

# ***THE DYNAMICALLY CHANGING TOURISM LANDSCAPE: POSING NEW CHALLENGES & OPPORTUNITIES FOR THE COACH INDUSTRY***



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# LET'S START WITH SOME QUOTES

*“Coaches are one of the cleanest forms of transport and can reduce congestion. A coach carrying 50 passengers takes the place of more than 20 cars, freeing up space in car parks. Their passengers help the local economy too, with domestic visitors on organised coach tours, spending 1.4 billion pound”*

*Visit England Report, 2014*



*“...Coaches are the CO2 champions among all categories of travel modes (individual car, plane and rail,) and in all travel configurations (short, medium and long distance)”*

*American Union of Concerned Scientists Report, 2016)*

*“Coaches are seven times safer than travelling by car”*

*Confederation of Passenger Transport (CPT), 2014*

# A PICTURE SAYS A THOUSAND WORDS!



RVBW.ch

Source: Kamberski, May 2017

**COACH TOURISM DOES/CAN OFFER GREAT BENEFITS AS ELEMENT OF THE TOURISM VALUE CHAIN**  
**- DEPENDING ON HOW WE NAVIGATE (MANAGE, POSITION AND MARKET) THE COACH TOURISM JOURNEY INTO THE FUTURE!**

**SAFETY**

**ENVIRONMENTALLY FRIENDLY**

**VALUE FOR MONEY**

**CONVENIENCE**

**RELAXING AND COMFORTABLE**



**LESS CONGESTION**

**GREAT EXPERIENCE IN IT'S OWN RIGHT (DELIGHT CONSUMERS! – KEY E'S!)**

# THE KEY POINT OF DEPARTURE FOR THIS PRESENTATION

**THINK  
GLOBALLY**



**INTERNATIONAL  
"VISION 2030" FOR  
BUSES AND COACHES  
PROJECT (IRU)**

**PLAN AND CO-  
ORDINATE WITHIN  
THE REGIONAL  
CONTEXT**



**SA NATIONAL  
TOURISM SECTOR  
STRATEGY (NTSS)  
FINALIZATION**

**IMPORTANTLY,  
ACT  
LOCALLY!**



# LET'S ALSO START WITH A QUESTION?



**WHERE IS THIS?**



**AND THIS?**

# THE ANSWER!



**DUBAI IN 1991**



**DUBAI 25 YEARS LATER!**

**“THE TIMES CERTAINLY ARE A-CHANGING” AS BOB DYLAN SANG IN 1964, POSING NEW CHALLENGES AND OPPORTUNITIES TO TOURISM STAKEHOLDERS -**  
***ALSO IN THE TOURISM COACH INDUSTRY!***

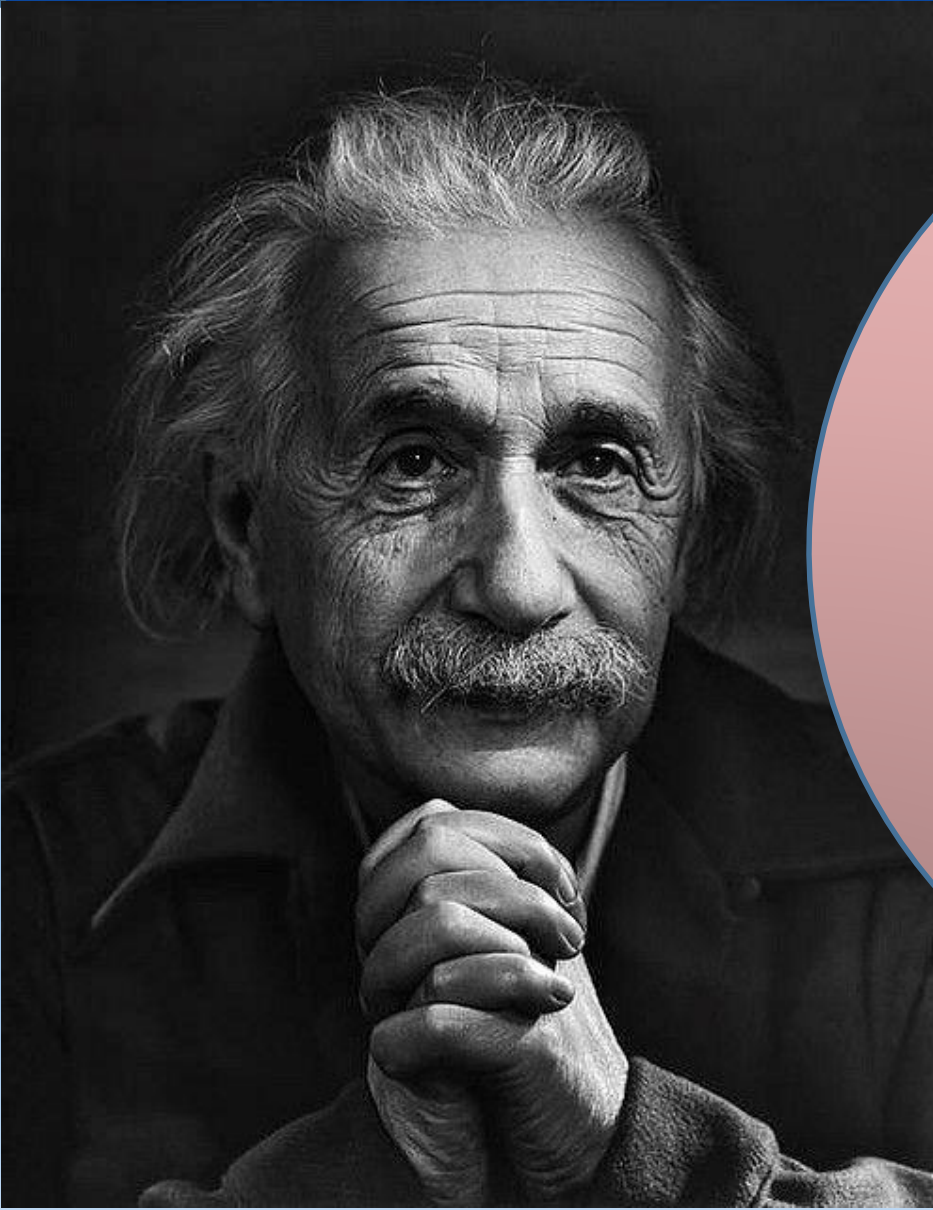


**“The future is already here it’s just unevenly distributed”**

**- William Gibson**



# SOME FOOD FOR THOUGHT AS WE REFLECT ON THE CHANGING ENVIRONMENT!



*The world we have created is a product of our thinking; it cannot be changed without changing our thinking.*

