Linking destination competitiveness and destination development: findings from a mature Australian tourism destination

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Linking Destination Competitiveness and Destination Development: Exploratory Findings from a Mature Australian Tourism Destination

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Abstract

Whilst the study of tourism destination competitiveness continues to gain interest amongst tourism researchers (Evans, Fox and Johnson 1995; Faulkner, Oppermann, and Fredline 1999; d'Hauteserre 2000; Hassan 2000; Enright and Newton 2004), there is little identifiable research that 1) links this broad concept of tourism destination competitiveness with the development and evolution of tourism destinations, nor 2) suggests the relevance or importance of key competitiveness variables to destinations at different stages of development. In exploring this association, focus group discussions with tourism industry stakeholders were conducted in a mature destination on the East Coast of Australia. Preliminary results from this discussion indicate competitiveness factors related to the 'management' of the destination appear to be of utmost importance to local stakeholders, given the identified stage of development. To this effect, three fundamental elements were identified by respondents: the ability of tourism infrastructure to be maintained and introduced to sustain the destination's appeal; the ability of the local tourism industry and relevant governing bodies to cooperate as a driving force to sustain the destination; and the existence of a strong community vision for the future of tourism.

Keywords: Destination competitiveness, tourism destinations, destination development, regional Australia.

Introduction

In Australia, as throughout many parts of the world, an increasing number of regions are turning to tourism as a vital driver of regional development and as a major source of new employment growth. In some cases, tourism is replacing traditional activities as a major source of income for regional communities (Commonwealth Department of Tourism 1993; BTR Australia 2000). Tourism can create jobs not only directly serving tourists but also in a range of related services, construction and manufacturing industries. Tourism can also be a catalyst for diversifying regional economies, as new tourism infrastructure development may in turn help in the establishment of other industries (Beer, Maude and Pritchard 2003). As such, regions commit considerable funds and resources toward enhancing their image and appeal among tourists.

Tourist destinations and regions compete with each other for various tourist segments. However, no two destinations are matched, or develop at the same rate. Some destinations have an abundance of inherited, natural resources; where others may have limited created assets, such as poor tourism-related infrastructure or other facilitating resources. Given this development has implications for the types of tourists that will be attracted (Ryan, 1991), it is therefore critical that the stage and roots of tourism development is considered when developing a competitive strategy for a destination (Buhalis 2000). Despite such acknowledgements, research seeking to highlight the relationship between principal factors contributing to the competitiveness of tourism destinations, and the stage of development or evolution of a destination, appears to have 'been totally neglected by tourism researchers to date' (Dwyer and Kim 2003, p. 406). This paper analyses the concept of tourism destination competitiveness, and explores the significance of key competitiveness indicators to industry stakeholders in a mature regional tourism region in Australia.

Literature Review

The subject of competitiveness has consumed the attention of researchers, organisations, and policy makers for as long as there have been social, economic, and political units (Porter 1990). In all forms of economic theory, 'competition' is a fundamental concept (Eatwell, Milgate and Newman 1987). There has been no shortage of explanations for why some nations, regions or firms are competitive and others are not. Yet these explanations are often conflicting, with such research failing to reach a consensus as to a universally acceptable definition of competitiveness (Feurer and Chaharbaghi 1994). A number of main elements of competition have been advanced in the literature. Scott and Lodge (1985) classify competitiveness as a country's ability to create, produce and distribute, products and services, both domestically and internationally, while earning rising returns on its resource. Similarly, competitiveness is about producing more and better quality goods, and services that are marketed successfully to consumers at home and abroad (Newall 1992). Further, Feurer and Chaharbaghi (1994, p. 58) argue that 'competitiveness is relative and not absolute. It depends on shareholder and customer values, [and] financial strength which determines the ability to act and react within the competitive environment and...can only be sustained if an appropriate balance is maintained between these factors'.

