should also be good tourism marketing strategies put in place in order to divulge an attractive, unique and competitive image of its tourism product.

Zhang and Jensen (2007:223-243) developed a model for explaining tourism flows by adding to the price competitiveness of the natural endowments, climate geography, and cultural heritage. Heath (2002:124-141) tailored a model of destination competitiveness that consists of components which he labels 'foundations'. These include: Key attractors which are personal safety and health, enablers which are infrastructure, value adders which are location, value- for-money which is accommodation and airline capacity, and an experience enhancer which is hospitality and authentic experiences.

According to Goelder and Ritchie (2006:27), and Richardson and Fluker (2008:76) attractions, because of their crucial role in drawing tourists, are the most important marketing strategy of the tourism system, and a major factor around which the development of a destination will depend. They emphasised that the ability of attractions to draw visitors depends among other factors on their quality, quantity, diversity, uniqueness, carrying capacity, market image and accessibility. They further accentuated that attractions include specific features such as theme parks; scenery and climate (Goelder and Ritchie, 2006:27) and (Richardson and Fluker, 2008:76) emphasized that thermal waters or hot spring waters are the greatest present-day tourism attraction with therapeutic qualities.

According to the (World Trade Organisation (WTO), 2002:3) "national competitiveness in tourism sense is most effectively measured against the attributes and performance of a country's major competitors. For instance, lack of five- star hotels in the Maldives, and the abundance thereof in the Caribbean, make the latter destination more competitive than the former".

March (2004:4) outlined that "competitiveness of a destination ultimately depends on its success in attracting a greater market share of visitors from its target markets than its competitors e. g. with Canada ranked number nine (9) as the world's most popular tourism destination, the Canada Tourism Commission would place major importance on maintaining and increasing the share of its major market, which is the US drive -market".

Furthermore March (2004:4) asserted that "competitiveness is complicated because some countries are powerful brands in their own right, while other destinations are a bundle of powerful sub-brands, for example, China possesses a generic image of history, culture and pristine natural wonders as compared to New Zealand". Boo, Busser and Baloglu (2009:219-231) share a different view on what determines destination competitiveness, they maintained that destination branding is a powerful marketing tool of a country to promote distinctiveness and attract more tourists and branding process for a tourism destination is crucial for long-term destination competitiveness.

Competitiveness should not be confused with attractiveness, according to the JTB Report (2002:1)which states that destinations can be highly attractive as is Switzerland in the Japanese market but supply factors may weaken its competitiveness e.g. supply of hotel rooms Faulner, Opperman and Fredline (1999:29-31)accentuated that "experienced travel industry professionals have substantial knowledge and understanding of their customer's attitudes to, and preferences for, popular overseas destinations".

According to Palatcova, Zichova and Hrubcova (2014:203)"implementing research in more than a single destination helps to address the issue of whether measures of competitiveness are universal with respect to location. The question is whether the same determinants have the same relative importance in different destinations" (i.e. safety; location; costs and exchange rate effects).If so Tung and Ritchie (2011:1367-1386) maintained that "information from a single location can be used to understand and assess competitiveness across multiple locations, and competitiveness at diverse destinations can be compared directly".

If what is important for one destination is not important for another destination, managerial actions based on the Universalist assumptions could lead to unwanted consequences. Abe (1996:63-72), and Porter and Zacarelli (2004:7-10) believe that variables such as "attractiveness, competitiveness, economic and cultural sustainability, and quality of life are the ones that make one tourism cluster different from the others".

Then Jarque (2005:255-259) proposed the "geographical location, environmental and physical conditions, and demographical situation as indicators of tourist attraction". Royo-Vela (2009:419-428) proposed image associated with the tourist destination, tourism resources (natural, cultural, activities, infrastructure and services) as indicators that determine tourism attractiveness.

CPI is an important determinant for tourism destination competitiveness as outlined by Dupeyras & MacCallum (2013:44). They emphasised that all countries have some form of inflation assessment and real price indices to assess national competitiveness and tourism forms a significant part of this. In order to develop more effective tourism development policies, it will be

important to have a Consumer Price Index (CPI) that recognizes the travel and tourism contribution and assess the relative attractiveness of the country to consumers.

3.2.5Brian King and Cheng Fei Lee model of destination competitiveness.

The King-Lee model focuses on the determinants of destination competitiveness in the context of three major domains: tourism destination resources and attractors, tourism destination strategies, and tourism destination environment. Each domain encompasses several sub-sets of elements of destination competitiveness (57in all) drawn from the previous models of (Dwyer & Kim, 2003:369-414) and (Enright & Newton, 2004:342-343), and (Ritchie & Crouch, 2003:45).These elements have been adapted with a view to representing the specific features of the 'spa' dimension of tourism development.

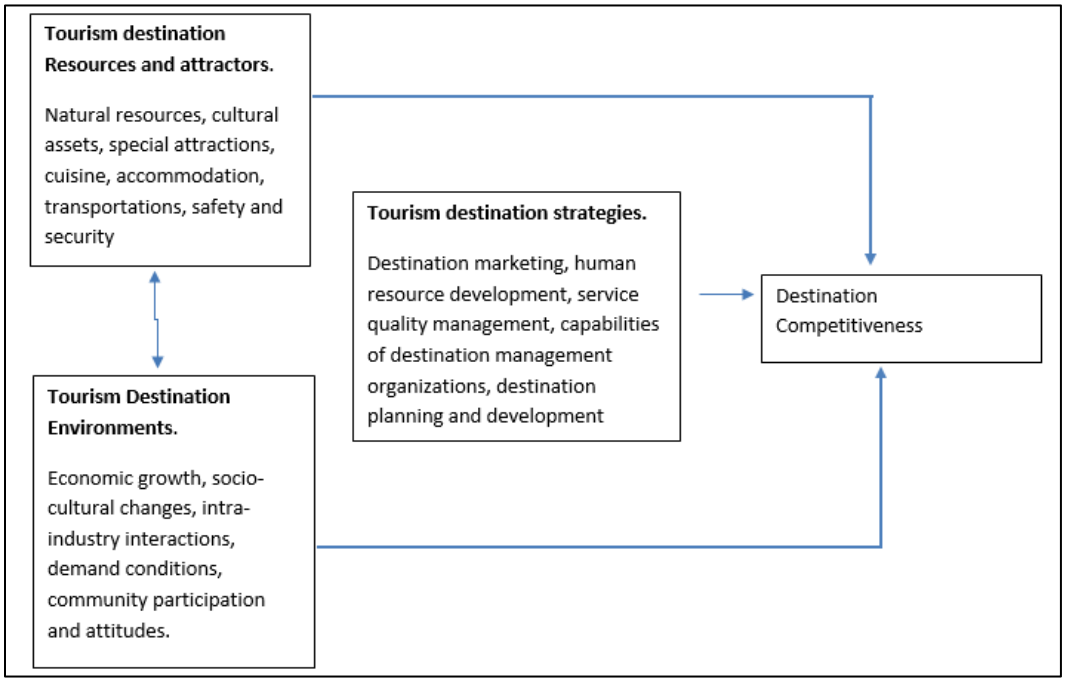

Fig 3.2. Analytical framework of tourism destination competitiveness.

Source: King and Lee (2009:243-257) model on determinants of destination competitiveness.

3.2.6. Social exchange theory

In the context of tourism, for sustainable and destination competitiveness of hot spring tourism to occur in a community, certain exchanges must take place. Local residents or entrepreneurs must

attract tourists to their community because of the desire to improve their economic and social conditions. However local residents must understand that to get the benefits, they will have to reciprocate (Kaynak & Marandu, 2006:229).

Inskeep (1991:203) said that “resources that the resident or local communities would be required to give in return, include participation in the planning, development, and hospitality to tourist attractions, extending their friendliness, courtesy, and hospitality to tourists, and tolerating inconveniences caused by tourism, such as queuing for goods and services, sharing local facilities, overcrowding and traffic congestion”. However (Rothman, 1978:83-101) differed and assumed that “these increases the cost of living and, on the other hand”(Cooke, 1982:22-28) supported him and said that “these can lead to drug abuse, vandalism, violence, sexual harassment” and (Haralambopoulous & Pizam, 1996:503-526) added that “there can be destruction in the environment”.

From an economist’s viewpoint “hot spring tourism is basically an economic activity on the part of the host country or community. Its main advantage is that it generates employment, income and foreign exchange inflows’’(Archer, Jaftar and Wall,1996:17).Its contribution to the income of an area or community is enhanced by a phenomenon known as the tourism income multiplier(TIM) which arises because money spent by tourists in the area will be re-spent by recipients, augmenting the total(Holloway, 1998:198). So, in an economy with a high proportion of leakages, such as high tax rates…or where many of the goods demanded by consumers are imported, TIM is quite low, and the locals will not benefit greatly from tourism. However (Saunders, 1996:1-11) opined that “it must be remembered that the government does reinvest its revenue raised via taxes into the local economy by building and maintaining the access road, running and staffing the schools and clinics and providing services like police so that the size and potential of the tourism industry can result in it being a major generator of taxes for governments”

3.3. Summary.

Theoretical foundation of tourism competitiveness in this study is mostly based on comparative and competitive advantage as well as social exchange theory. The literature review has laid the foundation of analytical framework of this study as well as helping to develop the methodology for our study in the next chapter.

4. RESEARCH METHODOLOGY.

4.1. Introduction.

This chapter presents the research methodology used in this study to assess the potential of hot spring tourism in the Limpopo Province. According to (Henning, van Rensburg and Smith,2004:74-78) “methodology is a coherent group of methods that balance one another and that have the ability to deliver data and findings that will reflect the research question and suit the researcher’s purpose”. The chapter is structured in sections, section 4.2 presents the theoretical/analytical framework including relevant factors that are identified in theory and hypothesized to determine the potential of hot spring tourism development in Limpopo Province, section 4.3 describes the research design including the Delphi approach in conducting research and the rationale for using this method, section 4.4 outlines a number of studies that applied the Delphi method in building consensus, section 4.5 discusses the study area, section 4.6 describes the target population for the study, section 4.7 describes the sampling procedure, section 4.8 describes the data collection process and section 4.9 discusses the measures taken to measure validity and reliability.

4.2. Relevant factors identified that determine the potential of hot spring tourism in Limpopo Province including the analytical/theoretical framework.

The analytical framework is presented as follows.

Tourism destination resources

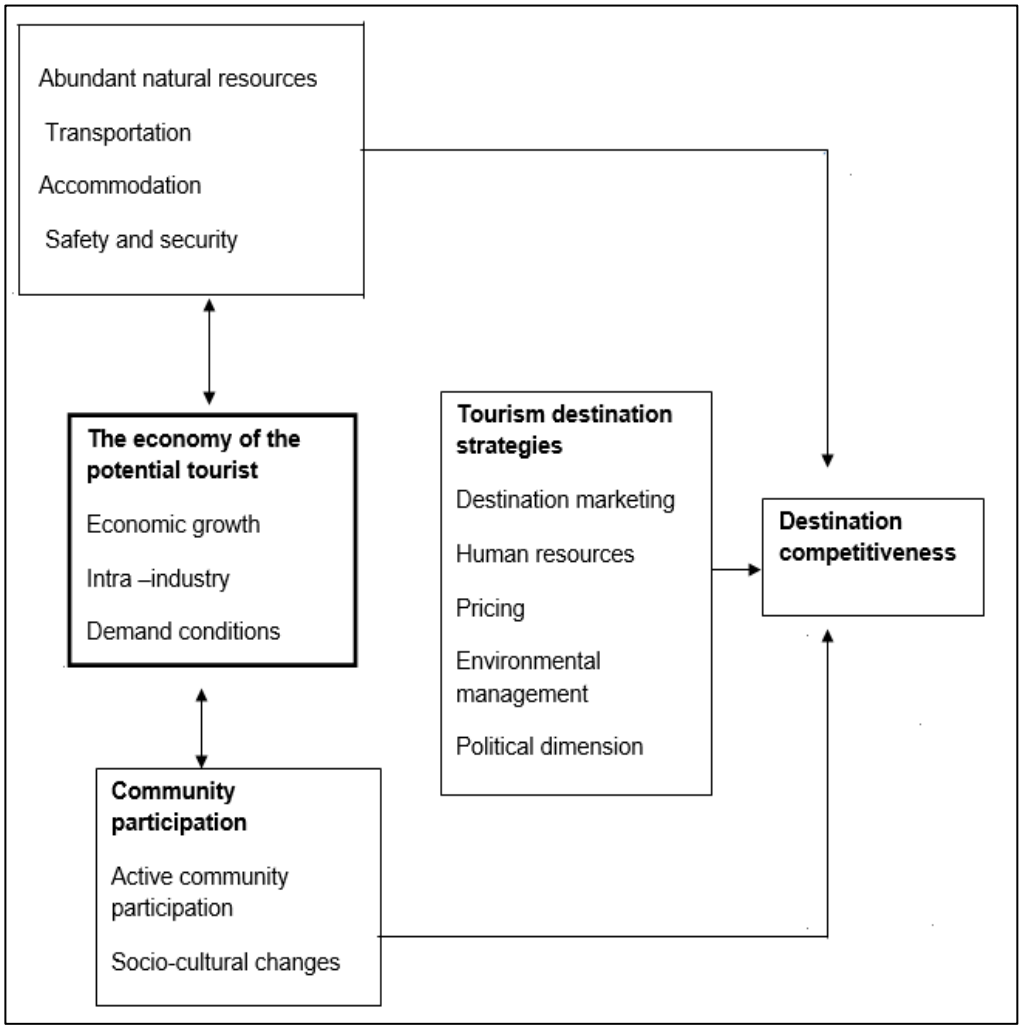

Figure 4.1.The schematic representation that shows the analytical framework for this study which is derived from the literature review and adapted from: King and Lee (2009:243-257).