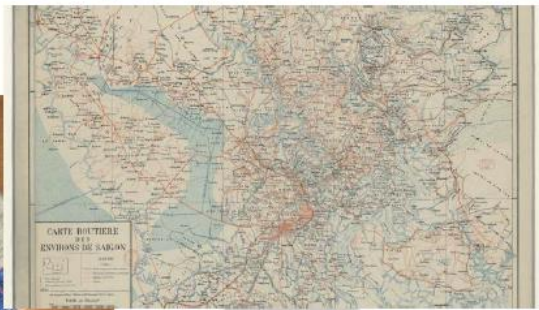
*No problem can be solved with the same consciousness that created it.*

*We must learn to see the world anew.*

# LET'S REFLECT – HOW MANY ITEMS IN OUR DAILY LIVES HAVE VIRTUALLY DISAPPEARED DURING THE PAST 25 YEARS?



Arcades



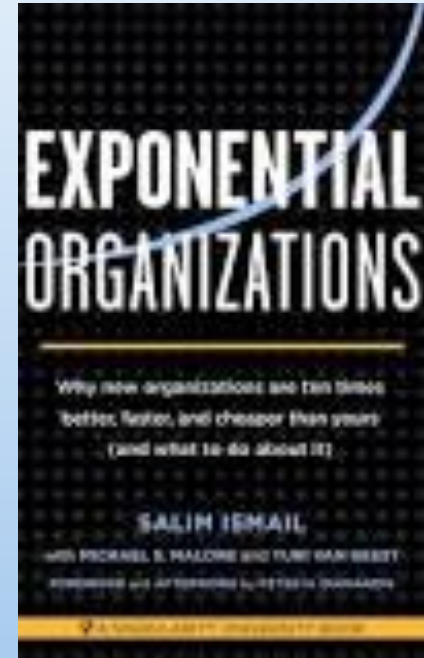
# THE ERA OF THE EXPONENTIAL ORGANIZATION IS WITH US

**“89% of the Fortune 500 companies from 1955 were not on the list in 2014”**



**“In the next 10 years 40% of all S&P companies will disappear from the list”**

**STANDARD  
& POOR'S**



# TECHNOLOGY IS OPENING UP MANY NEW OPPORTUNITIES!

## SOLAR ENERGY

Costs down from  
\$30 per KWh) in  
1984 to \$0.16 in  
2014

**(200X in 30 years)**



## DRONES

Costs down from  
\$100,000 in 2007 to  
\$700 in 2013

**(142X in 6 years)**



## 3D PRINTING

Costs down from \$40 000  
in 2007 to \$100 in 2014

**(400X in 7 years)**

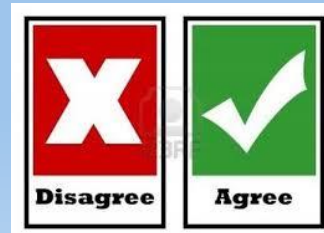


**A HARSH REALITY: TECHNOLOGY AND SOFTWARE ARE  
EATING THE WORLD IN ALL SECTORS -  
ALSO IN THE TOURISM COACH INDUSTRY**

**“In the future every company will become a software  
company”**

**Mark Andreessen, founder of Netscape**

**Who agrees?**



# DISRUPTION IS INCREASINGLY AROUND US – MAINLY BECAUSE OF TECHNOLOGY (SOFTWARE)!

Uber – the world’s largest taxi company –  
**owns no vehicles**



Airbnb – the world’s largest accommodation provider - **owns no real estate**



Netflix is disrupting cable



Large phone companies own no phone infrastructure



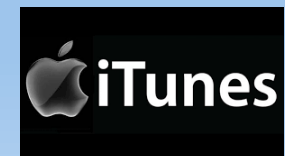
Facebook – the world’s most popular media owner- **creates no content**



Alibaba.com – the world’s most valuable retailer –  
**has no inventory – also Alitrip**



Apple  
i-tunes is disrupting record labels



# LET'S REFLECT FOR A MOMENT - THE GLOBAL DIGITAL SITUATION IN JANUARY 2017



TOTAL  
POPULATION



we  
are  
social

**7.476**  
BILLION

URBANISATION:  
**54%**

INTERNET  
USERS



**3.773**  
BILLION

PENETRATION:  
**50%**

ACTIVE SOCIAL  
MEDIA USERS



we  
are  
social

**2.789**  
BILLION

PENETRATION:  
**37%**

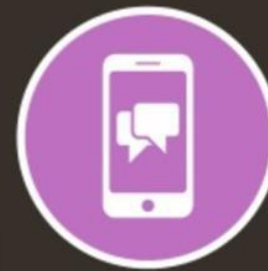
UNIQUE  
MOBILE USERS



**4.917**  
BILLION

PENETRATION:  
**66%**

ACTIVE MOBILE  
SOCIAL USERS



**2.549**  
BILLION

PENETRATION:  
**34%**

# THE SHARE OF WEB TRAFFIC BY DEVICE IN JANUARY 2017 - THE FORESEEABLE FUTURE IS MOBILE!



LAPTOPS &  
DESKTOPS



**45%**

YEAR-ON-YEAR CHANGE:

**-20%**

MOBILE  
PHONES



we  
are  
social

**50%**

YEAR-ON-YEAR CHANGE:

**+30%**

TABLET  
DEVICES



StatCounter

**5%**

YEAR-ON-YEAR CHANGE:

**-5%**

OTHER  
DEVICES



**0.12%**

YEAR-ON-YEAR CHANGE:

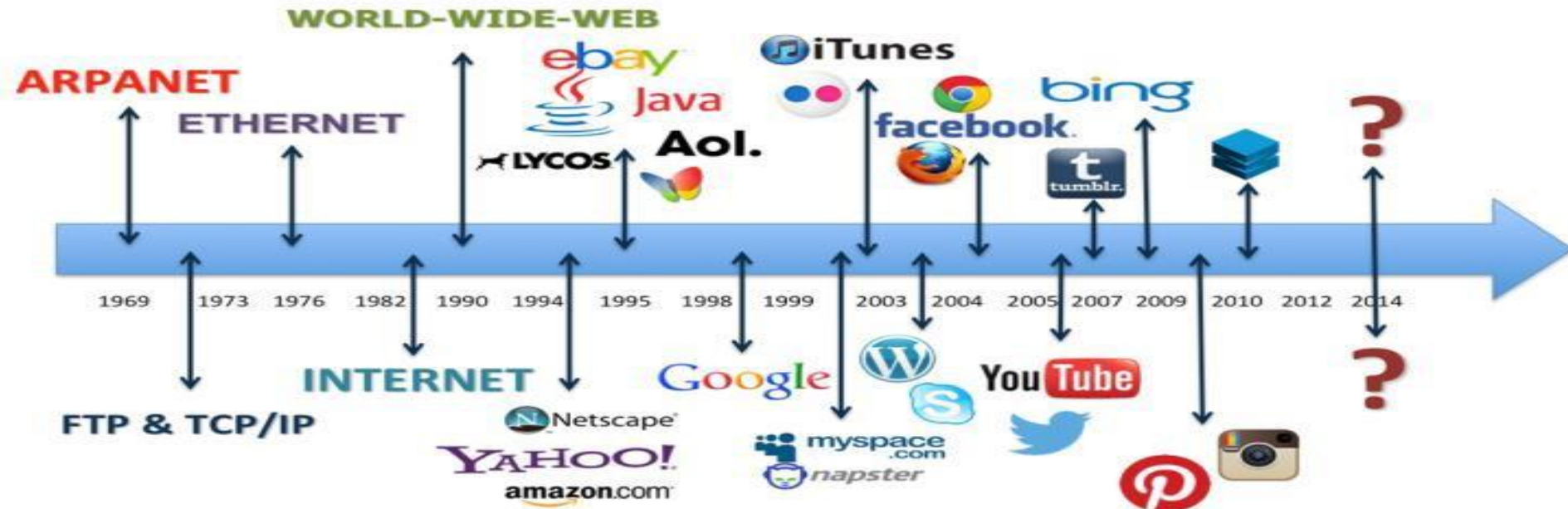
**+33%**



# A HARSH REALITY – DIGITAL TECHNOLOGY DEVELOPS AND CHANGES FASTER AND FASTER!

- WWW - 46 YEARS OLD
- EMAIL - 45 YEARS OLD
- GOOGLE - 18 YEARS OLD

- YOUTUBE - 13 YEARS OLD
- FACEBOOK - 12 YEARS OLD
- iPad - 8 YEARS OLD



# TOURISM MARKETING IS ALSO BEING DISRUPTED FROM VARIOUS ANGLES

Consumers are increasingly controlling tourism brand identities

Disintermediation is a reality

It's no longer top-down communication, but two-way communication (listen and speak)



# SOME CURRENT DISRUPTORS

Uber disrupting taxis

UBER vs TAXI

Airbnb disrupting traditional accommodation providers



Social media disrupting DMO's and Tourism Information Centres (TIC's)



Platforms such as Alitrip.com, Coachsurfing.com and Vayable are disrupting traditional tour operators

Undiscovered authentic destinations are being exposed and discovered via technology



# WHAT WILL THE FUTURE DISRUPTORS BE?

**Will globalization and commodization erode the authenticity and specialness of many destinations?**



**Will uncontrolled volumes of tourism deteriorate iconic tourism attractions?**



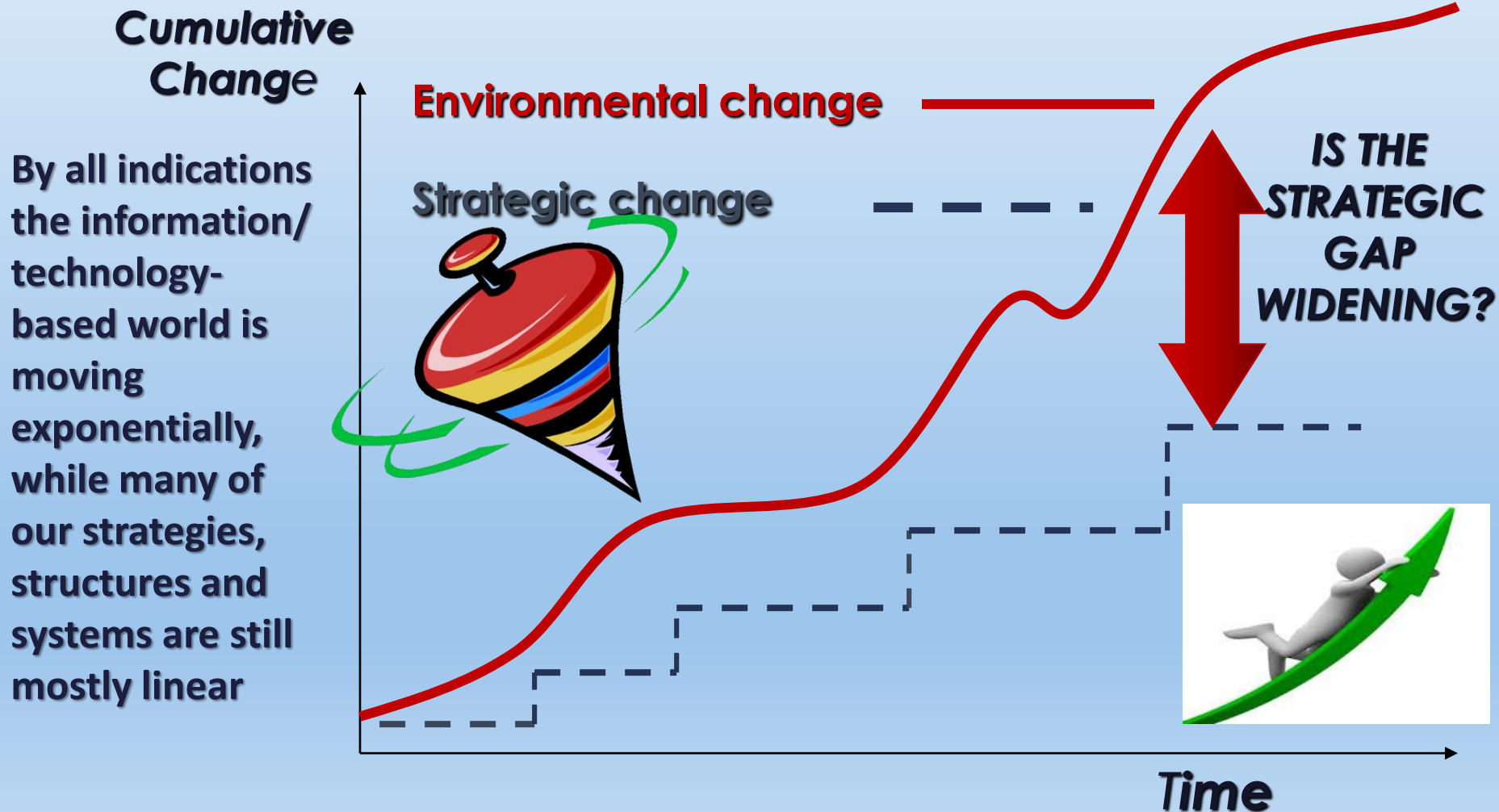
**Will driverless vehicles disrupt traditional coach travel?**