While the discussions of competitiveness in the general literature are useful in highlighting the various determinants of 'firm' or 'national' competitiveness, they do not address the special considerations relevant to determining tourism 'destination' competitiveness (Dywer and Kim 2003). For example, the discussion of competitiveness in the general economics and business literature has tended to stress competitive advantage, while de-emphasising comparative advantage as a source of competitiveness. When viewed in a tourism destination context, comparative advantage relates to inherited resources such as climate, scenery, flora, fauna, etc., while competitive advantage relates to created items such as the tourism superstructure (that being additional created assets which rest upon general infrastructure and which serve visitor-oriented needs and desires such as hotels, attractions, transport network), the quality of management, skills of workers, government policy and so forth (Dywer and Kim 2003). Extant literature clearly appreciates the importance of both comparative advantage and competitive advantage within the tourism industry, and as such, the importance of understanding the factors that determine the ability of a tourism destination to compete is being increasingly recognised from both a theoretical and managerial perspective (Chon and Mayer 1995; Evans, Fox and Johnson 1995; Faulkner, Oppermann and Fredline 1999; d'Hauteserre 2000; Hassan 2000; Ritchie, Crouch and Hudson 2001).

Destination competitiveness has been defined as the ability of a destination to maintain its market position and share and/or improve upon them through time (d'Hauteserre 2000). It is a general concept that encompasses price differentials coupled with exchange rate movements, productivity levels of various components of the tourist industry, and qualitative factors affecting the attractiveness or otherwise of a destination (Dwyer, Mistilis, Forsyth and Rao 2001). Competitiveness also refers to a destination's ability to create and integrate value-added products that sustain its resources while maintaining market position relative to competitors (Hassan 2000) and the relative ability of a destination to meet visitor needs on various aspects of the tourism experience, or to deliver goods and services that perform better than other destinations on those aspects of the tourism experience considered to be important by tourists (Dwyer and Kim 2003).

Despite numerous definitions, few frameworks have been developed to assess the competitiveness of a destination. Poon (1993) suggests four key principles which destinations must follow if they are to be competitive: put the environment first; make tourism a leading sector; strengthen the distribution channels in the market place; and build a dynamic private sector. While such principles have merit, clearly they are too broad and general to be meaningful to tourism stakeholders and policymakers (Dwyer and Kim 2003; Ritchie and Crouch 2003). Some tourism researchers (see for example Fabricius 2001) have affirmed that generic competitiveness models derived by theorists such as Porter may be utilised in a tourism context. In 1993, Ritchie and Crouch developed the Calgary Model of Tourism Competitiveness, arguing that the nature of economic competitiveness models, such as those advanced by Porter, appeared to be just as applicable at the destination level (Table 1).

TABLE 1
THE CALGARY MODEL OF COMPETITIVENESS IN TOURISM

Destination Appeal	Destination Management	Destination Organisation	Destination Information	Destination Efficiency
ATTRACT Destination Attractiveness DETER Destination deterrents	MANAGER Managerial Efforts MKGT Marketing efforts	DMO Management organisation capabilities ALLIANCE Strategic alliances	MIS Internal management information system RESEARCH Research	IOE Integrity of experience PROD Productivity

Source: Ritchie and Crouch 1993, p. 48.

Ritchie and Crouch's (1993) Calgary model recognised 5 key constructs of destination competitiveness. These constructs are underpinned by a number of destination related factors. At the outset, Ritchie and Crouch identify a destination's appeal to be a factor of tourism destination competitiveness, referring to the destination attractors and deterrents. Attractors include eleven elements: natural features, climate, cultural and social characteristics, general infrastructure, basic services infrastructure, tourism superstructure, access and transportation facilities, attitudes towards tourists, cost/price levels, economic and social ties and uniqueness. Among destination deterrents are security and safety (i.e. political instability, health and medical concerns; poor quality of sanitation; laws and regulations such as visa requirements). These factors can act as a barrier to visiting a particular destination.