Source: King and Lee (2009:243-257) model on determinants of destination competitiveness.

4.2.1. Tourism destination resources and attractions:

Inskeep (1991:200) considers destination resources and attractions as “tourism products comprise of the entire range of facilities and services offered locally, together with all socio-cultural, environmental resources and attractors”. Crouch and Ritchie (1999:43) regard tourism resources and attractors as “the crucial attributes of a destination that attract visitors and form the basic foundations of sustainable tourism”. Dwyer and Kim (2003:370) suggest that “tourism resources and attractions should be acknowledged as the basis of destination competitiveness”.

Tourism destination and resources are classified into the following.

(a) Plentiful natural hot springs.

The very existence of natural hot springs in Limpopo Province is a comparative advantage in an economic view point. These hot springs must be utilized in order to bring about regional and local economic development.

(b) Abundant natural scenery

Physical and natural attributes in hot spring sites define its character. Together, these create that natural environment within which tourists experience the destination. This natural attributes includes among other things landscape and scenery, flora and fauna.

(c) Comfortable climate

Comfortable climate sustains and supports touristic activities especially in Limpopo Province where the winter season is warmer than the rest of the country. Therefore, tourists can pilgrimage to Limpopo hot springs during winter season thereby boosting the regional GDP.

(d) Guided cultural tours

Cultural and creative resources are important elements of the tourism product and key drivers of attractiveness for a destination. Destinations that are able to offer travelers access to unique experience through local culture and the creative economy have a competitive advantage (Dupeyras and MacCallum, 2013:34).

Cultural tours at a hot spring destination can lead to the establishment of business that can generate a number of visitors and create other forms of economic development such as employment opportunities.

(e) Notable historical land mark nearby (e.g. “big tree next to Tshipisetshasagole”)

Destinations history may vary in terms of culture and uniqueness. Historical land marks such as the big tree close to Tshipisetshasagole hot spring can bring about attractiveness in a destination.

(f) Special events and festivals held on a regular basis.

The variety of special events ranges from music festival to global sporting events and destinations that pursue the development of special events as a cornerstone of their competitive advantage (Crouch, 2007:27).

(g) Sufficient availability of accommodation.

Hot spring destination must have sufficient accommodation in order to meet tourists demand.

(h) High quality and international standard accommodation.

Although the informal accommodation close to hot spring destination plays an important role in the local economy, there are many positive but hidden and underestimated contributions as well as challenges including setting consistent standards of high quality to accommodation.

(i) Comfortable accommodation in a natural setting

Hot spring must provide comfortable accommodation in order to attract international tourist to a destination.

(j) Convenient access to a hot spring area

A hot spring destination’s accessibility is a function of a variety of factors such as entry visa and permits and route connections. According to (Dupeyras and MacCallum, 2013:30) “traveler mobility is critical to trade tourism in a hot spring and plays an important role in defining the competitiveness of a destination. They further argued that convenient access which allows tourists to move freely and efficiently will have a positive impact on the competitiveness and attractiveness of a destinations and the ability of destinations to compete in an increasingly global tourism market place, and realize the tourism and economic benefits”.

(k) Reliable public transport service

Tourism destination is made up of many small to medium-sized enterprises, which are often the engine for innovation and economic development (Crouch, 2007:28).The extent to which tourism

development at hot springs advances economic prosperity and the quality of life, residents may tap into the entrepreneurial firm of providing reliable public transport.

(l) Personal safety – basic rules and responsibility

The need for safety is a driving force behind hot spring tourism destination. If potential visitors are gravely concerned about crime, the quality of drinking water, the risk of natural disasters, the standards of medical services and terrorism, a destination's competitive strengths may seem quite minor by comparison(Crouch, 2007:32).

4.2.2. Tourism destination strategies:

Dwyer and Kim (2003:400) opined that "tourism destination must serve a range of needs for tourists and tourism-related business as well as for the resident community, local business and industries".

(a) Marketing to reinforce the image of Limpopo as a hot spring holiday destination.

Collective marketing strategies with the private sector and local municipalities can be prioritized in order to increase tourist arrivals through the promotion and marketing of Limpopo Province (Limpopo Department of Economic Development, Environment and Tourism (LEDET), 2012:7). The broader application of marketing extends beyond promotion and selling alone to encompass all aspects of the marketing mix with a focus on satisfying visitor needs and wants as the primary aim of destination marketing (Crouch, 2007:28).

(b) Establishing a brand name of Limpopo as a hot spring tourism destination

According to (Pyke, Hartwell, Blake and Hemingway, 2016:101) hot spring destination must have one strong and consistent message or brand conveyed to tourists in order to remain competitive and attractive. LEDET (2012:7) stated that "the creation of a clear Limpopo tourism brand with accessible and affordable domestic tourism destinations must be established in order to create a holiday culture, especially among previously disadvantaged groups". Destinations with a clear competitive position and strong supportive branding usually perform better in gaining the attention of potential tourists (Crouch, 2007:29).

(c) Forming public-private marketing alliance for destination tourism products in Limpopo.

Ashley et al, (2007:23) said that "hot spring destination has a great deal of untapped potential to help expand economic opportunities for local communities and if hot springs managers can partner with different department and private sector, this untapped potential can be achieved".

(d) Educational institutions offering tourism management courses customised to the hot spring sector.

Education is the foundation of all advancement and economic development. Tourism as a service industry, relies on quality and high standards as part of an overall visitor experience and it is vital that education standards, transferability and transparency of qualifications are continuously improved. The industry has an important role to play in improving the quality and accessibility of education and training as far as hot spring is concerned. (Dupeyras and MacCallum, 2013:42).

(e) Tourism enterprises providing in-house training programs.

Provisions of courses and training that enables personal progression within the industry and development of the sector can also encourage more entrants and higher levels of tourism services. (Dupeyras and MacCallum, 2013:42).Crouch (2007:31) stated that “destinations must develop programs and mechanisms targeted at producing industry-specific trained employees and graduates with management skills designed to meet the specific needs of the tourism and hospitality industries”.

(f) Designing professional qualification systems for certified managing or non-managing personnel.

Preservation and development of hot spring employees is also important as an essential part of improving performance and capacity of the sector.

(g) Providing leadership for co-ordination within the sector.

Leadership and co-ordination as an indicator can assist the policy makers when they seek to improve performance, employment and output within the tourism sector through sector education base.

(h) Encouraging industry innovation of hot springs spa products and services.

Arguing from an entrepreneurial perspective, Buhalis (2000:90) has claimed that “destination competitiveness in hot springs can be enhanced through product innovation such as spa products and services”. Crouch (2007:31) suggested that “the variety and mix of activities within a hot spring destination represent a sub-component of competitiveness over which the destination does have some influence and control”.

(i) Assisting hot springs properties in licensing matters

LEDET (2012:5) in its 2012-2016 tourism strategic plan seeks to provide for the registration and licensing of qualified tourist guides in terms of the Tourism Second Amendment Act 70 of 2000 as well as registration of tourism business in the province to enable improved data collection on supply and enhance marketing of destination Limpopo.

(j) Developing a uniform grading and classification system for the sector

Assessing the potential of hot spring destinations, ordinal grading or scale are normally used. This ordinal scale (bad, poor, medium and good) is especially useful when there is a lack of consensus as to what would constitute an adequate standard (Lee-Smith, 1997:27).However, Ko (2005:65) argues that “numerical sustainability scales may be more appropriate than qualitative scales”.

(k) Creating incentives for entrepreneurial investment in hot spring areas.

A sense of enterprise, entrepreneurship and initiatives in developing new ventures in a hot spring destination, may contribute to its competitiveness.

(l) Properly designing and constructing new and existing hot spring areas.

Developing new hot springs in Limpopo for tourism and economic purposes can be seen as an effort to potentially developing or expanding tourism in a particular destination. Since in Limpopo Minwamadi and Siloam hot springs are not developed for tourism purposes, there is a significant part of development potential stemming from tourism activities that is lost. This according to Cernat and Gourdon (2007:8) is what is called “leakages or missed opportunities. They described leakages as a loss of foreign exchange and other hidden costs deriving from tourism-related activities”.

(m) Maintaining high quality hot springs spa related facilities and equipment.

A hot spring destination’s basic infrastructure includes those facilities and services that support all economic and social activity, such as roads, communication system, government services and public facilities, a reliable water supply, legal system, financial system, health systems, education, and transport system. A developed and well maintained infrastructure provides a solid basis for an effective an efficient tourism industry (Crouch, 2007:28)

(n) Ensuring the professional, technical competence and good interpersonal skills of service staff.

Hospitality and friendliness of employees toward tourists provide a competitive advantage. Visitors must feel that they are more than a source of revenue for the destination.

(o) Setting industry standards in service quality management through the periodic conduct of tourist satisfaction surveys.

Tourist satisfaction survey involves an evaluation of how the destination relates and compares to other destinations and to international tourism system. Because competitiveness is a relative concept, decisions about the most appropriate policy or strategy for developing a destination must be made in the context of what other destinations are doing and how they are performing. Destinations that surveys are in better position to strengthen those circumstances. (Crouch, 2007:30).

(p) Setting destination price based on costs invested.

According to Dupeyras and MacCallum (2013:42) the prices of the tourism components of a destination are normally weighted and aggregated according to the cost invested.

(q) Ensuring value for money in destination tourism experience.

A hot spring tourist destination must ensure value for money by providing tourists with the highest quality service products in order to remain competitive and attractive.

4.2.3. Tourism destination environments:

The potential of hot spring destination competitiveness is conditioned or limited by many influences and factors either outside the destination or with the destinations immediate arena of tourism activities and competition (Crouch and Ritchie, 1999:32). Dwyer and Kim (2003:390) view a hot spring tourism destination as “operating in the interactive and interrelated contexts of the competitive and global environments. They further said that hot spring tourism destination is influenced by a range of global forces including laws and regulations, the state of the economy, socio-cultural and demographic changes, new technology such as internet and its competitive environment is shaped by the capabilities, strategies, and competitive environment of destination firms and organization”.

(a) Increasing disposable income through economic growth.

According to Ashley et al (2007:11-12) hot spring tourism leads to economic growth which leads to increase in disposable income. This leads to expansion of economic opportunity that can benefit the local community through employment opportunities.

(b) The growing of middle class.

Tourism offers excellent access to employment opportunities for individuals at all levels of experience, qualifications and training and status. Development of employees is important and it serves as a tool to improve the middle class group.

(c) Public interest in health-leisure activities

Although hot spring destination helps to improve the economic development of the region or local communities where it is situated, the community can also enjoy other benefits such as boating, swimming, golfing, hiking, cycling and fishing.

(d) The emergence of health-conscious consumers.

Hot spring destinations can serve as a health spa such as Heviz in Hungary which attracts 220.000 guests every year who spend US$100.Heviz is well known for its therapeutic effect and a wide range prevention and cure(TOHWS, 2014:4).

(e) The media reporting of travel and tourism sector.