**Will virtual travel disrupt actual travel?**



**A CONTINUOUS CHALLENGE IN THE TOURISM COACH INDUSTRY: PRO-  
ACTIVELY RESPONDING TO THE CHANGES IN THE MACRO, COMPETITIVE  
AND MARKET ENVIRONMENTS - AVOIDING STRATEGIC DRIFT**



***WE WILL HAVE TO INNOVATIVELY AND CREATIVELY LOOK AT THE  
“CHANGING TOURISM WORLD” THROUGH “FRESH” AND FUTURE-  
ORIENTATED EYES WHEN WE CHART OUR  
FUTURE TOURISM COACH JOURNEY***



**POSSIBLY WE SHOULD CONSIDER:**



**2010**

***MANAGING AND  
MARKETING OUR  
TOURISM COACH  
INDUSTRY AS IF IT IS  
2020 AND NOT 2010!***



# IN THE PAST TOURISM WINNERS AND CHAMPIONS WERE CHARACTERIZED BY:

**Iconic attractions and experiences**



**Customers who were exposed to limited information**



**Communication was largely controlled and "top down"**



**Big budgets and extensive marketing campaigns**



**Limited and definable competition**



**Broad-based target markets**





# THERE ARE NEW RULES TO SUCCESS: TODAY'S (AND TOMORROW'S) WINNERS AND CHAMPIONS ARE INCREASINGLY:

**Embracing change and innovating to gain competitive advantage**



**Seamlessly link customers, products, and experiences to enhance competitiveness**



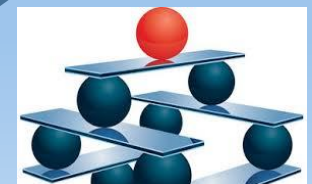
**Focus on differentiating offerings and providing consumer-driven “experiences”**



**Explore strategic alliances and collaborative opportunities**



**Focussing on balancing tourism industry, community, visitor and environmental interests**



# KEY DRIVERS OF CHANGE IS AFFECTING US ALL!

## MACRO SUPPLY-SIDE DRIVERS

- Economic turbulence
- Climate change
- Globalization
- Intensification of competition
- Technological advances
- Innovation at all levels
- Sustainability

## **THE CONTINUOUS CHALLENGE**

*Creating a  
strategic fit*



*and alignment  
with  
changing  
macro,  
competitive  
and market  
environments*

## DEMAND-SIDE DRIVERS

- Power shift to consumers
- Demographic changes
- Consumers are increasingly co-creators/experience seekers
- Increasing importance of value for money
- Sustainability

**DISRUPTION AT MANY LEVELS**

# TOURISM AND TRAVEL ALSO CONTINUES TO EVOLVE

## **FROM**

- 1. *Passive, observing***
- 2. *Vacation happens to them***
- 3. *Breadth: Checklist/ Top 10***
- 4. *Standardized***
- 5. *Product & Experience***
- 6. *Consume***

## **TO**

- 1. *Active, participating & creating***
- 2. *Engage & challenge***
- 3. *Depth: Select, immersive***
- 4. *Personalized***
- 5. *Experience & Transformation***
- 6. *Give Back, Positive Impact***



**WE ALSO HAVE SOME BIG CHALLENGES – RESPONSIBLE  
MANAGEMENT OF THE ENVIRONMENT IS BECOMING CRITICAL**

**AL GORE'S  
FILM – AN  
INCONVENIENT  
TRUTH HAS  
HERALDED  
A NEW ERA OF  
ENVIRONMENTAL  
CONCERN,  
AWARENESS  
AND  
RESPONSIVENESS**





**Enemies in  
the Hinterland**

The battle beyond Baghdad

**Who Killed  
Pakistan  
Coach Bob  
Woolmer?**

**Paradise Lost:  
The Tragedy  
of Fiji's  
Squatters**



# TIME

SPECIAL DOUBLE ISSUE



## The Global Warming Survival Guide

51 Things You Can Do to Make a Difference



**MAKING A  
DIFFERENCE TO  
THE  
ENVIRONMENT  
IS  
BECOMING  
EVERYONE'S  
BUSINESS**

**– HOW ARE  
WE  
ADDRESSING  
IT IN  
THE COACH  
TOURISM  
SPHERE**

# ON ANOTHER LEVEL THE TRADITIONAL TOURISM MARKETING MODEL IS BEING DRASTICALLY RE-SHAPED!

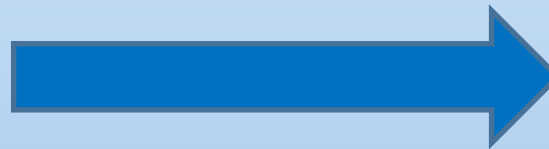
**Product**

**Position**

**Price**

**Promote**

**Place**



**Customers**

**Connections**

**Conversations**

**Content**

**Community**



# DIFFERENTIATION AND COMPETITIVE POSITIONING IS BECOMING INCREASINGLY IMPORTANT – AND CHALLENGING!



**“If you want to be indispensable, then you had better be different”  
Coco Chanel**

# THERE IS GROWING INTERNATIONAL INTEREST IN RESPONSIBLE, LOCAL TRAVEL



**VERY LOCAL TRIP**  
TRAVELLING.REINVENTED

October is...

## LOCAL TRAVEL MONTH!

Use #TravelLocal on Twitter & Instagram to share your own Local Travel tips, photos and adventures.



EscapeMaker.com's

### LOCAL FOOD & TRAVEL EXPO

wine tasting  
food samples  
local day trips  
eco workshops  
50+ travel prizes  
weekend getaways

**Saturday April 14th 12pm-5pm**

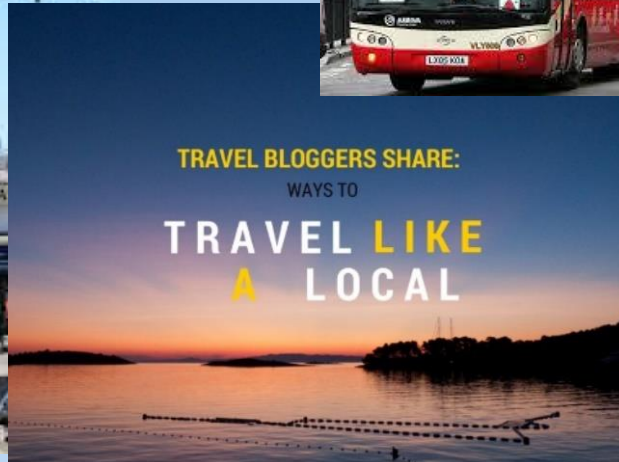
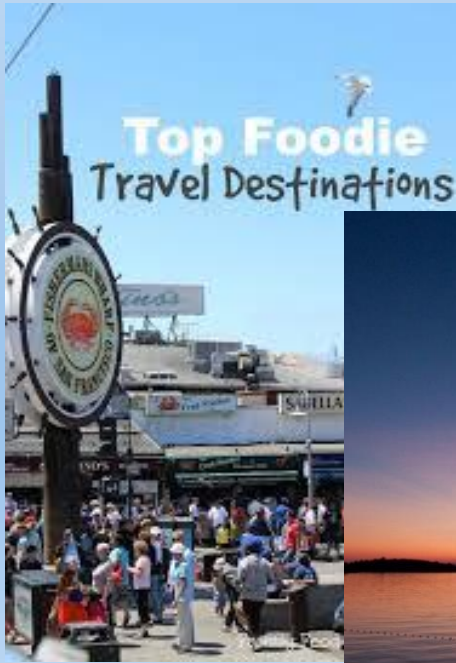
1 Hanson Pl. Brooklyn, NY