The Calgary model further emphasises that a carefully selected and well executed program of destination management can serve to improve the tourism competitiveness of a destination. In particular, marketing efforts have the potential to enhance the perceived appeal (e.g. image) of a destination, whilst managerial initiatives can strengthen the competitive position of a destination. The model also argues that destination competitiveness can be enhanced through management organisation capabilities and strategic alliances. Additionally, the use of detailed information systems is advanced as a basis for decision making, where internal management information provides the ability to better manage the performance of destination's product. This aspect of the model is closely linked to a research function, as research enables a destination to adapt to changing market conditions. The final construct in the model is Destination Efficiency, which draws on the integrity of experience, relating to the ability of the destination to provide an appropriate (expected and promised) experience. The second set of the efficiency factors are termed by the authors as productivity variables. These include variables which are hypothesised to develop skills and/or conditions which can increase the quantity and quality of the output of tourism experiences for a given level of resource input, such as training staff. Over a number of years, Ritchie and Crouch further refined the concepts and propositions underlying the Calgary model, to a point where it has developed to its current form (Ritchie and Crouch 2003). This more complex model has some 36 factors divided into five categories with relatively complex interrelationships. Discussion on each of these factors is beyond the scope of this paper.

Chon and Mayer (1995) suggested enhancements to the five constructs on the Calgary model. They proposed the inclusion of sub factors 'substitutes' for the appeal dimension, 'entry/exit barriers' for the management dimension, 'organisational design' for the organisation dimension, 'technology' for the information dimension, and 'value' for the efficiency dimension. Additional frameworks have also been developed, such as Faulkner, Oppermann and Fredline (1999); Hassan (2000); and Murphy, Pritchard and Smith (2000), whose simplified model highlights the intention of return visitation to a region.

Dwyer, Livaic and Mellor (2003) in their model of destination competitiveness, brought together the main elements of the wider competitiveness literature (Porter 1990; Moon and Peery 1995; Narasimha 2000; Waheeduzzan and Ryans 1996), whilst incorporating elements of destination competitiveness as defined by other researchers (Buhalis 2000; Hassan 2000; Mihalic 2000). Their research aimed firstly to develop a model of destination competitiveness; and second, to set out the results of a survey, based on indicators associated with the model, to determine the competitiveness of Australia as a tourist destination. The model contains many of the variables and category headings identified by Crouch and Ritchie in their seminal competitiveness research, but it does differ in a number of aspects. In particular, the present model explicitly recognises demand conditions as an important determinant of destination competitiveness. It also explicitly recognises that destination competitiveness is not an ultimate end of policy making but is an intermediate goal towards the objective of regional or national economic prosperity (Dywer and Kim 2003).

