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Determining the Critical Factors of the Tourism Value Chain: An Importance-Performance Analysis

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Abstract

The value chain is a chain of activities that a firm operating in a specific industry performs in order to present a valuable product or service for the market. To manage the tourism product as an end-to-end seamless product, a tourism value chain concept should be developed. Despite the huge performance measurement literature for the manufacturing industries, little research has been conducted for the tourism industry. Although great emphasis is given to service quality and customer satisfaction issues and their link to the business performance in the tourism industry, it is surprising not to see a customer-oriented approach in the tourism value chain. The present study tries to sweep over this limitation as its primary aim is to investigate the tourism value chain fish bone model in order to attain effective improvement in the tourism value chain. To accomplish this end, this study used an importance-performance analysis (IPA), to examine customers' perceived importance and operation of six factors that may influence the overall character and efficiency of the value chain process. The six investigated factors were: "frontier service", "tours and excursions", "tour operators", "transport related services", "accommodation service", and "other service". The IPA grids have illustrated that the tour operators and transport-related services factors fell into the concentrate here quadrant; accommodation services and tours as well as excursions in the keep up of the good work quadrant. This is in addition to other services and frontier services in the low priority quadrant. No attribute has been identified in the possible overkill quadrant.

Keywords: Value chain, importance grid, value chain analysis, tourist product.

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Introduction

The value chain is a series of activities though which a product/service must pass until it serves its final purpose of solving a customer need. In each phase of the value chain the product/service gains some value. If a phase is malfunctioning the chain will break down and the mission of generating value for the customer will not be accomplished.[1] Value chain analysis plays a key role in understanding the need and scope for systemic competitiveness. The analysis and identification of core competencies will lead the firm to outsource those functions where it has no distinctive competencies. Mapping the flow of inputs – goods and services – in the production chain allows each firm to determine who else's behavior plays an important role in its success. And so, in those instances where the firm does not internalize much or most of the value string in its own operations, its own efforts to advance and achieve efficiency will be too little affected. The same challenge is true for national or regional economic management; upgrading the performance of individual firms in a region may have little impact if they are imbedded in a sea of inefficiency.[2] Moreover, value chain addresses the nature and determinants of competitiveness, and constructs a particular contribution in raising the masses from the individual firm to the group of interconnected firms.[3] In today's global economy, tourism presents an important economic activity for both developed and developing economies. The study of tourism as a discipline is relatively new when compared to other industrial disciplines such as manufacturing.[3] As a consequence, the tourism industry is not an exception from the value chain application.

It appears that the demand for tourism is met by the concentrated marketing efforts of a broad diversity of tourist services. The tourism product carries both the characteristics of service product and the characteristics unique to the tourism industry, which make the tourism product different from physical goods, some of which are: intangibility, perishability, inseparability, and interdependency.[3] Broadly speaking, a service product or tourism cannot be divided into production and consumption phases in general. The production and consumption of service are inseparable. Customers have direct experience of the production of the service and they are an integral part of the service process[4].

Servicing visitor needs require a commitment to strategic issues from a broad community of stakeholders impacting upon a destination. The broader this community is, the greater the possibility of benefits spreading throughout the entire community and its stakeholder organizations. The challenge for destination managers lies in bringing together, and keeping together, representation from those communities and stakeholders. Not only do these representatives need to be able to think in a strategic fashion, they also need to be able to deliver in an integrated and cohesive manner. An approach such as this can be achieved by utilizing a tool such as the 'Tourism Value Chain' which is invaluable in helping both businesses and

organizations to visualize the complete visitor 'journey'. The Tourism Value Chain concentrates on meeting and exceeding visitor expectations of the 'internal' quality of a destination. By this we mean those aspects of a destination that involve everything from pre-visit image and marketing right through to after sales care and commitment.