According to Bennet (2016:1) social media has made a huge impact on essentially every major industry across the world, and the business of travel and hospitality has reaped the rewards. Travel and tourism depends heavily on word of mouth to spread opinions and recommendations and social platforms such as face book and twitter allow tourists to easily share tips and suggestions which can be enormously valuable when positive. Moreover, Bennet (2016:1) recent study shows that “more than 52% of respondents changed their travel plans after researching their trip using social media”.

(f) The expansion of leisure and domestic tourism market.

The expansion of leisure and domestic market has been emphasized in tourism policy and government. In his debate, Hanekom (2016) the Minister of Tourism in South Africa said that the Department of Tourism is putting a great deal of effort and resources into domestic tourism. He further said that the National Department of Tourism is determined to ensure that in order to promote domestic tourism, iconic attractions are accessible and affordable to all citizens. According to Stats SA (2015) satellite account “655.000 people were directly involved in producing goods and services provided to tourists. The Minister said government was working closely with the Ministry of Small Business Development to stimulate establishment of new SMMEs”.

(g) The gradual growth of international tourism market.

There is a gradual growth of tourism contribution to global GDP of 2.8% according to WTTC (2015:4).Hot spring destination can take advantage of this growth in GDP by developing their destinations to be of high quality and standards.

(h) The active participation in hot springs planning process by community.

Crouch (2007:29) echoed that “all community leaders who participate in shaping the hot spring tourism destination contribute in helping to stimulate economic and social development, and the resultant quality of life in the destination”.

(i) The positive attitude by community towards the re-development of hot-spring tourism.

According to Crouch (2007:29) before the destination can formulate a strategic framework for tourism development, it is necessary for all stakeholders involved to decide, agree, or define just what such a strategy is being developed for. Some destination communities may feel that major resort development is quite compatible with the social and environmental nature of the destination and will provide the best opportunity for creating economic growth and jobs for younger people. Another community might hold the view that a different sort of approach to tourism development is called for.

(j) The hospitability and friendliness of residents towards tourists.

The image of a destination can take time to change even though it is of vital importance for residents to convey friendly gesture towards tourists.

4.3. Research design.

The Delphi Technique and the rationale for choosing the technique for this study.

The main aim of this study is to make an assessment of the potential of hot spring site in Limpopo as tourist destination. Given this content one needs a technique or method that asks the question about what should/ought to be done in order for hot spring site to qualify as a tourist destination. Such a question can objectively be answered by seeking the opinions of experts in the tourism sector/ industry which is the Delphi approach.

According to (Dajani, Sincoff and Tally, 1979:83-90) and (Harold and Murray, 1975:10) the Delphi technique is a widely used and accepted method for gathering data from respondents within their domain of expertise. The technique is designed as a group communication process which aims

to achieve a convergence of opinion on a specific real world issue. Predicated on the rationale that “two heads are better than one” the Delphi technique was developed by (Dalkey & Helmer, 1963:458-467) at the Rand Corporation (in the USA) in the 1950s. Whereas common surveys try to identify “what is “the Delphi technique attempts to address “what could/should be” (Miller, 2006:46).

As (Rand, 1971:2) believe that Delphi marks the beginning of a whole new field of research, which he labels “opinion technology”. The Delphi method is well suited as a means and method for consensus-building by using a series of questionnaires to collect data from a panel of experts. In contrast with other data gathering and analysis techniques, the Delphi method employs multiple iterations designed to develop a consensus of opinion concerning a specific topic.

As (Ludwig, 1994:55) indicates: Iterations “refer to a feedback process. The process is viewed as a series of rounds, in each round every participant works through a questionnaire which is returned to the researcher who collects, edit and returns to every participant a statement of the position of the whole group and the participant’s own opinion. A summation of comments makes each participant aware of the range of opinions and reasons underlying those opinions”. (Ludwig, 1994:55).

More specifically, the feedback process allows and encourages the selected Delphi participants to reassess their initial judgments about the information provided in previous iterations. Thus in a Delphi study, the results of previous iterations regarding specific statements and/or items can change or be modified by individual panel members in later iterations based on their ability to review and assess the comments and feedback provided by the other Delphi panelists. Through the operation of multiple iterations, panel members are expected to become more problem solving oriented and therefore able to offer their opinions more insightfully.

One of the advantages inherent in using the Delphi technique is expert panelist anonymity which reduces the effects of dominant individuals which often is a concern when using group-based processes such as focus group approach to collect and synthesise information. Additionally, the issue of confidentiality is facilitated by geographic dispersion of experts as well as the use of electronic communication such as e-mail to solicit and exchange information. As such, certain downsides associated with group dynamics such as manipulation or coercion to conform or adopt a certain viewpoint can be minimised (Adams, 2001:26-29; Oh, 1974; Helmer & Rescher, 1959:25-53).

The Delphi method is also amenable to statistical analysis techniques which ensure that opinions generated by each panelist are well represented in the final iteration because at the end of the exercise there may still be a significant spread of individual opinions. Thus the tools of statistical analysis allow for an objective and impartial analysis and summarisation of the collected data.

To assess the sustainability of hot springs in Limpopo Province, the Delphi technique approach is appropriate for its ability to discover stakeholders' opinions and achieve group consensus. This study is designed to address the two dimensions of tourism sustainability in Limpopo hot springs and each dimension is assessed on the basis of several indicators, (i.e. natural resource endowments, comparative advantage) and indicators such as supporting infrastructure and public service, location, accessibility, safety and local resident behavior (competitive advantage).

Following from the theoretical models reviewed from literature are the determinants (indicators) of potential destination competitiveness in hot spring tourism in Limpopo that were used in the designing of a questionnaire.

4.4. Delphi Technique in building consensus.

This study focuses on the use of the Delphi method in building consensus in practice and as a result a number of studies using Delphi technique, between years 1975 to 2013 in the scientific fields of management and business were reviewed. Since this study focuses on the use of Delphi technique in building consensus in practice it is further used in forecasting when there is no appropriate or available information and is based on the assumption that "N+1 heads are better than one"(Hill, 1982:517-539), (Nerantzidis, 2012:14) and (Rowe & Wright, 1999:353-375).

These studies are summarised in Table 4.1., focusing on the way they used Delphi and providing implications for the most controversial issues of the panel size, the Likert scale, the measure of consensus and the Delphi rounds. In the first two columns the authors and the country of research are referred. From the total of 10 studies reviewed below, two were conducted in Africa, two in America, three in Europe, one in Asia and two in Canada. The third column depicts the participation in the studies, showing that the majority uses a number of up to thirty experts.

On the issue of the use of Likert scale questions (fourth column of Table 4.1.), three studies used 5-point and two studies used 10-point scale. However, what can be extracted from the use of the Likert point scale, is that a 10-point is used when the level of importance is investigated, and when the level of agreement is investigated or in case of increase or decrease measurement, a 5-point scale is most common. The sixth column shows the statistical measure of consensus with the

studies using the standard deviation and with interquartile range, median, mean, Kendall's coefficient W, and coefficient of variation used respectively.

Finally, focusing on the number of rounds implemented for reaching consensus, the last column shows that the majority needed two to three rounds.

A number of studies have been done on tourism destination competitiveness and Table 4.1.summarises the method used and findings for these studies.

Table 4.1.Prior empirical studies of the Delphi approach.

No	Authors	Research Scope	Country	Participants	Likert-scale	Measure of consensus	Delphi Rounds
1	Kaynak, Bloom & Leibold (1994:18-29)	This study uses Delphi to analyse the future of tourism in South Africa by investigating factors which will influence the future growth of the tourism industry	South Africa	1st round:50/100 2nd round:37/50	5-point(significant increase to significant decrease) and 10-point (less important to critically important)	SD	2 rounds
2	Kaynak & Marandu (2006:227-237)	The study explore the most probable scenario for the tourism industry in Botswana by the year 2020. For this experts	Africa (Botswana)	1st round:104 2nd round:68	5-point(significant decrease to significant increase)and 10- point (no impact at all to very high impact)	SD	2 rounds

		commended on the extent of changes in societal values and ranked the expected impact these changes would have on the industry.					
3	Lee & King (2009:243-257)	The study proposes a guiding framework for the future development of hot springs tourism in Taiwan, drawing upon factors influencing the competitiveness of the sector	Asia (Taiwan)	1st round:31/36 2nd round:28/31 3rd round:26/28	5-point for significance	IR<1 & 80% responded to categories`` highest priority''(mean score above 4.5) and ``important elements'' (means score between 4 and 4.49)	3 rounds
4	Asonitis & Kostagiolas	Delphi technique was employed to	Europe	1st round:11/12	10-point for importance	CV	2 rounds

	(2010:145-161)	highlight the most important library services for the central Greek public libraries	(Greece)	2nd round:9/12			
5	Hadaya, Cassivi & Chalabi (2012:216-229)	The purpose of the study is to identify the most important IT project management resources and capabilities.	Canada	1st round:30/34 2ndround:30/30 3rd round:28/30 4th round:24/28 5th round:19/24	10-point for importance	Kendall's W	5 round
6	Lamb (1975:89-98)	This study appraises 12 research projects in the field of electricity utilization by using Delphi combined with benefit/cost rankings.	Canada	160	10-point (zero/negligible value to extremely valuable research program)	IR[1]	2 rounds

7	Green, Hunter & Moore(1990:111)	Assessment of the environmental impacts stemming from tourist projects.	Europe(UK)	Preliminary stage:40 1st round:31 2nd round:21	n/d	SD and CV[4]	2nd round and a preliminary stage
8	Fish and Piercy (1987:2)	This study used Delphi to examine the similarities and differences in the theory and practice of structural and strategic family therapy.	USA	32	7-point for agreement	IR, median	3 rounds
9	Miller (2001:351-362)	The study used the Delphi technique in order to develop indicators to measure the movement of the tourism product at a company/resort level towards a position of greater	Europe	1st round:54/74 2nd round:37	5 point (strongly disagree to strongly agree)	SD	2 round

		or lesser sustainability.					
10	Chang et al (2008:211-229)	Delphi was used to assess the importance or ERP life activities.	Asia (Taiwan)	1st round:27/40 2nd round:24	10-point for importance	SD	2 rounds
11	Nelms & Porter (1985:43-61)	This study estimates the maximum possible impact that technology could have on clerical productivity as well as the actual expected impact.	USA (Atlanta, Georgia)	10	n/d3	SD, IR, median	2 rounds

1. SD: standard deviation

2. IR: interquartile range

3. CV: coefficient variation

Source: Giannarou & Zervas (2014:69-72)

4.5. Study setting

The study was conducted at two (2) hot springs which are the Tshipise Tsha Sagole, Mphephu Resort, and in the Limpopo Province Department of Economic Development, Tourism and Environment.

4.6. Study population

According to (Polit and Beck, 2008:5) population is the totality of all subjects that confirm to a set of specifications, comprising the entire group of persons, that is of interest to the researcher and to whom the research results can be generated. Criteria for the selection of panelists were fundamentally based on background and experiences with regard to the target issue being investigated.

Capability to contribute helpful inputs (highly trained and competent within the specialised knowledge related to the target issue). Willingness to revise their initial or previous judgments for the purposes of reaching a consensus.

4.6.1. Target population

People who have been identified to be members of the panelists Include, top management decision makers who will utilize the outcomes of the Delphi Study, professional staff members, and respondents to the Delphi questionnaire whose judgments were sought.

4.7. Sampling method

Although consensus of what constitutes an optimal number of experts in Delphi study has not been reached among researchers (Ludwig, 1997:1-4) notes that the majority of Delphi studies have used between 15 and 20 respondents. For this study these is included:

From the public sector: panelists selected had a minimum of 5 years working experience in decision- making capacity in government-related tourism organisations. From the industry: panelists selected were currently employed in the tourism industry with a minimum of 5 years of work experience, and be a member of a tourism association.

Academic panelists: panelists selected had at least 5 years teaching experience in teaching tourism at a university. Inclusion criteria: chosen panelists had to be experts in the tourism industry relevant experience in the tourism environment.

Table 4.2. Panelists frame

Panelists	Work experience	Number of panel members
Public Sector (Department of Economic Development, Environment and Tourism)	5 years	6
Tourism Industry (Tshipise Tsha Sagole and Mphephu resort)	5 years	5 in Tshipise and 5 in Mphephu resort
Department of Tourism (University of Venda)	5 years	4 from University of Venda
Total number		20

Source: Study data (2016)

4.8. Data collection tool

According to Nibabe and Mgutshini (2014:28-30) and Burns and Groove (2009:68) “data collection is a systematic way of gathering information relevant to the research purpose or question”. The Delphi method is the approach adopted for data collection in this study. Theoretically, the Delphi process can be continuously iterated until a consensus is determined to have been achieved. However (Cyphert and Grant, 1971:272-273), (Brooks, 1979:377-385),(Ludwig, 1994:55) and (Custer, Scarcella and Stewart, 1999:1-10) pointed out that “three iterations are often sufficient to collect the needed information and to reach consensus in most cases”.