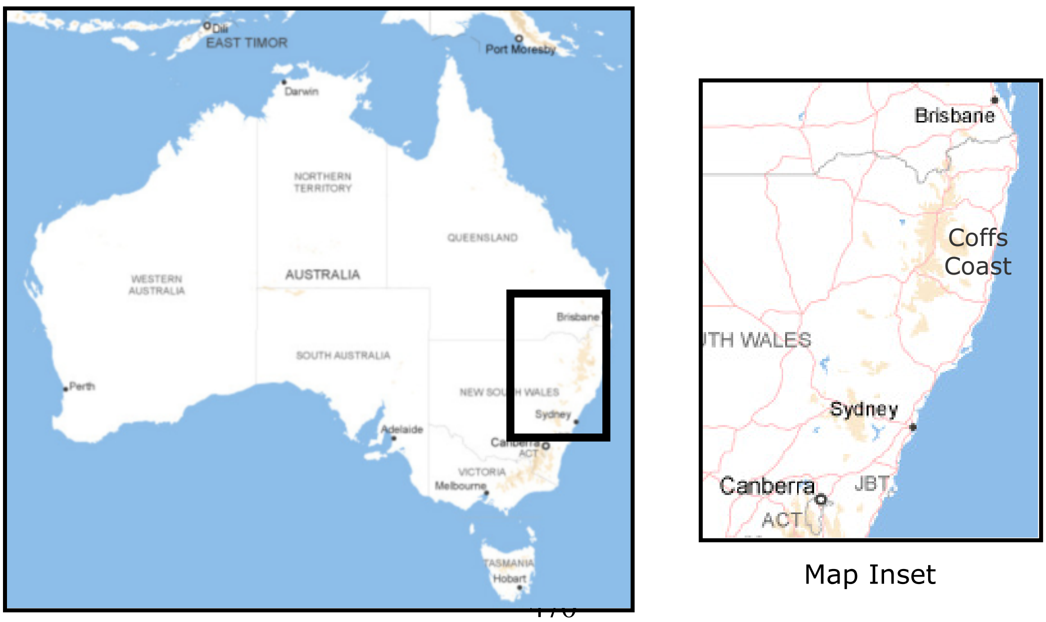
Understanding the sequence of events or phases that mark the history of the destination can also assist in bringing a destination’s inherent potential and its impediments into sharper focus (Faulkner and Tideswell 2002). Butler's (1980) paper on destination development signified a fundamental turning point into life cycle research, by intending to show the development of a destination in terms of the series of life stages defined by infrastructures and number of visitors. Hovinen’s (1981) work in Lancaster County, Pennsylvania, likely the first use and examination of Butler's tourism area life cycle (TALC) model, concluded that a destination may be categorised by the co-existence of several development stages, a stance supported by other tourism researchers (see for example Harrison 1995). In recognising this feature, Hovinen substituted Butler’s phases of consolidation (commonly characterised by factors such as: early signs of declining visitor numbers; the emergence of discontent towards tourism among permanent residents; some deprivation and restrictions placed upon visitor activities) and stagnation (where an area is seen to have poorly maintained accommodation and amenities; has a well-established image, but is no longer in fashion; has a heavy reliance on repeat visitation traffic) with a stage termed ‘maturity’.

Having resolved that different destinations are affected by a recognised pattern of development, some tourism researchers (Dwyer and Kim 2003; Enright and Newton 2005) argue that the *principal factors contributing to competitiveness will vary amongst destinations, and as such, destinations must take a more tailored approach to enhancing and developing tourism competitiveness, rather than adopting a single, universal policy or strategy*. Of particular interest is the relevance or importance of key competitiveness variables to destinations at different stages of development or evolution. This paper therefore aims to examine the association between key destination competitiveness variables and the stage of development for a tourism destination, by presenting preliminary results from focus group discussions with industry stakeholders within a mature destination on the East Coast of Australia: the Coffs Coast Tourism Region.

Coffs Coast Tourism Region

The Coffs Coast Tourism Region is visited by an estimated one million tourists per annum. The Coffs Coast consists of three local government areas. They are the City of Coffs Harbour, the Shire of Nambucca and the Shire of Bellingen. The region is 550 kilometres north of the city of Sydney, the capital of New South Wales and 430 kilometres**,** south of Brisbane, the capital city of the state of Queensland. The coastal destinations of Coffs Harbour and Nambucca are characterised by a mild, pleasurable climate with spectacular beaches and coastal scenery. Bellingen is an attractive rural area, with scenic vegetation, surrounding wooded, sub-tropical ranges and meandering rivers flowing from the Dorrigo World Heritage Area to the Pacific Ocean. Figure 1 shows the location of the Coffs Coast on the East Coast of Australia.

FIGURE 1
LOCATION OF THE COFFS COAST (EAST COAST OF AUSTRALIA)



There are a number of indicators that the Coffs region is currently a destination in the mature stage of the tourism life cycle. In spite of the Coffs Coast being a popular holiday destination for visitors for many years, visitor numbers to the region have been seen to decline. Data from the National Visitor Survey, a primary measure of domestic tourism activity travel patterns of domestic tourists within Australia, indicates that visitor numbers decreased in the region from 1,055,000 in the year ending June 1999, to 999,000 in the year ending 2005. Recently released figures by Tourism Research Australia indicate further deterioration of domestic tourist visitations to the Coffs Coast region, with 971,000 visitors in the year ending June 2006 (Tourism Research Australia 2007).