The tourism value chain analysis examines the share of tourism expenditure spent on different tourist services and helps us understand the share of benefits from tourism reaching the local economy and different groups of people.[5] Meanwhile, the high level of interdependence in the tourism industry suggests that various organizations need to work together as a value chain, to add value and deliver product and/or services to the customer. The tourism industry seems to lack a customer-oriented approach in the end-to-end value chain.[6] Moreover, by focusing on all links in the chain (not just on production) and on all activities in each link (for example, the physical transformation of materials in the production link) it becomes clearer which activities are subject to increasing returns, and which are subject to declining returns.[7]

Accordingly, by being able to make these distinctions regarding the nature of returns throughout the various links in the chain, policy makers are hence assisted in formulating appropriate policies and making necessary choices. These may be serving to protect particularly threatened links (e.g. Poor informal operators) and/or facilitate upgrading of other links in order to generate greater returns.[8] Besides value chain impacts of increasing the overall customer satisfaction, the framework of the value chain can be a useful tool when measuring the effectiveness of the value chain via controlling the costs, sales and other variables that affect the performance of tourism ventures. Measurement of both customer and internal related metrics with a systematic approach in a value chain measurement framework could expose the trouble areas that need to be amended. Hence, it may give the managers a greater opportunity to significantly improve its customer satisfaction level and to make its operations efficiently.[7]

Briefly, using the value chain performance measurement thinking, grounded in a systems approach, provides the tourism industry with the opportunity to gain a step change that can enhance the efficient utilization of resources and the effectiveness of properties in terms of client satisfaction, and thus repeat business.[7] However, there are limited numbers of studies dealing with issues related to value chain in the tourism sector and/or looking at the value chain from the customer perspective. In other words, there is little customer-oriented approach in the end-to-end value chain. The customers see the tourism product as a seamless product and that requires to be handled from the customer's point of view so as to measure the tourism value chain effectively.[8] The present paper attempts to overcome this limitation as its main purpose is to investigate the current situation of the tourism value chain and to provide an overview of the performance of tourism value chain. To achieve the goal of the paper, the researchers applied the performance grid analysis to create the fish bone model for tourism value chain in order to attain effective improvement in the tourism value chain. The creation will be through evaluating the tourists' importance and performance of factors within the tourism value chain during tourist experiences.

Literature Review

Overview of value chain

Although the concept of Value Chain has existed for twenty years, it is still unclear. It has been suggested that the third generation supply chain is based on customer intimacy and is fully synchronized.[9] The concept of value chain management emerged in the mid 1980s, mainly fostered by the work of Michael Porter through his publication 'competitive advantage, creating and sustaining superior performance'. Originally, Porter identified 'value' as being the amount consumers are willing to pay for a product or service. Generally speaking, value added is a measurement that is related to a production process taken as a whole, that is, a combination of inputs, capital goods, labour and technology, in order to obtain a combination of outputs. Two alternative views of value added as it relates to tourism can be identified as (tourism satellite account, 2001[10]): most simply, the value added of the tourism industries can be estimated as the sum of the value added of each tourism characteristic industry. Alternatively, a direct link between the demand for tourism goods and services on one hand and their supply on another can be determined, and value added for a certain level of visitor consumption can be estimated. In Porter's view the 'value chain' comprises "generic value adding activities" a company can undertake to provide value to the consumer.[9]

In today's globalised economy with many stakeholders involved, the main objective in 'value chains' is "on the benefits that accrue to customers, the interdependent processes that generate value, and the resulting demand and funds flows that are created".[9] Thus, efficient value chain management generates profit for those stakeholders involved (however, not evenly distributed). Smith[11] shed light on value chain as a business management concept first articulated by renowned management guru, Michael Porter. It refers to primary and subsidiary business activities that add value to materials and products and it helps companies develop comparative advantage. The concept has also been extended across supply chains and organizations, creating interconnected systems of delivering products and services termed by Porter as 'value systems' encompassing all the parties along the chains from the 'suppliers' suppliers and the buyers' buyers'.[3] The value chain exists in parallel with the supply chain and refers to the flow of revenue from the end consumer of any product and service, which provides the revenue stream for each stage of the supply chain. Bakerand Crompton[4] defined the value chain as a template that firms can use to understand their cost position, to identify the multiple means that might be utilized to facilitate

implementation of their strategy. The use of this template allows a firm to identify the parts of its operation that create value and those that do not. The value chain is segmented into primary activities and support activities.[12]