MADE IN BROOKLYN MARKETPLACE

buy tickets online at: [escapemaker.com/travelexpo](http://escapemaker.com/travelexpo)

zipcar. AMTRAK

Brooklyn Cabot Vermont



## TRAVEL LIKE A LOCAL

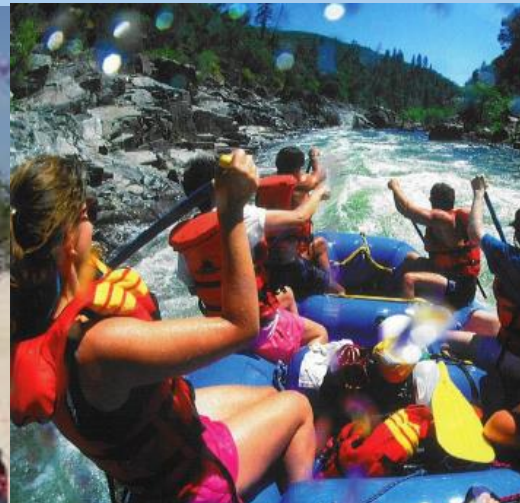
innovative travel app with a philanthropic twist.



**CONSUMERS ARE INCREASINGLY SHIFTING FROM “THINGS” TO  
QUALITY “EXPERIENCES” –  
A MAJOR OPPORTUNITY FOR COACH OPERATORS!**

**“Today consumers increasingly desire neither goods nor services, but sensation-filled experiences that engage them in a personal and memorable way.”**

**- James H. Gilmore, The Experience Economy**



# LEADING TOURISM STAKEHOLDERS ARE INCREASINGLY FOCUSING ON BALANCING THE BOULDERS, ROCKS AND PEBBLES OF THE VISITOR EXPERIENCE

## BOULDERS

Your tourism coach hardware and infrastructure



## ROCKS

The complementary and enhancing experiences on the coach



## PEBBLES

The 'small things' playing a critical and supporting role - very important for local and authentic experiences – surprising and delighting at the "touch-points"



# A KEY CHALLENGE FOR THE COACH INDUSTRY – HOW DO WE CREATE REMARKABLE AND MEMORABLE TOURISM COACH EXPERIENCES **(WE HAVE A CAPTIVE AUDIENCE):**

*Excite?*

*Engage?*

*Entertain?*

*Enlighten?*

*Educate?*



# TOURISM EXPERIENCES ARE INCREASINGLY CONNECTED THROUGH INNOVATIVE THEMATIC AND SPECIAL INTEREST TOURISM ROUTES



**BDR AZ** FEB 22-25, 2017

**BACKCOUNTRY DISCOVERY ROUTE**

WINTER TOUR

HOUSEOFMOTORRAD.COM  
720.466.0047

# THE TREND IS ALSO INCREASINGLY TOWARDS SPECIAL INTEREST AND NICHE MARKETS AND ROUTES

Casino/  
gaming

Dark  
tourism

Weddings  
and  
honeymoons

Fishing  
tourism

Cycling  
tourism

Golf tourism

Culinary  
tourism

Health/  
wellness  
tourism

Ecotourism

Kayaking  
tourism

Agritourism

Industrial  
tourism



Adventure  
Travel

Bird  
watching

Religious  
tourism

Sports  
tourism

MICE  
tourism

Volunteer  
tourism

Diving  
tourism

Cruise  
Travel

Heritage/  
historic  
tourism

Cultural  
tourism

Wildlife  
tourism

Sailing  
tourism

# MILLENNIALS ARE BECOMING MAJOR!

1.8 Billion out of 7 billion people worldwide belong to the Millennial generation (age 18-34)

- Currently one in every three employees is a Millennial
- **By 2025 they will become 75% of the global workforce**
- They are diverse, connected, technologically savvy and activists for many



98% of Millennials own and use a Smartphone on a daily basis

**MILLENNIALS ARE:**

- Leading the development of the shared economy
- **Connecting with destinations on a much deeper level**
- Increasingly connected at every step of their journey

# EVERY STAGE OF THE TRAVEL EXPERIENCE AND JOURNEY IS INCREASINGLY BEING DISRUPTED AND DOMINATED BY TECHNOLOGY AND THE INTERNET

Dreaming

Planning

Booking

Experiencing

Sharing



# AN EXAMPLE HOW TECHNOLOGY IS EXPONENTIALLY IMPACTING CONSUMER BEHAVIOUR – IN EIGHT YEARS!

2005



2013



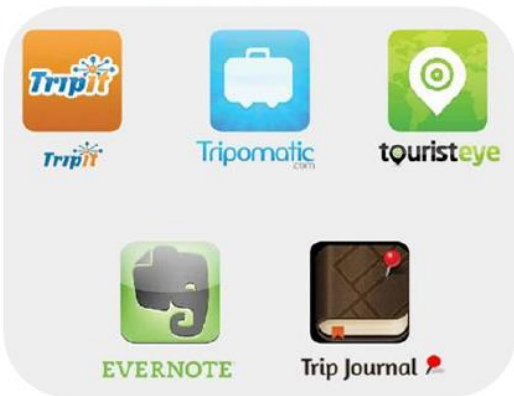


# WE NOW HAVE APPS FOR EVERY STAGE OF THE TOURIST JOURNEY!



## Pre-travel

### Travel planners



### Flight search



### Accommodation search



## On travel

### Location guides and information



### Local transport finder



### Location finder



### Recommendation and discovery



### Communication



# MOBILE AND WIRELESS IS THE NEW NORM

More than three billion people will have mobile internet access



1.8 Billion photos uploaded and shared per day (Snapchat, WhatsApp, Facebook (300M) Instagram, Flickr, etc.)

86% of time on mobile spent in apps – trend is to single purpose apps (slimmer, faster)



99% of guests bring at least one device per trip. Forty percent bring at least three devices

1 in 4 Hotel guests would opt to bring their smartphone on a trip over their SPOUSE!