Over the same time period, the sum of visitor nights declined from 3,773,000 to 3,480,000 respectively (Tourism Research Australia 2007). Through the period January 1998 to December 2001, the State of NSW as a whole, experienced stable domestic tourist visitation while the North Coast Region of the State experienced declines of over five percent. The decline was recorded principally in the holiday/leisure market (ATS Group 2004, p. 19), and has since continued beyond 2002. According to Tourism NSW (2007), the number of trips taken domestically by Australians (year ending March 2007) to regions such as the North Coast of NSW was down by 2.4 percent compared to four years ago. Through this volatility, the Coffs Coast has experienced declines in both visitors and visitor nights greater than the North Coast Region and the State (Coffs Coast Marketing 2007). The North Coast Regional Tourism Plan 2004-2007 highlights a number of factors which may have contributed to this decline, namely increased tourism investment and resources applied at other popular coastal 'hot spots', some of which fall within a 'competitive set' challenging the Coffs Coast region; an increasingly number of 'like' destinations along the coastal fringe of NSW, improved transportation access to competing destinations (including capital cities), increasing price competition, and strong competitive regional marketing campaigns highlighting other regions of the State and Country.

While trends in visitor numbers have been the most commonly used indicator of the stage reached in a destination's development, a number of authors (Butler 1980; Cooper 1990; Haywood 1986; Morgan 1991; Faulkner and Tideswell 2005) have identified a more comprehensive range of evolution indicators pointing to destination maturity. These are outlined in Table 2. Following an analysis of the Coffs Coast's position with respect to the indicators contained in Table 2, it is reasonable to at least conclude that the Coffs Coast is a mature destination showing signs of stagnation.

TABLE 2
DESTINATION STAGE OF DEVELOPMENT: INDICATORS OF MATURITY

Area of destination performance	Indicators
1. Changing markets	▪ Growth in low-status, low-spend visitors and day visitors ▪ Overdependence on long-haul market ▪ Emphasis on high-volume, low-yield inclusive tour market ▪ A decline in visitors length of stay ▪ **Decline in overall visitations** ▪ Type of tourists increasingly organised mass tourists ▪ A declining proportion of first-time visitors, as opposed to repeat visitors ▪ **Highly seasonal**
2. Emerging newer destinations	▪ **Competition from emerging newer destinations** ▪ **The destination is well known, but no longer fashionable**
3. Infrastructure	▪ **Outdated, poorly maintained accommodation and amenities** ▪ Older properties are changing hands and newer properties, if they are being built are on the periphery of the original tourist areas ▪ **Market perceptions of the destination becoming overcommercialised, crowded and 'tacky'** ▪ Diversification into conventions and conferences to maintain numbers

	▪ Large number of man-made attractions, which start to outnumber the more natural attractions that made the place popular in the first place
4. Business performance	▪ **Declining profits of major tourism businesses** ▪ **Lack of confidence in the tourism business community** ▪ A decline in the elasticity of advertising ▪ **Lack of professional, experienced staff**
5. Social and environmental carrying capacities	▪ Visitor levels approaching or exceeding social and environmental carrying capacities ▪ Local opposition to tourism as the resort's (destination) residential role increases
6. Institutional environment	▪ **Local government reorganisation (amalgamation) diluting the political power of resorts (destinations) in larger authorities** ▪ **Demands for increased operational efficiency and entrepreneurial activity in local government** ▪ Short-term planning horizons in local government owing to financial restrictions and a low priority given to strategic thinking ▪ **Shortage of research data**

Indicators in bold apply to the Coffs Coast on the basis of existing data (modifications from Butler 1980; Cooper 1990; Haywood 1986; Morgan 1991; Russell and Faulkner 1999; Faulkner and Tideswell 2005).