Round 1: In the first round, the Delphi process began with an open-ended questionnaire (annexure 2). The open-ended questionnaire served as a main foundation for soliciting specific information about the subject matter/issue from the Delphi panelists. After receiving panelists’ responses, the researcher converted the collected information into a likert type questionnaire. The questionnaire was used as the survey instrument for the second round of data collection. It is also acceptable in the Delphi process to use a structured questionnaire in Round 1 that is based on review of the literature. In this study, panelists were allowed to indicate whether proposed

determinants of hot spring destination are acceptable, should be deleted (annexure 3) or should be edited.

Round 2: In the second round, each Delphi participant received a second questionnaire and was asked to review the items summarised by the researcher based on the information provided in the first round. At this stage, Delphi panelists were required to rate (using Likert type scale) to establish preliminary priorities among items. As a result of round two areas of disagreement and agreement were identified Ludwig (1994:54-55). In this round, consensus began forming and the actual outcomes was presented among the participant's responses.In general, the number of Delphi iterations depended largely on the degree of consensus sought by the researcher and can vary from three to five (Ludwig, 1994:54-55).

4.9. Validity and Reliability of the data collection instrument

Validity and reliability are discussed below.

4.9.1. Validity

The validity of an instrument refers to the extent to which it measures what it is supposed to measure. For the purpose of this study, face validity and content validity was ensured. Face validity is a judgment of whether on the face of it, the research instrument appears to measure what it is supposed to measure while content validity is the term used to indicate how well the content appears to measure what it is supposed to measure (Clifford, 1997:34).

The questionnaire was submitted to experts in the department of economics, University of Venda for evaluation. The questionnaire was structured in English without translation because participants are experts in the tourism industry and have a good understanding of the English language.

4.9.2. Reliability

According to de Vos, (2001:423) reliability indicates the accuracy or precision of an instrument and refers in general to the extent to which independent administration of the same instrument (or highly similar instrument) consistently yields the same or similar results under comparable conditions. In the Delphi technique, the study and its results are reliable if other researchers using the same method obtained the same results.

4.10. Data Collection Process

Two sets of questionnaires were used to collect data for the study. Round one of questionnaire which was an open-ended set of questions(qualitative) and round two was a set of ranking order questions(quantitative) and was put together as an instrument or tool designed to explore specific research question. The questionnaire for this study was distributed to the panelists/experts by the researcher in both rounds. The researcher delivered, collected and made follow-ups in order to get a high response rate.

4.11. The Delphi Method on data analysis.

With respect to data analysis, decision rules must be established to assemble and organise the judgments and insights provided by Delphi respondents. Consensus is the operative word in Delphi study on a topic. Generally, consensus on an issue under investigation can be reached if a certain percentage of votes fall within a prescribed range. Green (1982:270-279) suggests that "at least 70 percent of Delphi respondents need to rate three or higher on a four point Likert-type scale and the median has to be 3.25 or higher". Yet others Scheibe, Skutsch & Schofer, (1975:262-287) opine that "the use of percentage measures is inadequate and suggest that a more reliable alternative is to measure the stability of panelists' responses in successive iterations".

The Delphi process can involve both qualitative and quantitative approaches. In Delphi studies that deal with open-ended questions to solicit respondent's opinions, qualitative method is used. Thereafter, subsequent iterations identified the desired level of consensus as well as changes of judgment among panelists. The major statistics used in Delphi studies were measures of central tendency (mean and median) as well as the level of dispersion (standard deviation and coefficient of variation) to present information about the collective judgments of respondents, the use of median score based on Likert-type scale is strongly favoured (Hill & Fowler,1973:179-192;Eckman, 1983:68;Jacobs,1996:45).

In this study, a variety of measures of central tendency and dispersion were computed and those best suited to reflect the resultant convergence of opinions were used in the analysis, and conclusions subsequently drawn based on them. The questionnaires were submitted to experts at the Department of Economics, University of Venda for evaluation.

4.12. Ethical considerations

This refers to the ethical principles that were used when tackling a particular issue (codes and rules which govern certain practices of a profession). Research ethics involves protecting the rights of respondents and institutions in which research is done and maintaining scientific integrity (Burns & Grove, 2009:36). Ethical principles relating to human subjects were maintained such as permission for data collection, right to refuse and informed consent (Nibabe and Mgutshini, 2014:28-30).

4.13. Permission to conduct the research

The following is the outline of how the researcher observed the ethical principles of research. The proposal was presented to the Higher Degree Committee (HDC) of the School of Management Sciences at the University of Venda for recommendation and ethical approval by the University Research and Ethics Committee. The ethical certificate was presented to the Department of Social Development (Limpopo Province), (Annexure 8.) in order to obtain permission to access the participants.

4.14. Informed consent

Consent forms were given to each participant to be completed. Each of the respondents was informed that their participation in the study is voluntary. The researcher ensured that only those participants who completed the consent form could participate in the study. The participants were informed of their right to withdraw from participation at any time should they wished to do so.

4.15. Confidentiality

Information provided by the participants were treated as confidential. Access to completed questionnaires was restricted to the researcher only. Participants were not coerced to put their names on the questionnaires and the respondents were left to answer the questionnaire in the absence of the researcher.

4.16. Summary

The current study tries to provide a simple methodology to assess tourism competitiveness based on a number of indicators. The Delphi method would allow the creation of a comprehensive set of indicators with which the competitiveness of hot spring activities in Limpopo can be assessed.

The Delphi method incorporates both qualitative and qualitative methods of data collection. The Delphi method developed in this study utilised two rounds of questionnaire, the round first being the qualitative, where respondents were given open ended questions and asked to list indicators that can contribute to tourism competitiveness at the hot spring destinations and the second round of questionnaire was quantitative method were respondents were asked to rank indicators on a likert scale.

5. PRESENTATION OF STUDY FINDINGS

5.1. Introduction

The study aimed at identifying indicators for measuring the competitiveness and sustainability of hot springs tourism in Limpopo Province. This chapter present (and interprets) the findings on the data collected through the Delphi approach. The Delphi method was used to elicit consensus opinions from experts using questionnaires in an iterative process known as rounds. Two rounds of questionnaires were administered in order for the expert panel to identify and reach consensus on the indicators that determine destination competitiveness and attractiveness.

5.2. Selection of panel members

Twenty (20) panelists were identified of which 12 were female and 8 were male and they comprised of four (4) academics who are currently lecturing tourism at the University of Venda, six (6) tourism practitioners in the Limpopo Department of Economic Development, Environment and Tourism (LEDET), five (5) tourism practitioners at Mphephu hot springs and five (5) members of the civic community at Tshipise Tsha Sagole hot spring. Although Tshipise is currently closed and members of the community are only doing the monitoring and no one is allowed to enter. Members of the community collect water for household use from the eye of the hot spring which is outside the fence. Target participants at Tshipise were civic members and retired resort employees who have experience or knowledge regarding hot spring tourism. Each round was allocated about two weeks for the purpose of collecting data.

Table 5.1. Selection of panel members

Organization		Frequency	Percent
Valid	Public	16	75.0
	Private	0	0.0
	Academic	4	20.0
	Total	20	100.0

Source: study data

Table 5.2. Occupation of panel members

Occupation		Frequency	Percent
Valid	Tourism manager	1	5.0
	Councilor	1	5.0
	Educator in charge of the Tshipisetshasagole	3	15.0
	Guest service assistant	3	15.0
	Hospitality manager	1	5.0
	Junior lecturer	4	20.0
	Principal	1	5.0
	Tourism officer	6	30.0
	Total	20	100.0

Source: study data

Table. 5.3. Gender of panel members

Gender		Frequency	Percent
Valid	Male	8	40.0
	Female	12	60.0
	Total	20	100.0

Source: study data

5.3. Round one

5.3.1. Purpose

The identification and compiling of the key Hot Spring Tourism development issues and indicators through an open-ended questionnaire survey on panel members.

5.3.2. Data collection

The survey was hand delivered and personally conducted by the researcher to all 20 panel members. The questionnaire asked the panelists to list as many major issues/indicators as possible, for development of hot spring site as a potential tourists' destination. Panelists were allowed to list the issues with explanations and their indicators in order to help the researcher's understanding**.** Analysis of responses to issues were categorised into broad factors as follows:

A Tourism destination resources and attractions

B Tourism Infrastructure both (social and physical)

C Tourism destination marketing strategies

D Determinants of the rates to charge at hot spring destinations

E Environmental management policies to be put in place in hot spring destinations

F Government support necessary for the development of hot springs

G Economic factors that increase visitation to hot springs

H Local community activities that complement the attractions to hot springs

The results of the first round of open- ended questions on the assessment of the potential of hot springs tourism in Limpopo Province were categorised and synthesised for use in the second round. The numbers on each column of panelists and row of every indicator represents the number of panel experts who identified that particular indicator.

The panel identified about 203 indicators that can contribute to hot spring destination competitiveness as shown in the table 5.4 below.

5.3.3. Findings from the first round

Table 5.4. Indicators of hot spring destination competitiveness from panel of experts. (1st round)

1. Specific attractions at hot spring destinations to encourage tourist to visit.	Panelists			
	Academic (4 members)	Ledet (6 members)	Tshipise (5 members)	Mphephu(5 members)
Issues identified.				
Swimming pools	3		2	
Cultural events	1			
Entertainment (music festival)	2	1		
Sports bar	2			5
Overnight accommodation	1	2	3	5
Horse ride		1		
Braai facilities	1		3	
Big five		1		
Crocodile park		1		
Guest house		1		
Restaurant		2	2	5
Spa		1		

Theme park	1		
Adventure sports	1		
Game drives	1		
Hiking trails	1		5
Fishing dam	1		
Bird watching	1		
Zip lines	1		
Free admission	1		
Clean environment	1		
Kids park(jumping castle, bumper and swing)	1		5
Conference hall	1	3	
Exhibitions		1	
Signage		1	
Tour guide officer		1	
Tennis and volley ball courts		2	
Dormitory		1	
Lapa		1	
Fence(for security purposes)		1	

2. Infrastructure (social, physical) to make hot spring attractive.	**Academic**	**Ledet**	**Tshipise**	**Mphephu**
Issues identified.				
Adequate and maintained roads	2	3		
Leisure activities	1	1		
Free Wi-Fi		1		
Accessibility to handicapped		1		
Visitors		1		
Spa		1		
Restaurant		1		
Electricity		1		
Transport facilities		1		
Human capital		1		
Signage (information sign and boards)		2		
Clean ablutions		1		5
Social media page (face book with directions)		3		
Good marketing		1		

Word of mouth		1		
Tower	1			
Public clinic	1			
Police station(satellite)	1			
Fire fighter station	1			
Post office	1			
Manmade waterfall				5
Manmade pot holes				5
Tennis courts			1	
Gymnasium			1	
Museum			1	
Library centre			1	
Fishing ponds			1	
Traditional village(e.g. Venda village)			1	
Protection on wild birds and animals			1	
Display on traditional food			1	
Cultural or traditional dance			1	
Fashion and arts exhibition			1	
Accommodation			2	

3. Strategies to market hot springs in Limpopo province.	Academic	Ledet	Tshipise	Mphephu
Issues identified.				
Media (television, radio and newspaper)	2	4	2	
Social media (Facebook, WhatsApp)	3	4		
Tour operators		1		
Through people experience		1		
Tourism publications		1		
Establish website		1		
Limpopo tourism development agency(website)		1		
Municipality website		1		
A play		1		
Word of mouth	2			
Brochures'	1		1	5
Flyers	1			
One advert with all hot springs	1			
Shot left	3			

Involve NGO			1	
Partnership between hot springs			3	
Signage			1	
Internet			3	
PRO for advertising			1	
Campaigning			1	
4x4 trails				5
Swimming pool competition				5
Hosting major events				5
Fun run marathon				5
Electronic marketing				5
Stokvel, clubs and churches				5
4. Factors that should determine the rates to charge on tourists at a hot springs.	**Academic**	**Ledet**	**Tshipise**	**Mphephu**
Issues identified.				
Target market		1		
Location (geographical area)	2	2	1	

Quality of service		2		
Infrastructure availability	2	1		
Popularity of the hot spring		2		
Accessibility to the hot springs		1		
Grading of accommodation	1			
Cleanliness of the hot spring	1			
Security of the hot springs			2	5
Demarcation of hot spring				5
Maintenance of hot spring				5
Future research studies			1	
Attractive surroundings(lawn, shade and trees)			2	
Availability and access to swimming pools			2	
Income levels of users and affordability to pay.			1	
5. Environmental management policies to be put in place to conserve and preserve hot springs.	**Academics**	**Ledet**	**Tshipise**	**Mphephu**

Issues identified.