4.8 Billion people own a mobile phone while 4.1 billion own a toothbrush

# A KEY CURRENT CHALLENGE: UNDERSTANDING AND RESPONDING TO THE HYPER CONNECTED TRAVELLER

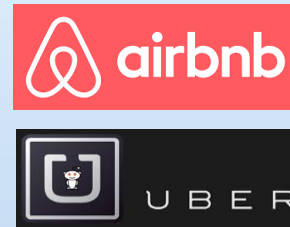
**HYPER CONNECTED TRAVELLERS SPEND MORE THAN 50% OF THEIR ONLINE TIME LOOKING AT CONTENT!**

- **27, 000, 000 PIECES OF CONTENT ARE SHARED EACH DAY!**
- **CONTENT IS THEREFORE BECOMING A CRITICAL SUCCESS FACTOR!**



# ANOTHER TREND: THE SHARED ECONOMY IS ALSO GROWING BY LEAPS AND BOUNDS

**Accommodation (Airbnb) and transport (Uber) stakeholders have been championing this trend, which is also starting to take shape with regard to tours, restaurants and activities**



**Airbnb, founded in 2008, currently has:**

- More than 3 million listings worldwide
- In more than 190 countries
- In more than 65, 000 cities and towns
- Accommodating more than 150 million guests



# WHAT IS THE SHARING ECONOMY?

“An economic model based on shared underutilized assets from spaces to skills to stuff for monetary or non-monetary benefits”

The image displays a grid of logos for various sharing economy companies, categorized by industry. The categories and their associated logos are as follows:

- Budget Aggregator:** Red Doorz, ZENROOMS, OYO.
- Furnished Rental Operator:** twelve SPRINGS, FLATBOOK.
- Corporate Housing Operator:** WW stay, RESI.
- Concierge:** City Co Pilot, EASYGUESTS.
- Glamping:** COLLECTIVE, getaway.
- Home Sharing:** couchsurfing, LOVE HOME SWAP.
- GDS:** BookingPal, LeisureLink, RENTALS UNITED, VacayStay CONNECT.
- Meta Search:** tripping, hometogo, holidu, allTheRooms.
- Property Management System:** LiveRez.com, STREAMLINE, ESCAPIA, Kigo.
- Tech-Enabled Vacation Rental Management:** Pillow, myvrhost, SENSTAY, voyajoy, evolve, TurnKey, HostWise, onefinestay, vacasa, OASIS COLLECTIONS, BNB SITTER, Guesty.
- Prop Manager Marketplace:** rented.
- Corp. Housing Marketplace:** Home suite.
- Pricing:** Wheelhouse, EVERBOOKED, SMART HOST, BeyondPricing.
- Vacation Rental Marketplace:** HomeAway, VRBO, airbnb, vaycayhero, FLIPKEY by tripadvisor, OneRoofTop, RedAwning, villas.com, roomorama.
- Vacation Rental Insurance:** SafelyStay.

# EU GUIDELINES FOR THE COLLABORATIVE (SHARING) ECONOMY

- The collaborative economy **creates new opportunities** for services providers, innovative entrepreneurs and existing companies.
- It leads to **greater choice for consumers**, and often **lower prices** in the market.
- It can also contribute to **increasing economic, social and environmental value** of idle assets and resources, and **increasing employment** through more flexible job schedules.

## A WARNING

**In some cases, the emergence of new business models impacts existing markets, creating tensions with existing goods and services providers. In part this stems from uncertainty relating to applicable regulation, e.g. on licensing, consumer protection, taxation, social security and employment models**



Source: Manalis, 2017



# YOUR “SHARING ECONOMY CHALLENGE” IN THE TOURISM COACH INDUSTRY

- *Get the full picture: Understand how the sharing economy works/can work in the coach industry*
- ***Embrace it with caution***
- *Build partnerships with key stakeholders (e.g. Government, Residents, Travel sector, etc.)*
- *Learn from other destinations, but*  
***DO WHAT IS RIGHT FOR YOUR SECTOR!***





# A CULTURE OF CONTINUOUS INNOVATION AND “EXPERIENCE REJUVENATION” IS INCREASINGLY BEING ADOPTED BY TOURISM STAKEHOLDERS



# ROAD TRANSPORT IN SOME INSTANCES IS AT THE FOREFRONT OF INNOVATION (WE DO NOT HAVE TO RE-INVENT THE WHEEL IN SA)

- New business models and digital platforms
- Electro-mobility and alternative propulsion
- Connectivity
- Automation
- Digitalisation is revolutionizing mobility





**THE CURRENT IRU PROJECT  
PROVIDES MANY KEY INSIGHTS  
(VISION 2030 FOR  
BUSSES AND COACHES)**



**THE PROJECT FOCUSSES ON:**

- **Main trends affecting mobility and bus and coach**
- **Developing scenarios for the main markets (Bus Tourism, Urban Transport and Intercity Bus Lines)**
- **Proposal for a Vision 2030 for Buses & Coaches**
- **Global consultation (South African stakeholders very welcome!)**
- **Finalizing study in June 2017**

**Contact**

**Oleg Kamberski,  
Head, Passenger Transport,  
IRU**

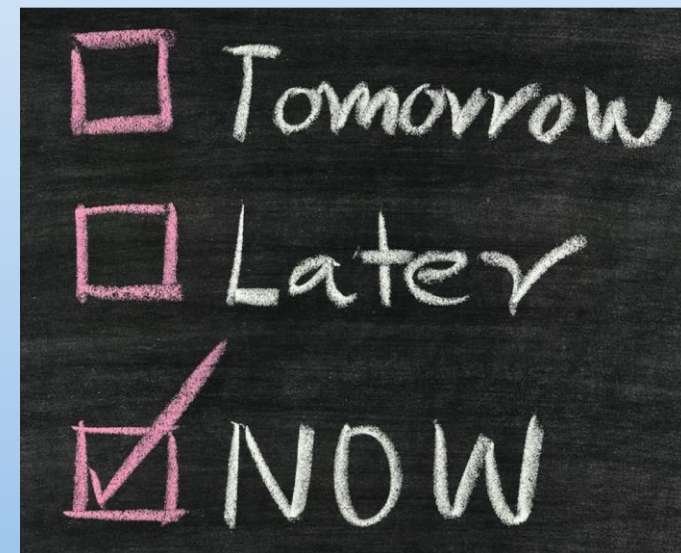
**Email address:**

**[oleg.Kamberski@iru.org](mailto:oleg.Kamberski@iru.org)**

**Website: [www.iru](http://www.iru).**

# MAIN MEGATRENDS BEING CONSIDERED IN THE IRU “VISION 2030 FOR BUSES AND COACHES” STUDY

- *The transformation towards a ‘Smart’ society*
- ***The movement towards a ‘Zero impact’ society***
- *Connected society: connectivity and convergence (with early adopters)*
- ***Future energy sources***
- *The transformation of mobility*
- ***Economic trends***
- *Socio-demographic evolutions*
- ***Future legislation and legal trends***
- *Urbanisation*
- ***Infrastructural developments***
- *Health, wellness and wellbeing*
- ***New and developing business models***