Methodology

A list of possible focus group participants was derived by the researchers. Potential participants were then provided with a Research Information Sheet, in an effort to fully explain the reasons and nature of the study. In total, 15 tourism representatives within the case region agreed to participate in the discussion, which was conducted in February 2008. This number ensured that the group was workable, given larger numbers tend to constrain or limit the interactions between members (Jennings 2001), and allowed sufficient variation to allow for constraint opinions (Krueger and Casey 2000). Key tourism stakeholders included representatives from chambers of commerce, local government bodies, local tourism agencies, tourism associations, bureaus and peak bodies; and tourism operators. Justification for utilising tourism 'experts' in focus groups, as opposed to tourists, has strong support within the destination competitiveness literature. Crouch (2007) asserts that judgment based on experience, expertise and insight is, in itself, a valuable source of information.

'The collective experience, knowledge, and insights of tourism destination managers, researchers and others who have spent time addressing the challenge of what makes a destination competitive, can provide a useful starting point for an analysis such as this' (Crouch 2007, p. 7). Enright and Newton (2005) also draw attention to the fact that it is not uncommon for destination factors to be evaluated by practitioners (see for example Evans and Chon 1989; Faulkner, Oppermann, and Fredline 1999; March 2004), with their research suggesting that their views do constitute accurate measures of competitiveness. In addition, Gearing, Swart and Var (1974) in particular argued the case for using respondents who were widely experienced in dealing with tourists rather than the tourists themselves. They suggested that such 'experts' would be able to speak for the tourists, given their experience, and that each expert opinion would be representative of a large group of tourists.

At least as a first step, a study based on an analysis of expert judgement seems to be a much more sensible starting point as a means of estimating the relative importance of each of the large number of attributes involved in the study of destination competitiveness (Crouch 2007). Consequently, such practitioners are viewed as an appropriate population to respond to this stage of the research (see the section Conclusions and Future Research for further information on this ongoing research undertaking).

Three data collection tactics were employed in this research. First, hand written notes, taken by a recorder during the 90 minute discussion, assisted in describing the context and the flow of the interview. Second, in addition to these notes, audio of the conversation was captured via a digital recording device. Third, participants were required to read and complete a discussion guide, as a record of points raised. The analysis of the audio transcription, and corresponding notes, was conducted manually, with emphasis provided to particular patterns, themes, concerns or responses posed repeatedly by the respondents. Once completed, interpretations of the results were cross-checked by the researchers to ensure validity of the interpretation.

Exploratory Findings and Discussion

Initially, participants were asked whether, in their opinion, they agreed with the earlier judgment that the Coffs Coast was a mature destination. Members of the group strongly supported this conclusion. The following statements were found to be indicative of the wider view of the group:

> …"Yes – it has not evolved with consumer demands…there has been little capital injection into the destination, in order to revitalise it".
>
> …" The Coffs Coast is not attracting new markets. It's no longer seen as a cool or exciting destination".
>
> …"Agree – because the Coffs Coast has not seen any major injection of tourist facilities since the resort development of the 80s. Coffs in not unlike a number of coastal places that have relied on the sea change tourist".
>
> …"Yes – the Coffs Coast is definitely a mature destination. The physical attributes of the area are tried. Services in the area are tried and not appealing. The current promotion and strategic development is stale".

March (2004) maintains that since destinations compete for target segments, the best means of understanding destination competitiveness is to assess how a destination competes against its main competitors in those segments. In support of this assertion, participants were then invited to think about the competitiveness of the Coffs Coast in relation to a key competitor destination (the Great Lakes Tourism Region of New South Wales) that was not mature in terms of its life cycle, but with whom the Coffs Coast competes against for a specific market segment, namely domestic family/leisure visitors.

Stakeholders were then asked to identify those elements considered critical in improving the competitiveness of a destination categorised as mature. Specific questions asked of the group included (but were not limited to):

- Name those elements you consider critical in improving the competitiveness of a destination categorised as mature?
- In which ways do you believe the critical competitiveness factors important to a destination in a stage of maturity differ from a destination which is, for example, developing?