Environmental management policy		1		
Environmental legislation		1		
Integrated management plan		1		
Educating people about the importance of hot springs		1		
No littering signage	2	2		2
Tourists must not touch or/and take anything within the spring	1	1		
Entry must be monitored		1		
Green paper on tourism policy		1		
Environmental impact assessment		1		
A period of rest on the spring to avoid environmental deterioration		1		
Land degradation, pollution, and sustainable tourism	1			
No bathing in hot spring				5
Prohibition of boreholes near the hot spring by government			1	
Plants near hot spring should not be disturbed			1	

Department of water affairs should fence the hot spring to prevent animals			1	
No washing clothes in the hot spring			1	
Collection of dirt and debris			2	
Cleaning of natural resource(hot spring)			2	
Development of natural resource			2	
Protection of natural resource			1	
Provision of refuse bags			1	
Prohibition of fire everywhere			1	
Responsible tourism	2			
6. Government support for the development of hot springs.	**Academics**	**Ledet**	**Tshipise**	**Mphephu**

Issues identified.

Basic services for development		1	
Create corporations to partner with business		1	
Skills to empower local communities			3
Budget allocation for infrastructure development		1	
Human resource		1	

Funding	3	3	3	
Marketing the hot springs internationally	1		1	
Conservation	1			
Signage	2			
Educating people about hot spring	1			
Road maintenance	2			5
Fencing				5
Parking area				5
Guest house				5
Research findings implementation			1	
Advisory services			1	
Pay tour guides			1	
Salary subsidy			2	
Auditing of financial resources			1	
7. Economic factors that can increase tourists (domestic and international) to hot springs.	**Academic**	**Ledet**	**Tshipise**	**Mphephu**

Issues identified.

Good marketing		1		
Culture and heritage		1		
Low inflation rate (low prices of basic food that leaves domestic tourists with disposable income to spend in hot springs spa)	4	2		5
Establishment of industries		1		
Land ownership		1		
Government policies		1		
Rates of exchange		1		
Affordability of entry		1		
Viability		1		
Transportation	2			
Affordable prices of petrol and food	2			
Attractions and accommodation	1			
Political stability				5
Less xenophobic attacks				5
Less crime				5
Less unemployment rate and over population			1	5
Creation of jobs			2	

Reducing unemployment			2	
Creation of sustainable economy			1	
Exposure to hot spring			1	
Selling of traditional food and vegetables			2	
Good security			1	
Availability of houses for accommodation			1	
Accessible roads			1	
Tower (network)			1	
Power lines to be built			1	
Affordability rates			1	
Availability of good physical facilities			1	
8. Local community activities that can complement the attractions to hot springs.	**Academic**	**Ledet**	**Tshipise**	**Mphephu**
Issues identified.				
Cultural activities(e.g.malende)	2			5
Annual celebrations(e.g.heritage)		1		
Story telling	1	2		5

Markets (selling cultural products)	1			
Stokvel		1		
School day trips		1		
Year-end functions		1		
Governments events		1		
Municipal events		1		
Music celebration		5		
Batho pele celebration		1		
Horse riding	1			
Artifacts	1			
Historical books(with pictures, healing powers)	2			5
Information about the chiefs (royal) of the specific place	1			
Donkey cart(transporting tourists around the village)				5
Homestead (prepare traditional food)				5
Traditional whisky				5
How to collect fire wood				5
Hosting local events			1	

Good roads	1
Expanded Public Works Program for cleaning	1
Community cleaning campaign	2
Community hall	1
Newspaper	1
Big screen	1
Cultural village	1
Local music entertainers	1

Source: study data (2016)

5.3.4.1. Specific attractions at hot spring destinations to attract tourists.

About thirty (30) indicators were identified. Although there are other indicators which were identified, but due to their rate of response from panelists they were regarded as having less impact. Indicators with the highest score were regarded as having an impact in the potential of hot spring tourism in the province. Indicators with the highest score were then collated and synthesised for the second round. For the first broad domain/area of specific attractions to attract tourists, 7 high ranked indicators were selected from the total of 30 identified as shown in Table 5.5.below from the total of 30 identified.

Table 5.5.Ranking of indicators identified as specific attractions to attract tourists to hot spring destinations.

Indicators identified	No of panelists
Availability of swimming pools	10
Sports bar	07
Overnight accommodation	11
Braai facilities	04
Restaurant	09
Hiking trails	06
Kids park and conference hall	06

Source: study data (2016)

Although other indicators such as braai facilities, hiking trails, Kids Park and conferencing did not score high points as far as ranking by panelists was concerned, but were included by the researcher because of their importance in determining competitiveness and attractiveness.

5.3.4.2. Infrastructure both social and physical that can make hot spring attractive and competitive.

For the second broad domain/area of infrastructure both social and physical that could make hot spring tourism attractive and competitive, three moderate ranked indicators and seven low ranked indicators were selected from the total of 33 identified as shown in Table 5.6 below. The indicators that panelists scored the lowest points on but were included by the researcher because of their importance in determining competitiveness and attractiveness in the hot spring are,

accommodation, police station nearby, public clinic nearby, signage, social media, free Wi-Fi and restaurant. According to March (2004:4) infrastructure relates to the extent and quality of facilities and processes necessary to attract and sustain visitation to a destination.

Table 5.6.Ranking of indicators identified for infrastructure both social and physical that could make hot spring attractive and competitive.

Indicators identified	No of panelists
Adequate and maintained roads	05
Clean ablutions	06
Accommodation	02
Police station nearby	01
Public clinic nearby	01
Manmade waterfalls	05
Signage	02
Social media (Facebook, whatsupp etc.)	03
Free Wi-Fi	01
Restaurant	01

Source: study data (2016)

5.3.4.3. Strategies to market hot springs in Limpopo.

For the third broad domain/area of strategies to market hot spring in Limpopo five high ranked, a three moderate rank and one with the low ranked indicators were selected from the total of twenty six identified as shown by the Table 5.7.below.The indicators that panelists scored the lowest points on but were included by the researcher because of their importance in determining competitiveness and attractiveness in the hot spring are, word of mouth, internet, signage and partnership between hot springs.

Table 5.7. Ranking of indicators identified as strategies that could be used to market hot springs.

Indicators identified	No of panelists

Media (TV, newspaper, radioetc.)	08
Social media (Facebook, Whatsuppetc.)	07
Word of mouth	02
Brochures and flyers	07
Stokvels clubs and churches	05
4x4 trails	05
Internet	03
Signage	03
Partnership between hot springs	03

Source: study data (2016)

5.3.4.4. Factors that determine the rates to charge at hot springs in Limpopo

For the fourth broad domain/area of factors that determine the rates to charge at hot springs in Limpopo two high ranked and four moderate rank indicators were selected from the total of fifteen identified as shown by the Table 5.8 below. The indicators that panelists scored the lowest points on but were included by the researcher because of their importance in determining competitiveness and attractiveness in the hot spring are, quality of service, infrastructure availability, attractive surroundings and availability and access to swimming pools.

Table 5.8.Ranking of indicators identified as factors that determine the rates to charge at hot springs in Limpopo.

Indicators identified	No of panelists
Location	05
Quality of service	02
Infrastructure availability	03
Maintenance of hot springs	05

Attractive surroundings	02
Availability and access to swimming pools	02

Source: study data (2016)

5.3.4.5. Environmental policies to be put in place to conserve and preserve hot springs

For the fifth broad domain/area of environmental policies to be put in place to conserve and preserve hot springs two high ranked and seven low ranked indicators were selected from the total of twenty three identified as shown by the Table 5.9 below. The indicators that panelists scored the lowest points on but were included by the researcher because of their importance in determining competitiveness and attractiveness in the hot spring are, tourists must not touch or take anything from the hot springs, entry must be monitored, prohibition of boreholes in hot springs, no washing clothes in hot springs, provision of refuse bags, prohibition of fire everywhere and responsible tourism.

Table 5.9.Ranking of indicators identified as environmental policies to be put in place to conserve and preserve hot springs.

Indicators identified	No of panelists
No littering signage	06
Tourists must not touch or take anything from the hot springs	01
Entry must be monitored	01
No bathing in hot springs	05
Prohibition of boreholes in hot springs	01
No washing clothes in hot springs	01
Provision of refuse bags	01
Prohibition of fire everywhere	01
Responsible tourism	02

Source: study data (2016)

5.3.4.6. Government support for the development of hot springs.

For the sixth broad domain/area of government support for the development for the development of hot springs two high ranked and four low ranked indicators were selected from the total of nineteen identified as shown by the Table 5.10 below. The indicators that panelists scored the lowest points on but were included by the researcher because of their importance in determining competitiveness and attractiveness in the hot spring are, skills to empower local communities, signage, salary subsidies for tour guides and research findings implementation.

Table 5.10.Ranking of indicators identified as government support for the development of hot springs.

Indicators identified	No of panelists
Funding	06
Skills to empower local communities	03
Signage	02
Road maintenance	07
Salary subsidies for tour guides	02
Research findings implementation	01

Source: study data (2016)

5.3.4.7. Economic factors that can increase tourists to hot springs

For the seventh broad domain/area of economic factors that could increase tourists to hot springs three high ranked and four low ranked indicators were selected from the total of twenty eight identified as shown by the Table 5.11 below. The indicators that panelists scored the lowest points on but were included by the researcher because of their importance in determining competitiveness and attractiveness in the hot spring are, availability of transport, affordable prices food, creation of jobs and reducing unemployment.

Table 5.11.Ranking of indicators identified as economic factors that could increase tourists to hot springs

Indicators identified	No of panelists
Low inflation rate	11
Availability of transport	02
Affordable prices of food	02
Political stability	05
Less crime	05
Creation of jobs	02
Reducing unemployment	02

Source: study data (2016)

5.3.4.8. Local community activities that can complement the attractions in the hot springs.

For the eighth broad domain/area of economic factors that could increase tourists to hot springs five high ranked and one low ranked indicator were selected from the total of twenty eight identified as shown by the Table 5.12 below. The indicators that panelists scored the lowest points on but was included by the researcher because of its importance in determining competitiveness and attractiveness in the hot spring is, community cleaning campaign.

Table 5.12.Ranking of indicators identified as local community activities that could complement the attractions in the hot springs.

Indicators identified	No of panelists
Cultural activities	07
Story telling	08
Music celebration	05
Historical books	07
Healing powers	07
Community cleaning campaign	02

Source: study data (2016)

5.3.4.9. Summary of round 1.

Some indicators were identified by few a respondents from the first round, therefore the second round feedback is considered necessary in order to conclude on their importance. For this reason, a questionnaire of a controlled feedback of the group's perspective was designed for the second round so that the respondents could change their views on low and moderate ranked indicators during the first round. As opined by Altschuld (2003:98) the iteration characteristics of the Delphi technique can potentially enable investigators to mould opinion. An experiment, conducted by Scheibe, Skutsch and Schofer (1975:262-287) indicated that Delphi subjects may rate their responses differently after receiving feedback. However Cyphert and Grant (1971:272-273) concluded that "the Delphi technique could be used to mold opinion as well as to collect data. Indeed, subtle pressure to conform to group ratings is regarded as one of the major drawbacks in the Delphi investigations".

5.4. Round two

5.4.1. Purpose

In classical Delphi studies, consensus measurement has primarily been based on descriptive statistics. According to von der Gracht (2012:1525-1536) many "Delphi studies have stopped the survey procedure when a pre-defined level of agreement/consensus was achieved". The main purpose of the second round was to allow the expert panel to revise their opinions if they did not reach consensus during the first round

5.4.2. Data collection

The questionnaire in round 2 consisted of hot spring development indicator statements to which the respondents gave their opinions according to a five-point Likert scale, where 1 equaled strongly disagree, 2 disagree, 3 uncertain, 4 agree, and 5 strongly agree. The use of the Likert scale approach allows the researcher to compute a statistical measure of consensus.