The *value chain*, as shown in figure 1, describes the full range of activities which are required to bring a product or service from conception, through the different phases of production (involving a combination of physical transformation and the input of various producer services), delivery to final consumers, and final disposal after use.[13]

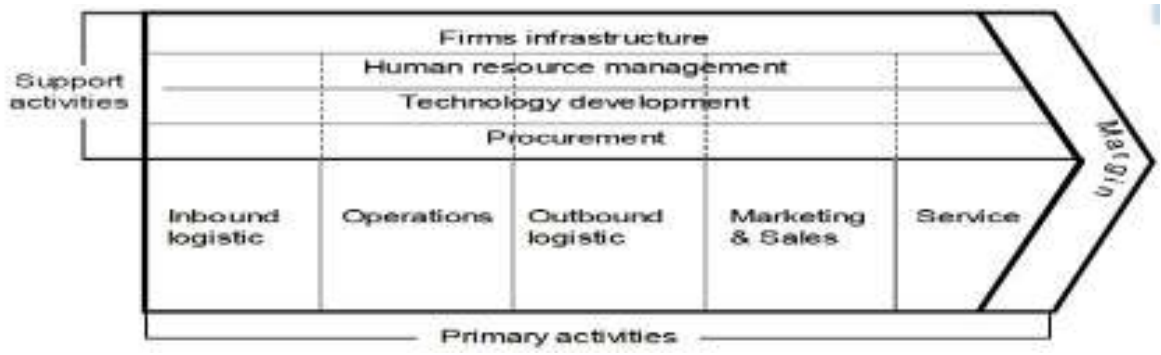

Figure (1): Generic Value Chain (Cox, 1999)[14]

According to the above figure, Cox distinguishes between primary activities and support activities. The primary activities are directly concerned with the creation or delivery of a product or service. They can be grouped into five main areas: inbound logistics, operations, outbound logistics, marketing and sales, and service. Each of these primary activities is linked to support activities which help to improve their effectiveness or efficiency. There are four main areas of support activities: procurement, technology development (including R&D), human resource management, and infrastructure (systems for planning, finance, quality, information management etc.).[15]

Value chain in tourism

The key difference in the value chain concepts of the tourism industry, when compared to the manufacturing industry, is that the customer experiences the chain at first hand as it is the customer that passes from one process to another – rather than the goods in manufacturing – along the value chain. This view will help to make the managers, who use the tourism value chain framework, know and take the necessary actions to ensure overall customer satisfaction. The reason for this is that tourists – customers – evaluate their travel experiences as a whole. That is, bad experiences in one part of the value chain (e.g. hotel), will affect not only the future business of the hotel but also the future business of the tour operator, transportation, local travel agents and other parties that are involved in the entire value chain.[16] According to (Netherlands Development Organization)[17] the main player of value chain in tourism are:

- The market actors who are the individual entrepreneurs and businesses bringing a product or service from conception to its end use and beyond. Typically, these are private-sector entities since they can provide goods and services on a market-based or commercial basis. Examples of market actors for a tourism value chain include tour operators, village based entrepreneurs who provide tourism related products/services, transportation companies, traders, tour guides, etc. For an agricultural value chain, the market actors include input suppliers, traders, processors, farmers, etc.
- The End markets who are the final buyers of the products/services. For tourism value chains, the end markets are typically national and international tourists.
- Supporting products/services refers to other market actors who provide products and/or services which support the main value chain. For example, transporters, banks, accountants, extension services, designers, etc. provide key services/products such as finance, technical support, training, transportation etc. Some development organizations also refer to supporting products/services as business development services (BDS).
- Business enabling environment refers to entities involved in establishing and upholding regulations, policies, guidelines and the like (both formal and informal) which impact the market actors in the value chain. Typically, this includes government agencies and trade associations which establish and monitor compliance with various regulations. Associations and government agencies may be local, district, regional, national and/or international.