Given a large number of variables are linked to the notion of destination competitiveness, it is not surprising that numerous general elements of competitiveness were acknowledged. However, three critical elements emerged from the discussion (through frequency of reference). These elements specifically relate to the 'management' of the destination. It is those elements which will be expanded upon in this section.

Infrastructure

The preservation of current and the development of new, infrastructure was considered by participants to be a major aspect in enhancing the competitiveness of a destination facing maturity. Destinations must ensure that their general infrastructure is as user-friendly to visitors as possible, as many destinations fail at this fundamental undertaking (see for example Pigram 1999; Diaz 2001; Buhalis 2000), whilst the quality of a tourism infrastructure (sometimes termed tourism superstructure) also serves to attract or deter tourists. It has been shown that the image of infrastructure will play some role into the image of a competitive destination (Chen and Kerstetter 1999; Jenkins 1999; Hankinson 2004). As a maturing destination, this aspect appears important within the Coffs Coast region, as detailed in the following statements:

…"You're getting repeat business, but the accommodation offerings are getting old... it's hurting us!".

…"Developing destinations have easier access to the 'spotlight'. It is important as a mature destination that we still evoke the 'spark' in people's minds with the understanding that we have the potential to meet their needs".

…"When a destination is mature, some facilities are old and tried. In a developing destination, they take a new, fresh and vibrant outlook. A mature destination can be stifled by negativity".

General infrastructure, especially in regional and rural locations within Australia, is generally delivered by local government authorities. In the case of the Coffs Coast, this involves Coffs Harbour City Council, Nambucca Shire Council and Bellingen Shire Council. As a result, these authorities have the ability to heavily influence the overall effectiveness, and by extension, competitiveness of this element.

Furthermore, infrastructure has been seen to significantly affect the performance and operation of suppliers, tourism enterprises, marketing intermediaries and other supporting industries, in that poor or outdated infrastructure can potentially produce an unproductive environment in which such supporting firms are to function (Ritchie and Crouch 2003). This again appears relevant to the maturing case destination, as illustrated by the following comment:

…"It's a catch-22 though; commercial interests are not investing in the Coffs Coast because the tourism industry is in decline".

Industry collaboration and cooperation

Collaboration is 'a process of joint-decision making among key stakeholders of a problem domain about the future of that domain' (Gray 1985, p. 227). Collaboration thus creates a temporary forum within which consensus about the problem can be sought, mutually agreeable solutions can be invented, and collective actions to implement the solution can be taken (Gray 1985, pp. 5-6).

The importance of involving a diverse range of stakeholders in tourism destination development and planning is well recognised. Quite often, however, this type of planning requires cooperation between government agencies, various levels of government, public and private sectors. It is therefore not uncommon that the divergent views held by such stakeholders may, at times, hinder attempts for collaboration. This may be due, in part, to Edgell's (1990, p.7) assertion that 'there is no other industry in the economy that is linked to so many diverse and different kinds of products and services as is the tourism industry'.

The perceived lack of cooperation among tourism stakeholders within the Coffs Coast tourism region is emphasised by the following statements made by stakeholders:

..."One of the issues the Coffs Coast is experiencing is that it's being promoted as a single entity, or a single experience, but in fact is managed in a very fragmented fashion. We are promising something, but not delivering on the promise".

…"It comes back to all the stakeholders, we need to get that cohesion".

…"There is a big difference between local government and operators. It can't just be local government managing the destination, there needs to be a solid base of interaction with operators and other stakeholders".

…"Local government tends to work in isolation".

In spite of such a strong desire by group participants to work more 'collaboratively' with stakeholders (especially local government), the simple adoption of a collaborative planning process at the destination level is not as straightforward for a mature destination. According to Cooper (2002), the stage of the destination in the life cycle heavily influences the acceptability of a destination-wide planning exercise. In the early stages of the life cycle for example, success often obscures the long term view, whilst in the later stages, particularly when a destination is in decline, opposition to long term planning exercises may be rationalised on the basis of cost.