Twenty panel members participated in this round and 20/20questionnaires (100%) were returned.

5.4.3. Level of consensus.

The level of consensus reached after each round determines the need for another round in the Delphi research approach. Literature surveyed on the approach indicated that in most Delphi

survey applications it is found that two to three iterations of the rounds of the Delphi survey data collection are enough to reach a consensus among the panel of experts (Kalaian and Shah, 2006:226-232).

To determine the level of consensus or level of agreement among respondents, a number of statistical measures of central tendency were computed from the responses obtained in the round 2 of the Delphi survey. These measures of consensus and the associated criteria for determining identified in the literature, and which have been applied in this study are as follows:

Table 5.13.Decision criteria used in determining level of consensus.

Measure of consensus	Decision rule for determining consensus
1.Coefficient of variation	0≤ V≤ 0.5 Good degree of consensus, no additional round
	0.5< V≤ 0.8 Less than satisfactory consensus, need for another round
	0.8≤ V Poor degree of consensus, need for additional round
2.Standard deviation	0≤ x ≤ 1 High level of consensus
	1.01≤ x ≤ 1.49 Reasonable/ fair level of consensus
	1.5≤ x ≤ 2 Low level of consensus
	2≤ x No consensus
3.Mean/Median ranking	3.0 to 4.9 high level of consensus ,no need for more rounds

Source: von der Gracht (2012:1526-1536)

5.4.4. Analysis of panel member rating (descriptive statistics).

The data from the second round of the Delphi survey was analyzed using SPSS version 23. The results of the various measures of consensus computed for the eight broad factors of hot spring destination potential and their associated indicators are presented in Tables 5.14 to 5.21.

Table 5.14. Broad factor: Specific attractions at hot spring destinations to encourage tourists to visit.

Factor Indicators	Mean	S Dev.	C.V
Beautiful and clean natural scenery	4.500	0.607	0.135
Entertainment held at regular basis(music festival)	4.100	1.021	0.249
Availability and accessibility of swimming pools	4.350	0.813	0.187
Availability of sports bar and restaurant	3.950	1.191	0.302
Braai facilities	4.450	0.759	0.171
Kids park (jumping castle, swing and bumper)	4.200	1.005	0.239
Full time tour guide officer	4.150	1.226	0.295
Adventure sports	3.750	1.118	0.298
Notable historical land mark nearby	4.050	1.050	0.259
Comfortable climate	4.350	0.745	0.171

SDev. Standard Deviation

C.V. Coefficient of Variation

Source: Researcher's own compilation from SPSS output.

From Table 5.14. above, the mean ranging from 3.75 to 4.5 indicates a high level of agreement or consensus among respondents on the average of a five point likert scale of consensus with respect to indicators of specific attractions at hot spring destination to encourage tourists to visit,

and the standard deviation values ranging from 0.607 to1.226 indicates that there is high level of consensus among panel members. Also the panel rating was further tested using coefficient of variation which has a decision rule for high and reasonable consensus among panel member of or below 0.5. The result from Table 5.14 showed that all the panel members rating are well below 0.5 with CV values ranging from 0.135 to 0.302 which is a good proof that there was firm consensus among panelist on the factor indicator having no need for additional rounds.

According to Dupeyras and MacCullum (2013:8) and Balan, Balaure, and Veghes (2009:2) to be competitive in the global tourism market place, a destination has to maintain and develop its attractiveness and distinctiveness. They further suggested that to monitor the competitiveness of a destination it is appropriate to introduce a group of indicators dealing with the notion of attractiveness. Indicators such as beautiful and clean scenery, availability of swimming pools, comfortable climate and braai facilities leads to the creation of employment opportunities that could possibly contribute to the growth of the hot springs tourism sector.

Table 5.15. Broad factor: Infrastructure (social, physical) to make hot springs attractive.

Factor indicators	Mean	S Dev.	C.V
Adequate and maintained roads	4.450	0.826	0.186
Leisure activities	4.400	0.821	0.187
Free Wi-Fi	4.150	1.461	0.352
Accessibility of hot spring to handicapped	4.150	1.268	0.306
Clean ablutions	4.350	1.182	0.272
Social media	4.050	1.146	0.283
Overnight accommodation	4.700	0.470	0.100
Adventure sports	4.400	0.940	0.214
Signage	3.600	0.821	0.228
Police station	4.050	1.276	0.315
Tower	3.950	1.317	0.333

Source: Researcher's own compilation from SPPS output.

From Table 5.15 above, the mean ranging from 3.6 to 4.45 indicates a high level of agreement or consensus among respondents on the average of a five point likert scale of consensus with respect to indicators of **Infrastructure (social, physical) to make hot springs attractive**, and

the standard deviation values ranging from 0.47 to 1.46indicates high consensus among panel members. Also the panel rating was further tested using a coefficient of variation which has a decision rule for high and reasonable consensus among panel member of or below 0.5. The result from Table 5.15 shows that all the panel members' ratings are well below 0.5 with CV values ranging from 0.10 to 0.35 which is a good proof that there was a firm consensus among panelist on the factor indicator having no need for additional rounds.

These results are in agreement with March(2004:4)"who maintained that the extent and quality of infrastructure facilities and processes must be as such to attract and sustain visitation to a destination", and also Holloway(1998:45) who said that "infrastructure included amenities and facilities to cater for the tourists, which includes accommodation and food, local transport, information centers and the necessary infrastructure to support tourism consisting of roads, public utility services and parking facilities. He further added that in some case amenities themselves may be the attraction and these include resort hotels which offer a comprehensive range of in-house attractions".

Table 5.16. Broad factor: Strategies to market hot springs in Limpopo Province

Factor indicators	Mean	S Dev.	C.V
Media (newspaper, radio.)	4.650	0.671	0.144
Social media(WhatsApp, Facebook)	4.650	0.671	0.144
Internet	4.400	1.142	0.260
Establishing a brand name for hot spring in Limpopo Province	4.150	1.137	0.274
Word of mouth	4.200	1.056	0.252
Brochures and flyers	4.150	0.933	0.225
Partnership between hot springs in the province	4.400	0.883	0.201
Hosting sports events	3.900	1.447	0.371

Source: Researcher's own compilation from SPSS output.

From Table 5.16 above, the mean range from 3.90 to4.65 indicates a high level of agreement or consensus among respondents on the average of a five point likert scale of consensus with respect to indicators measuring **strategies to market hot springs in Limpopo Province** and

the standard deviation values ranging from 0.67 to 1.44indicates high consensus among the expert panel.

Also the panel rating was further tested using a coefficient of variation which has a decision rule for high and reasonable consensus among panel member of or below 0.5. The result from the Table showed that all the panel members rating are well below 0.5 with CV values ranging from 0.14 to 0.37 which is a good proof that there was a firm consensus among panelist on the factor indicator having no need for additional rounds. With respect to the indicators on strategies to market hot springs in Limpopo, Pine and Gilmore(1998:97-105) argued that “more and more marketers are moving away from traditional feature and benefits marketing toward creating experience for their consumers. They further argued that consumers are both rationally and emotionality driven. The results from the panelists indicate the use of brochures and social media can be the best way to market hot springs in Limpopo”.

The finding further agree with Pine and Gilmore(1998:97-105)that successful experiences are those that consumers find unique, memorable, and sustainable overtime, would want to repeat build upon, and enthusiastically promote via word-of-mouth. Our findings were in support of Hull, Michael, Walker, and Roggenbuck (1996:299-314)on the important role of leisure experience who noted that experience is an important part of what recreationists say they want, and what recreation resource managers try to provide.

Our study support the findings by Bojanic (2007:32-39) when he opined that “marketing efforts help enhance the appeal of particular attractions, whereas managerial activities are likely to strengthen the competitive position of a destination price”, which links with Crouch and Ritchie (2003:67) and the Dwyer et al. (2004:91-101) models as a qualifying determinant that is translated for the present study as a hot spring tourism destination strategy.

Morgan, Robert, Shelby and Hunt (2003:20) suggested that “collective promotion of an area through a pooling of efforts to achieve economies of scale helps advance the field of hot spring destination marketing and bring about efficient use of tourism resources and effective marketing practices. Therefore, this was realized through the promotion of Taiwan’s hot spring calls for cross-marketing programs of the destination tourism products and private sector-public sector co-operative marketing alliances”.

The aim of destination branding is to convince the largest possible number of people that the destination is suited to their needs: In support to this study d`Hausteserre (2000:23-32) saw branding as acritical tool to the creation of destination branding and the identification of the core

values of the destination as a critical tool to the translation of these into a suitably emotionally appealing name or label.

The results of this study are in support of the study by Samantha Foster, Spa business trends in Asia, Spa finder Wellness (2014:2) who concluded that “China’s strategic marketing is the key to any spa’s or hot spring’s success and this is evident through China’s main marketing strategy which uses a unique selling proposition (USP) to entice foreign spa lovers to China. They added that to market a destination such as hot spring one must find a market which will appreciate most the value of what hot spring offer. The Chinese hot spring market has developed its unique selling positions to define the core essence of what the business is all about in order to effectively communicate its advantages to the most profitable market opportunities currently available”.

Table 5.17.Broad factor: Factors that determine the rates to charge on tourist at hot springs.

Factor indicators	Mean	S Dev.	C.V
Location	4.300	0.801	0.186
Popularity of hot springs	4.450	0.826	0.186
Infrastructure availability	4.350	0.933	0.215
Safety and security	4.450	0.686	0.154
Maintenance of hot springs	4.450	0.999	0.224
Attractive surroundings	4.500	0.827	0.184
Availability of swimming pools	4.500	0.827	0.184

Source: Researcher’s own compilation from SPSS output.

From Table 5.17 above, the mean range from 4.3 to 4.5 indicates a high level of agreement or consensus among respondents on the average of a five point likert scale of consensus with respect to indicators measuring factors **that determine the rates to charge on tourist at hot springs**. The standard deviation values ranging from 0.80 to 0.99indicates good consensus among the panel members.

Also the panel rating was further tested using coefficient of variation which has a decision rule for high and reasonable consensus among panel member of or below 0.5. The result from the Table showed that all the panel members rating are well below 0.5 with CV values ranging from 0.154 to 0.224 which is a good proof that there was a firm consensus among panelist on the factor indicator having no need for additional rounds.

These findings find resonance with Cernat and Gourdon (2007:27) who emphasized that price competitiveness is one of the factors on which rates should be based. They further said that attractiveness could also depend on how well qualified the population is and on the general security situation of the country. Brown (1992:34) concluded that “fee prices should be based on visitor demand for access. And he further emphasized that, prices at hot spring are demand inelastic and to improve revenue, always increase price, never decrease. In this study, popularity (demand) for hot spring was found to be a major factor for pricing hot spring destination with the mean ranking of 4.450 that indicate the highest level of consensus among the panel members”.

Monroe and Chapman(2009:193) developed a model of the relationship among quality, value, price utilizing the concept of perceived value, and their study indicated that willingness to buy is positively related to perceived value, that is, the greater the perception of value, the greater the like hood the consumer will be interested in purchasing the product .The study of consumer loyalty perceived value by Monroe and Chapman(2009:60)was supported by the findings of the study which indicated that safety and security is the best predictor for repurchase intentions and in some location and infrastructure availability have played an important role in the hot spring consumer behavior as well as the purchase decision-making. Hence, it might be concluded, from what has been indicated based on a number of research reviews that guests have positive value from hot spring service performance, and they are likely to be loyal tourists and are willing to revisit.

Meidan (2013:27) assumed that “destination price is primarily dominated by the prevailing industry cost price and the nature of competition amongst rivalries which affects rates of profitability, and the acceptable level of sacrifice a consumer is prepared to make in order to receive the benefits of the tourism experience”. Goodall (1991:90) believed that “in order to retain the price competitiveness of the tourism industry, a wide range of pricing techniques are applicable: premium prices which are above the general market level to convey a superior product; middle range prices with emphasis on fair and good value for money; or cheap prices which attempt to lead the field”. Murphy (2000:87) high-lighted that “the value for money is what guides the choice of most tourists” and Goodall (1991:90) concluded that “if Taiwan’s hot springs are to stand out in the Asian-Pacific region, pricing plays an important role in not only regulating demand and raising revenue for hot springs enterprises, but also in conveying to tourists something about the quality of the hot springs experience”. Dwyer et al.(2000:43) suggested that “higher income countries tend to have higher prices, and lower income countries lower prices like in Taiwan with considerably more price competitive than Japan, but less competitive than Thailand and Malaysia and in order to maintain the price competitiveness of the hot springs

tourism sector, special attention must be paid to controlling the cost structure of tourism products and services; monitoring the price levels of those competing destinations; and ensuring value for money destination experiences".