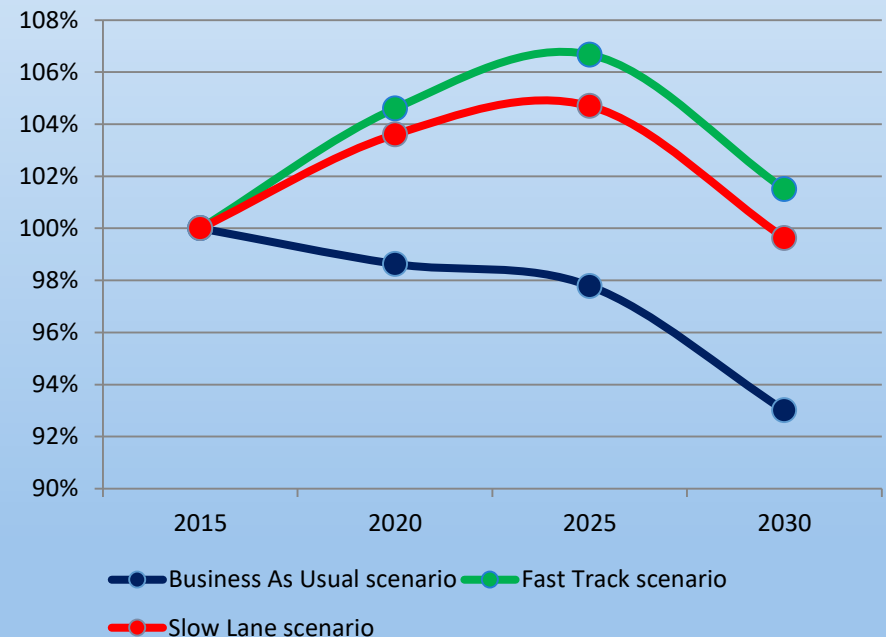


# EXPECTED FUTURE DEVELOPMENTS: BUS/COACH TOURISM?

- **Urbanisation and demography** – *different in developed and developing economies*
- **Smart and zero impact society** – *environment, safety, security / automation, electro-mobility*
- **Transformation of mobility** – *new business models, sharing economy models, Mobility-as-a-Service*



Number of passengers per year



# SOME LONGER-TERM FOOD FOR THOUGHT FROM THE IRU FOR COACH TOURISM:

- Ensure a **regulatory framework** that promotes bus tourism and sustainably manages a system of national permits
- Provide **appropriate fiscal incentives** and enabling environment to ensure a modern coach tourism fleet
- Develop and modernize **appropriate coach tourism infrastructure**
- Create a **conducive enabling environment for the private sector to invest in bus tourism**
- Provide **dedicated training** for drivers (and managers)
- Consider international **IRU Star Rating for Coaches**



# SPECIFIC FACTORS IMPACTING ON FUTURE SCENARIOS IN SOUTH AFRICA

- The political scenario
- Enabling infrastructure
- Urbanisation
- Congestion
- Motorisation
- Energy
- New technologies
- Legislation and incentivisation of public transport



- **When these trends will be most active:**
  - **Until 2020?**
  - **2020-2025?**
  - **2025-2030?**
  - **After 2030?**



***AN OPPORTUNITY EXISTS TO ENSURE THAT  
THE COACH TOURISM INDUSTRY  
IS STRATEGICALLY AND COMPREHENSIVELY  
ADDRESSED IN THE  
NEW NATIONAL TOURISM SECTOR STRATEGY (NTSS)***

***DRAFT PUBLISHED IN  
GOVERNMENT GAZETTE OF  
5 MAY (PAGES 53 – 97)***

- SUBMISSION OF  
REPRESENTATION AND  
COMMENTS UNTIL  
- 28 JULY 2017***

***A reference  
to coaches  
(page 26)***





# SOME FINAL THOUGHTS FOR TAKING COACH TOURISM IN SOUTH AFRICA TO THE NEXT LEVEL!

**Take time to focus on the future.**  
Identify the key trends and strategically respond



**Challenge current assumptions and practices – be innovative and resourceful (think outside the box?)**

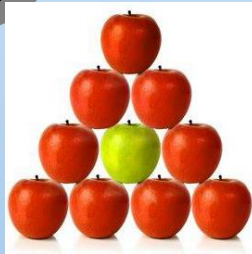
**Embrace disruptive tourism and marketing opportunities**