In seeking to remedy the issue of local opposition, focus group participants identified the development of a community tourism vision as an important starting point from which whole-of-destination collaboration may occur.

Community Vision

Visioning aims to develop 'a clear and succinct description of what the…community should look like after it…achieves its full potential' (Bryson 1995, p. 155). As a community-based planning approach, destination visioning effectively places the future of the destination in the hands not only of government and industry, but also of the local community. As Ritchie (1993, p. 379) states, 'residents of communities and regions affected by tourism are demanding to be involved in the decisions affecting their development'.

As seen in the following comments, participants pointed to the importance of developing a whole-of-destination vision for the case destination:

> …"It's about the vision. It's the point of differentiation. But as a destination, we have never sat down and identified our vision or point of difference".
>
> …"The airport is not seen as a transport gateway; it's a separate entity that gets 300,000 odd passengers. There's not really an understanding that it's part of the wider tourism industry. We need to change this mindset".

This challenge appears to conform closely to the first of Ritchie's (1993) three key elements of a destination/community visioning process, being:

1. The vision must bring together the views of the whole community and all tourism stakeholders;
2. The vision must reach consensus and endorsement of the future; and
3. The vision defines the long term development of the destination.

Despite this logical sequence of the visioning stages, tourism researchers have identified there are potential problems with the approach (Ritchie 1993; Helling 1998). These include: the difficulty of obtaining representation across the community; the difficulty of obtaining consensus on controversial issues; and the difficulty of implementing the vision. Notwithstanding such issues, Cooper (2002) views destination visioning as becoming the new tool for sustainable and strategic tourism planning for tourism destinations, as tourism catches up with the imperative of community involvement and embraces the need to manage change. Of promise to stakeholders of the Coffs Coast tourism region is the knowledge that visioning projects have proven successful in regions close to the Coffs Coast, including the Gold Coast (undertaken in 1999) and the Tweed Shire (located in Northern New South Wales, and undertaken in 2002).

Conclusions and Future Research

At this time, little is known about the relative importance of factors of competitiveness to destinations at different stages of development or evolution. Quite simply, it has been argued, conceptually, that at each stage of the life cycle, the mix of evolutionary and competitive forces differs and thus, strategies to deliver a sustainable destination should be distinctive at each life cycle stage (Cooper 2002). It is therefore the aim of this paper to present preliminary findings from focus group discussions with industry stakeholders in a single mature case destination, located on the East Coast of Australia.

According to the results reported on in this paper, key stakeholders in the tourism industry have confirmed that the factors that are considered most important to a destination considered to be at the mature stage of its life-cycle, are quite distinct to those factors of importance for destinations at other stages of the destination lifecycle. The key competitiveness factors believed to be of critical importance to the mature destination are the ability of tourism infrastructure to be maintained and introduced to sustain the destination's appeal; the ability of the local tourism industry and relevant governing bodies to cooperate as a driving force to sustain the destination; and the existence of a strong community vision for the future of tourism. It is argued that these three factors are of critical importance for a destination to manage in order to continue to grow rather than to stagnate as Butler's (1980) destination life cycle model suggests.

This research is continuing to gather data from expert respondents across additional case locations in regional Australia. Equally important in defining and analysing tourism destination competitiveness is the need to incorporate consumer input and perceptions into competitiveness research (Dwyer, Livaic and Mellor 2003). It could be argued that certain components of the model, like quality of service, accessibility, entertainment and hospitality, should be measured by direct consumer surveys, rather than indirect measures (Hudson, Ritchie and Timur 2004). Therefore this project will obtain via sample survey methods, important information and insights into factors influencing consumer choice of regional tourism destinations. When combined with 'expert' observations, this research will provide a holistic measure of competitiveness within regional Australian tourism destinations.

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