Table 5.18. Broad Factor: Environmental management policies to be put in place to conserve and preserve hot springs.

Factor indicators	Mean	S Dev.	C.V
No littering signage	4.700	0.571	0.122
Tourists must not touch or take anything from hot springs	4.350	1.040	0.239
Entry must be monitored	4.500	0.688	0.153
No bathing in hot springs	4.250	1.118	0.263
Prohibition of boreholes near hot springs	4.150	1.226	0.295
No washing clothes inside the hot springs	4.300	1.380	0.321
Provision of refuse bags	4.450	0.887	0.199
Prohibition of fire everywhere	4.250	0.716	0.169
Responsible tourism	4.550	0.759	0.167

Source: Researcher's own compilation from SPSS output.

From Table 5.18. above, the mean range from 4.15 to 4.70indicates a high level of agreement or consensus among respondents on the average of a five point likert scale of consensus with respect to indicators of **environmental management policies to be put in place to conserve and preserve hot springs.** The standard deviation values ranging from 0.57 to 1.38 indicates high consensus among the expert panel.

Also the panel rating was further tested using a coefficient of variation which has a decision rule for high and reasonable consensus among panel member of or below 0.5. The result from the Table showed that all the panel members rating are well below 0.5 with CV values ranging from 0.12 to 0.32 which is a good proof that there was a firm consensus among panelist on the factor indicator having no need for additional rounds.

Our study support the findings by Mihalic (2000:65-78) and Emerton(2014:1-10) who suggested that "destination environmental management should be carried out with the establishment of environmental codes of conduct, self-developed environmental practice, certified or awarded best

practice, and accreditation schemes of which amongst them are environmental accreditation schemes which are found to be more effective because they provide specified criteria for environmental management and well-known marketing logo". Our study findings further supports Hassan(2000:239-240), and Stabler (1997:43) who believed that "tourism destination competitiveness is determined by the extent to which it is concerned with sustainability, contending that self-regulation actions of the hot spring tourism industry and a compulsory set of public policy measures are managerial efforts which minimize the environmental impacts and manage environmental quality".

Moreover, competition creates an environment for improvement, innovation, quality, efficiency and effectiveness and according to Porter (1990:45) and on the other hand Hitt, Ireland and Hoskisson (2003:203) held that "co-operation increase the extent to which relevant enterprises work together towards a shared objective", Ritchie and Crouch (2003:167) added that "consumers are no longer a homogeneous group of people with identical motivations striving to travel, instead they are becoming more heterogeneous and sophisticated, and affect the competitive actions of tourism entrepreneurs and the functioning of the tourism destination as a whole". Likewise Porter (1990:47) said that "more sophisticated and more demanding customers are at the root of competitiveness, because they pressure hot spring destinations to achieve high standards in terms of product quality, features and service". The size, pattern of demand for tourism products and services at hot spring destinations and growth can reinforce competitiveness by affecting investment behavior, timing and motivation of which without proper environmental policies these cannot be achieved. Porter (1990:47) suggested that "demand conditions, particularly domestic demand and its internationalization to foreign markets provide a basis for developing a nation's hot spring tourism industry".

In a similar fashion Norris (1995:1-3), and Diedrich (2007:985-996) maintained that "tourism particularly hot spring tourism, is seen as one way of conserving the natural environment and at the same time providing an income to those who own the land and live in the vicinity of the resource, i.e. eco-tourism. However, they opined that conservation communities are divided on this subject of ecotourism. The skeptics of ecotourism see the natural environments and the local communities being overrun by hordes of people and the 'eco' prefix little more than a marketing device ,green flag in which to wrap one more kind of exploitation with the profits mainly going to the wealthy entrepreneur, while the local communities remain as poor as before".

Table 5.19. Broad factor: Government assistance for the development of hot springs in Limpopo province

Factor indicators	Mean	S Dev.	C.V
Funding	4.250	1.118	0.263
Skills to empower local community	4.300	1.218	0.283
Educating local people about the importance of hot springs	4.300	1.129	0.262
Research findings implementation	4.300	0.979	0.228
Salary subsidy for tour guides	4.350	0.933	0.215
Advisory services	4.200	0.768	0.183
Parking area	4.450	0.686	0.154
Road maintenance	4.550	0.759	0.167
Fencing	4.650	0.587	0.126
Developing the hot springs	4.250	0.639	0.150
Marketing the hot springs	4.550	0.605	0.133

Source: Researcher's own compilation from SPSS output.

From Table 5.19 above, the mean range from 4.20 to 4.65 indicates a high level of agreement or consensus among respondents on the average of a five point likert scale of consensus with respect to indicators of **Government assistance for the support of hot springs in Limpopo Province**. The standard deviation values ranging from 0.587 to 1.29indicates high consensus among the expert panel.

Also the panel rating was further tested using coefficient of variation which has a decision rule for high and reasonable consensus among panel member of or below 0.5. The result from the Table showed that all the panel members rating are well below 0.5 with CV values ranging from 0.126 to 0.283 which is a good proof that there was a firm consensus among panelist on the factor indicator having no need for additional rounds.

In solidarity with the findings Ryan(1991:34) is of the opinion that "hot spring tourism may also bring a greater awareness of environmental legislation to an area or encourage governments to introduce new legislation to improve pollution prevention in hot springs ".Environmental pollution

is as much aesthetic as physical, said Holloway (1998:46) and he said that there is a need by government to protect the scenic beauty of the areas which attract tourists and not allow the natural landscape to be lost to tourist development.

Table 5.20. Broad factor: Economic factors that increase tourists to hot springs.

Factor indicators	Mean	S Dev.	C.V
Availability of transportation	4.400	0.681	0.155
Affordable prices	4.550	0.605	0.133
Attractions and accommodation	4.650	0.587	0.126
Political stability	3.700	0.865	0.234
Less xenophobic attacks	4.000	0.918	0.229
Less crimes	4.250	0.550	0.129
Creation of jobs	4.500	0.688	0.153
Adequate roads	4.450	0.759	0.171
Availability of tower	4.300	0.865	0.201

Source: Researcher's own compilation from SPSS output.

From Table 5.20 above, the mean range from 3.70 to 4.65 indicates a high level of agreement or consensus among respondents on the average of a five point likert scale of consensus with respect to indicators of **economic factors that increase tourists to hot springs**. The standard deviation values ranging from 0.550 to 0.918 indicates high consensus among the panel of experts.

Also the panel rating was further tested using coefficient of variation which has a decision rule for high and reasonable consensus among panel member of or below 0.5. The result from the Table showed that all the panel members rating are well below 0.5 with CV values ranging from 0.126 to 0.234 which is a good proof that there was a firm consensus among panelist on the factor indicator having no need for additional rounds.

These findings are in agreement with Smith (1995:35)who indicated that hot spring tourism is an important generator of employment in the economy and Archer (1984:517-518)said that "a given level of revenue or capital investment creates many more jobs in tourism, and the economy of the region in particular, than the same level of revenue or investment would in agriculture, or automobile manufacturing or petrochemicals(Multiplier effect).Additionally, hot spring tourism can stimulate other economic sectors in a country such as agriculture, manufacturing, construction,

and the service industry". Furthermore Holloway (1998:45) viewed the multiplier as a phenomenon which affects income in a region thereby increasing employment in that hot spring destination development gives rise to jobs in shops, schools and hospitals to local people.

Table 5.21. Broad factor: Local community activities that complement attraction to hot springs

Factor indicators	Mean	S Dev.	C.V
Cultural activities	4.350	0.813	0.187
Annual celebration	4.350	0.671	0.154
Story telling	3.900	1.021	0.262
Music celebration	4.150	0.875	0.211
Historical books	4.000	1.076	0.269
Community cleaning campaign	4.200	0.768	0.183

Source: Researcher's own compilation from SPSS output.

From Table 5.21.above the mean range from 3.90 to 4.35indicates a high level of agreement or consensus among respondents on the average of a five point likert scale of consensus with respect to indicators of **local community activities that complement attraction to hot springs**. The standard deviation values ranging from 0.671 to 1.076 indicates high consensus among the panel of expert. Also the panel rating was further tested using coefficient of variation which has a decision rule for high and reasonable consensus among panel member of or below 0.5. The result from the Table showed that all the panel members rating are well below 0.5 with CV values ranging from 0.154 to 0.269 which is a good proof that there was a firm consensus among panelist on the factor indicator having no need for additional rounds.

The response to this question from the expert panel is in line with Dupeyras and MacCullum (2013:34) who stated that "cultural and creative resources are important elements of the tourism product and key drivers of attractiveness for a destination, they further said that destinations that are able to offer travelers access to unique experiences through local culture and the creative economy have a competitive advantage. Culture and creativity in various forms can create significant competitive advantages that support long term sustainable tourism growth and spin off benefits to attractions".

These findings by Murphy (1988:56); Sheldon and Abenoja (2001:435-443); and Gutierrez(2001:37) contend that "there must be community-wide participation and continual

assessment of resident perceptions with a view to ensuring that tourism destination development remains consistent with local character and values".

5.5. Conclusions

The previous sections have presented the results of an extensive analysis of consensus measurement in the second and last round of Delphi studies including accompanying tests for significance. Consensus have been established among the experts respondents in the study about the indicators deemed important to promote competitive hot spring tourism in Limpopo.

These findings of the study may suggest that although increasing local tourism to hot spring through cultural activities and annual celebrations would be more profitable for a country's economy, the demand for tourism from abroad does not replace the domestic demand for tourism. This was consistent with Porter (1990:47) who noted that "domestic demand is more important than foreign demand because proximity makes it easier and faster to observe and understand immediate consumer needs and preferences". The results from the study further showed that the competitiveness of the hot springs tourism sector depends, at least partly, on local community support for tourism development or redevelopment, as the area's residents have to cope with a range of social, economic and environmental impacts from tourism activities.

6. Summary, Recommendations, Limitations and Conclusions.

6.1. Introduction

This chapter presents the summary, conclusions, recommendations and limitations of the study.

6.2. Summary

The study sought to investigate the potential of hot spring tourism destination competitiveness in Limpopo Province.

According to Kent (1968:143-164)“South Africa has plenty of hot springs, of which twenty exist in the northern part of Limpopo alone; another 11 in the Western Cape, 20 of the country’s springs have been converted into hot spring resorts, and three of these, Bela-Bela, Badplaas and Caledon-offer sophisticated health and wellness treatment facilities”.

The study provided an overview of destination resources and attractions available in hot spring and identified indicators that can be used to determine the competitiveness and sustainability of hot spring tourism in the Limpopo Province. Various sector-specific determinants of destination competitiveness identified in the analytical framework for the study have been generated from the models proposed by Crouch and Ritchie (2003:2) and Dwyer and Kim (2003:369-414).

This study has applied the Delphi technique which is designed as a group communication process and aims to achieve a convergence of opinion on a specific real world issue. The study further attempts to analyse the stakeholders perception on the sustainability of hot spring tourism in selected sites using the Delphi technique, and make recommendations to assist the local government of Limpopo Province and the tourism industry to improve hot spring destinations competitiveness.

The present study has adopted a model of destination competitiveness from King and Lee (2009:243-257) and hope that future studies should undertake to validate the applicability of this framework.

6.3. Conclusions

The Delphi technique has been used to elicit the opinions of a panel of experts from government, industry and academia. The expert panel reached consensus on all pre-selected determinants of destination competitiveness and assigned a level of importance to each.

It is concluded from the study- findings that a destination with an abundance of core resources and attractors, but lacks adequate supporting factors and resources, may find it very difficult to develop its tourism industry. Hot spring tourism industry in Limpopo has a great deal of untapped potential to enable it to become more attractive and competitive. It is further established from the study-findings that infrastructure, both social and physical, is necessary in order to make hot springs attractive.

With regard to marketing strategies in hot springs the study concluded that creative marketing must be used to attract new money into the Limpopo Province and rural communities where most of these hot spring are situated. It was further concluded that the province must tap into this market with creative marketing strategies without being afraid of exhibiting the province because what may seem common to the locals may become an international attraction to others.