**Adopt an environmentally and socially responsive focus**

# SOME FINAL THOUGHTS FOR SUSTAINABLE COMPETITIVE ADVANTAGE (CONT.)

**Leverage  
appropriate  
technology and  
digital tools**

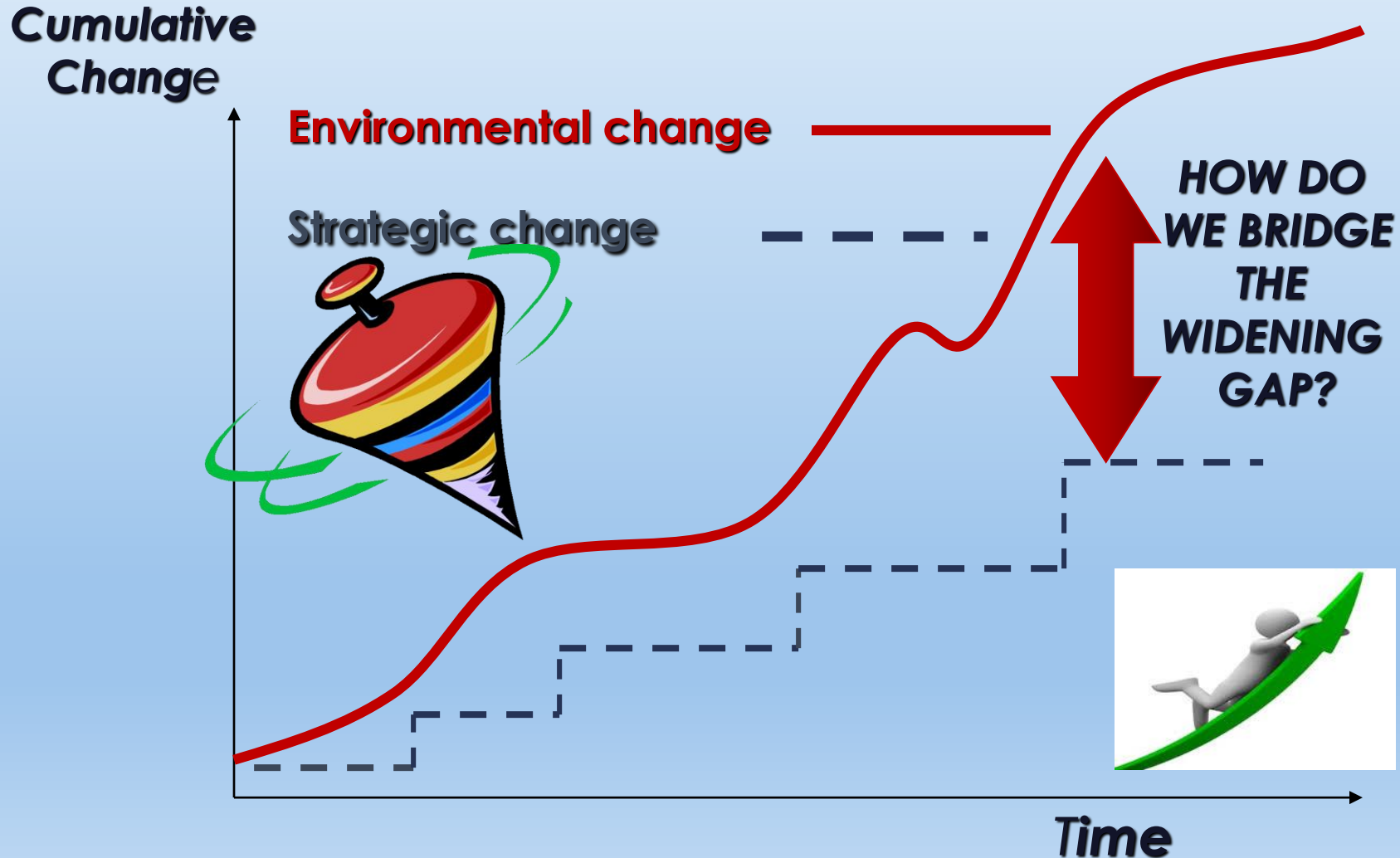


**Think customers/  
experiences – focus on  
“complete” visitor  
satisfaction at every  
“touch point” of the  
tourist coach journey**

**Explore  
collaborative  
opportunities  
(co-optition)**



**THIS BRINGS US BACK TO THE CHALLENGE WE POSED EARLIER:  
HOW DO WE RESPOND TO ALL THESE CHANGES TO AVOID  
STRATEGIC DRIFT AND ENSURE SUSTAINABLE COMPETITIVENESS?**





**We can start  
by asking  
some key  
questions?**



**Question:**  
**How are we in the coach  
tourism industry  
strategically responding  
to the challenges and  
opportunities posed by  
the changing tourism  
environment?**



# THE PAST VERSUS THE FUTURE?

**Are we developing our tourism plans and strategies in the coach tourism industry primarily based on past and present perspectives and experiences?**

**OR**

**Are we using the key trends and anticipated future scenarios as our point of departure for our plans and strategies?**



# SOME FINAL FOOD FOR THOUGHT!

## POSSIBLE FUTURE

### CRITICAL SUCCESS FACTORS FOR COACH TOURISM

1. *The provision of relevant, reliable, timely and accessible statistics and information for pro-active management and marketing (To manage our future we need to manage information!)*
2. *Providing a conducive policy and legislative enabling environment for the couch industry to competitively and sustainable operate and grow*
3. *Ensuring a positive and responsible image among all key stakeholder groups (policy decision-makers, customers, society at large, etc.)*
4. *Pro-active marketing of the economic, environmental and safety features and benefits of tourism coaches as a key link in the tourism value chain.*
5. *Providing remarkable tourism coach experiences and striving to delight the customer at every touch point in the coach tourism experience*



# SOME CRITICAL SUCCESS FACTORS FOR COACH TOURISM (Continued)

6. Embracing appropriate new technologies in every facet of the coach tourism sphere
7. Adopting an innovative and future-orientated approach in all spheres of business
8. Seamlessly linking to the other members of the tourism value chain to provide remarkable experiences at every touch point.
9. Avoiding “analysis and planning paralysis” and having a strong strategic implementation focus
10. Adopting a responsible and sustainable approach in all spheres of the coach industry





# IT IS INCREASINGLY IMPORTANT TO “STOP AND SMELL THE ROSES” AND ASK AND ANSWER KEY QUESTIONS

*Where are we now  
in the tourism  
coach  
industry?*

*How do we  
know if we  
got there?*



*Where would we  
like to be?*

*How do we  
make sure we  
get there?*

*How do we get  
there?*

# POSSIBLY WE NEED A STRATEGIC THINK TANK TO DO THREE THINGS (IF YOU HAVE NOT DONE IT ALREADY!):

1. Identify the “big-five” or “top-ten” key drivers of change that could impact on the tourism coach industry in South Africa (Adopting the 20/80 principle)
2. Identify the key potential strategic implications of these drivers of change on the tourism coach industry
3. Agree on a shared future vision and the key strategic and practical responses/actions to these drivers of change



- **THERE IS GREAT COLLECTIVE KNOWLEDGE IN THIS ROOM THAT CAN BE HARNESSSED!**
- **REMEMBER: “NOT ONE OF US IS AS GOOD AS ALL OF US” AND “EVERY ONE OF US CAN MAKE A DIFFERENCE”**



# MY FINAL QUESTION?

To borrow some words from Stephen Covey: are we still chopping wood in the right forest, with the right tools in the right ways and, of course, is it in a sustainable manner?



One of our key challenges is to ask and answer the right questions



And to check the warning lights on a regular basis



# SOME FINAL FOOD FOR THOUGHT!

**“What got us to  
yesterday and today,  
might not get us to  
tomorrow”!**



# SOME MORE FINAL FOOD FOR THOUGHT!

**"The greatest danger in turbulent times is not the turbulence; it is to act with yesterday's logic."**

**Peter Drucker, Management Theorist**



**... AND VERY FINALLY!**

***“A great wind is blowing that gives either imagination or a headache”***

***- Catherine the Great***



# AND VERY, VERY FINALLY!



**WISHING YOU EVERY SUCCESS ON THIS EXCITING  
JOURNEY IN TAKING THE TOURISM COACH INDUSTRY IN  
SOUTH AFRICA TO THE NEXT LEVEL!**





Thank You!



**THAT'S ALL FROM ME  
FOR NOW!!!**