From the study-findings regarding factors that determine the rates to charge tourist at hot springs destinations, it is concluded that pricing is the key element of attractiveness in each hot spring is unique and within different geographical areas.

It is concluded that for hot spring tourism to be a sustainable there must be adequate environmental management. This means that where ecologies are fragile, numbers and activities must be tightly controlled, pollution must be prevented and local cultures protected so that numerous untapped opportunities in hot springs can be realised.

With respect to government assistance for the support of hot springs in Limpopo it is concluded that hot springs must be funded and environmental policies must be put in place.

Furthermore it was concluded that since in Limpopo Province, the Vhembe district in particular, where there are fewer manufacturing jobs, hot spring tourism will offer an alternative advantage through the creation of jobs. Unlike manufacturing jobs, visits to a specific locale cannot be shipped offshore and that tourism is not finite like primary resources, such as petroleum or minerals. It is further concluded that the tourism industry will be an essential method to reinvigorate local economies.

It is concluded that local community activities such as annual celebrations and music festivals can complement hot spring tourism in Limpopo and will bring money into the local economy, thereby benefitting these communities.

The bottom line is that hot spring tourism is an export commodity that can also become an economic and educational development tool bringing wealth to the local economy while protecting its cultural ecology.

6.4. Recommendations

Based on the findings of the study the following recommendations are made.

With respect to specific attractions at hot spring destinations to encourage tourists to visit, it is recommended that there must be partnerships between the private sector and public sector in order to attract tourists to a hot spring destination, such as the provision of braai facilities, because private sector hot spring tourism provides most of the services to attract visitors such as attractive and beautiful scenery while the public have fewer attractions and activities that are put in place to attract visitors although partnerships between hot springs and government is visible in infrastructure, such as roads.

The Minister of Tourism in South Africa, Hanekom (Tourism Seminar on 4th August 2015) drew attention when he said that “tourism competitiveness can be achieved through, among others, destination improvement and product improvement. He further said that barriers such as visa dispensation on international visitors must be removed and conservation of the highest order (cleanliness of our destination) must be maintained”.

With regards to infrastructure (social, physical) to make hot springs attractive, it is strongly recommended that hot spring destinations must have human resources skills development such as in-service training for tour guides and tour operators. The study also suggests that traveler mobility such as accessibility of swimming pools to physically challenged tourists, adequate transport and availability of Wi-Fi hot spot is important and therefore plays an important role in defining the competitiveness of a destination.

With respect to strategies to market hot springs in the Limpopo Province, it is proposed that the Province must vigorously promote and brand hot spring tourism destinations in an effort to create a tourism identity, such as in the Western Cape for its beautiful Table Mountain and comfortable climate, and KwaZulu-Natal for its beautiful beaches and uShaka marina, that can be

a vital tool which can catch the attention of tourists both domestic and international. The study further suggested that the Limpopo Province can be a powerful brand on its own as a hot spring destination province such as Western Cape and KwaZulu –Natal which are powerful tourism brands in their own right.

With regards to factors that determine the rates to charge on tourist at hot springs, the study recommended that entrance fees and prices of associated products or services in hot spring destinations should be based on the level of provision of adequate safety and security since it is the key element of attractiveness identified by the study.

With respect to environmental management policies to be put in place to conserve and preserve hot springs, the study proposes that the National Department of Tourism should also advocate for local government to adopt policies and offer incentives that reward hot spring destinations that can demonstrate they have explicit policies and practices to expand economic opportunity in their local communities where they operate (Ashley et al, 2007:22).An example of such commitment is found in Arkansas in the USA where hot spring sites demonstrated the commitment to nature and the environment by incorporating parking gardens, rain gardens and other visually appealing techniques to manage water and pollution into all new developments and redevelopments.(Kaltenborn, Nyahongo, and Kidenghesho,2011:132-148).

With regard to government assistance for the support of hot springs in the Limpopo Province, the study recommends that both political leaders and community members must shape political attitudes towards the contribution that hot spring tourism might make in helping to stimulate economic and social development and the resultant quality of life at the destination.This resonates with Crouch (2007:20) who argued that “political will can support or hinder destination competitiveness”.

With respect to economic factors that increase tourism to hot springs the study recommends that hot spring destinations must be equipped with adequate infrastructure and attract tourists through affordable prices because tourism’s value to the Limpopo’s economy is of vital importance.

With regards to local community activities that complement the attraction to hot springs the study recommends that special events such as annual celebrations, music festival and sports events be held on a regular basis, as this can create high levels of interest and involvement which can serve as a cornerstone of hot springs competitive strategy. Moreover entertainment such as a comedy festival industry can be a major supplier to the hot spring tourism sector. It is further

recommended that communities interested in the economic success, such as job creation and increase in local GDP should recommend public improvements of projects surrounding the hot spring.

6.5. Limitations to the study

A major limitations to the study was the refusal to participate in the data collection from Bela-Bela hot springs which is one of the successful and well developed hot springs in the province and which attracts both domestic and international tourists, Furthermore due to the budget limitation the study could not cover other hot springs in other provinces such as Baadplaas in Mpumalanga province and Natal spa in Kwazulu-Natal.

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ANNEXURE 1.

List of Participants

Participant Number	Gender	Occupation	Place
1	Female	Junior Lecturer	University of Venda
2	Female	Junior Lecturer	University of Venda
3	Female	Junior Lecturer	University of Venda
4	Male	Junior Lecturer	University of Venda
5	Female	Hospitality Manager	Mphephu Resort
6	Male	Guest Service Assistant	Mphephu Resort
7	Male	Guest Service Assistant	Mphephu Resort
8	Female	Guest Service Assistant	Mphephu Resort
9	Male	Tourism Manager	Mphephu Resort
10	Female	Tourism Officer	LEDET
11	Female	Tourism Officer	LEDET
12	Female	Tourism Officer	LEDET
13	Female	Tourism Officer	LEDET
14	Male	Tourism Officer	LEDET
15	Male	Tourism Officer	LEDET
16	Male	Principal in charge of the hot spring	Tshipisetshasagole

17	Female	Councilor and Civic member	Tshipisetshasagole
18	Male	Educator in charge of the hot spring	Tshipisetshasagole
19	Male	Educator in charge of the hot spring	Tshipisetshasagole
20	Male	Educator in charge of the hot spring	Tshipisetshasagole

ANNEXURE 2.

Questionnaire

Could you please answer the following questions included in the first round survey sent to the panel of experts by listing the indicators that can lead to competitiveness and attractiveness in hot spring in the appropriate space provided? This should only take 15 to 20 minutes of your time. If you could fill out this form and return it to me as soon as possible it will be greatly appreciated. Please be assured that your responses will be held in confidence.

NOTE: Please indicate the correct alternative by ticking the appropriate box

Government related tourism organisation (public) ☐

Tourism industry privately owned (private) ☐

Academic panelists teaching tourism at university level ☐

Participants profile

Date:----------

Name:----------

Occupation: ----------

Level of education:----------

Address:----------

Telephone----------

Gender: 1.Male ☐ 2.Female ☐

Please provide the indicators that you think can promote attractiveness and competitiveness on hot spring tourism in Limpopo province.

A. What are the tourism destination resources and attractions that can be placed in a hot springs?

_____

_____

_____

_____

_____

B. What infrastructure (social and physical) that can be made available to make hot springs attractive.

C. What are the marketing strategies that can be used to market hot springs?

D. What are the factors that determine the rates to charge on tourists in a hot springs?

E. What are the environmental management policies to be put in place in order to conserve and preserve hot springs?

F. What support can the government offer to the development of hot springs?

G. What are the economic factors that can increase tourists to hot springs?

H. What are the local community activities that can complement the attractions to hot springs?

_____

_____

_____

_____

_____

Thank you for your participation

ANNEXURE 3

Delphi questionnaire round 2

Could you please answer the following questions "in this second round of our research in our attempt to get a consensus among the panel of experts with respect to the responses question by the experts in the first round of our questionnaire survey by indicating to what extent you agree or disagree with each statement". This should only take 15 to 20 minutes of your time. If you could fill out this form and return it to me as soon as possible it will be greatly appreciated. **Please be assured that your responses will be held in confidence**.

NOTE: Please indicate the correct alternative by ticking the appropriate box.

Government related tourism organisation (public) ☐

Tourism industry privately owned (private) ☐

Academic panelists teaching tourism at University level ☐

Participant Profile

Date:

Name:

Occupation:

Address:

Telephone no:

Gender 1. Male ☐ 2.Female ☐

Circle the appropriate number, by indicating to what extent you agree or disagree with each statement.

1. Strongly disagree

2. Disagree

3. Uncertain

4. Agree

5. Strongly agree

1. Specific attractions at hot spring destinations to encourage tourists to visit.

Beautiful and clean natural scenery	1	2	3	4	5
Entertainment held at regular basis(music festival)	1	2	3	4	5
Availability and accessibility of swimming pools	1	2	3	4	5
Availability of sports bar and restaurant	1	2	3	4	5
Braai facilities	1	2	3	4	5
Kids park (jumping castle, swing and bumper)	1	2	3	4	5
Full time tour guide officer	1	2	3	4	5
Adventure sports	1	2	3	4	5
Notable historical land mark nearby	1	2	3	4	5
Comfortable climate	1	2	3	4	5
Comfortable climate	1	2	3	4	5

2. Infrastructure (social, physical) to make hot springs attractive.

Adequate and maintained roads	1	2	3	4	5
Leisure activities	1	2	3	4	5
Free wi-fi	1	2	3	4	5
Accessibility of hot spring to handicapped	1	2	3	4	5
Clean ablutions	1	2	3	4	5
Social media	1	2	3	4	5
Overnight accommodation	1	2	3	4	5
Signage	1	2	3	4	5
Museum	1	2	3	4	5
Police station	1	2	3	4	5
Tower	1	2	3	4	5

3. Strategies to market hot springs in Limpopo province

Media (television, newspaper and radio)	1	2	3	4	5
Social media (face book, whatsupp)	1	2	3	4	5
Internet web page	1	2	3	4	5
Establishing a brand name for Limpopo e.g. shot left	1	2	3	4	5
Word of mouth	1	2	3	4	5
Brochures and flyers	1	2	3	4	5
Partnership between hot springs in the province	1	2	3	4	5
Hosting sports events	1	2	3	4	5

4. Factors that determine the rates to charge on tourist at hot springs

Location	1	2	3	4	5
Popularity of the hot spring	1	2	3	4	5
Infrastructure availability	1	2	3	4	5
Safety and security	1	2	3	4	5
Maintenance of hot spring	1	2	3	4	5
Attractive surroundings	1	2	3	4	5
Availability of swimming pools	1	2	3	4	5

5. Environmental management policies to be put in place to conserve and preserve hot springs

No littering signage	1	2	3	4	5
Touch must not touch or take anything from hot spring	1	2	3	4	5
Entry must be monitored	1	2	3	4	5
No bathing in hot spring	1	2	3	4	5
Prohibition of boreholes near the hot springs	1	2	3	4	5
No washing clothes in the hot springs	1	2	3	4	5

Provision of refuse bags	1	2	3	4	5
Prohibition of fire every where	1	2	3	4	5
Responsible tourism	1	2	3	4	5

6. Government assistance for the support of hot springs in Limpopo province

Funding	1	2	3	4	5
Skills to empower local community	1	2	3	4	5
Educating people about the importance of hot springs	1	2	3	4	5
Research findings implementation	1	2	3	4	5
Salary subsidy for tour guides	1	2	3	4	5
Advisory services	1	2	3	4	5
Parking area	1	2	3	4	5
Road maintenance	1	2	3	4	5
Fencing	1	2	3	4	5
Developing the hot springs	1	2	3	4	5
Marketing the hot springs	1	2	3	4	5

7. Economic factors that increase tourists to hot springs

Availability of transportation	1	2	3	4	5
Affordable prices	1	2	3	4	5
Attractions and accommodation	1	2	3	4	5
Political stability	1	2	3	4	5
Less xenophobic attacks	1	2	3	4	5
Less crimes	1	2	3	4	5
Creation of jobs	1	2	3	4	5
Adequate roads	1	2	3	4	5
Availability of tower	1	2	3	4	5

8. Local community activities that complement attractive to hot springs

Cultural activities	1	2	3	4	5
Annual celebration	1	2	3	4	5
Story telling	1	2	3	4	5
Music celebration	1	2	3	4	5
Historical books(belief on healing powers)	1	2	3	4	5
Community cleaning campaign	1	2	3	4	5

Thank you for your participation