The tourism industry consists of various players and tourism demand is met by the joint efforts of these players. However, it seems that there is no attempt in the tourism management literature proposing frameworks or models, which can assist the tourism companies, evaluate and control the overall tourism value chain.[16] The tourism value chain starts with the customer order. Customers or tourists have some alternatives when they purchase the tourism product. They can either arrange their travel plan with the help of tour operators or outbound travel agents (package travel) – that has the advantage of taking professional advice on the whole holiday package without any thinking; or arrange it themselves (individual travel), which

allows them to be flexible in their travel experience. Incoming travel agents can be used to make transfer arrangements from/to the airport (or train station, harbour, etc.) to/from the hotel and for daily excursions and other activities held at the destination. Transportation (airline, train, etc.) between home and destination is also an important part of the tourism value chain.

For tourism value chain, the package travel model includes the alternatives of either taking the whole holiday package, which is the most popular one, or any part of the travel (e.g. airline ticket only, hotel reservation, car rental at destination or a combination of both). On the other hand, consumers can individually organize each step of their travel by themselves – that means they buy the airline ticket, hotel stay, car rental, sightseeing tour or any other activities individually from the companies directly without using any intermediary. As a result, The use of IT on the indirect travel mode is increasing and many authors like Nissen (2001),[18] Law et al. (2004),[19] Meyronin (2004),[20] Sigala (2003),[21] Smith (2004)[22] and others have discussed the impact of IT usage on the tourism distribution channel especially since the late 1990s.

As mentioned above, to manage the tourism product as an end-to-end seamless product, a tourism value chain concept can be developed, as in Figure 2. At the win order stage, consumers purchase the product among the pre-determined travel packets either as a whole or part(s) of it from the travel organizer. A tour operator or outbound travel agent makes the necessary arrangements on behalf of the consumer. Pre-delivery support consists of activities like handling visa requirements, giving the detailed information about the destination and any other things that the consumer may need before departure. The tour operator or outbound travel agent operates at this stage. The delivery stage is where the customers consume their product. The tourism suppliers deliver their products to the consumers at this stage. Post delivery support is where the customer satisfaction is measured and the necessary corrective action taken to make sure that the tourism value chain is managed in a continuous manner.[16]

Figure (2): Value chain in tourism (Yilmaz and Bititci , 2006)[16]

Kaukal et al.,[23] noted that a typical tourism value chain consists of four components: tourism supplier, tour operator, travel agent and customer, and they are in a single link chain. Yilmaz and Bititci[16] develop a tourism value chain to manage the tourism product as an end-to-end seamless product.[24] It is noticed that the tourism industry has been analysed in a holistic manner through distribution channel perspective by many authors.[25,26,27] Poon adapt Porter's value chain concept to the tourism industry.[28]

Value chain analysis:

Value chain analysis describes the activities within and around an organization, and relates them to an analysis of the competitive strength of the organization. Therefore, it evaluates which value each particular activity adds to the organizations products or services. This idea was built upon the insight that an organization is more than a random compilation of machinery, equipment, people and money. Only if these things are arranged into systems and systematic activates it will become possible to produce something for which customers are willing to pay a price. Porter argues that the ability to perform particular activities and to manage the linkages between these activities is a source of competitive advantage.[15] According to the Tour Operators Initiative,[8] value chain analysis overcomes a number of important weaknesses of traditional sectorial analysis which tends to be static and suffers from the weakness of its own bounded parameters. For in restricting itself to sectorial analysis,

it struggles to deal with dynamic linkages between productive activities that go beyond that particular sector, whether they are of an inter-sectorial nature or between formal and informal sector activities.

Furthermore, value chain analysis is particularly useful for new producers – including poor producers and poor countries – who are trying to enter global markets in a manner which would provide for sustainable income growth. Finally value chain analysis is also useful as an analytical tool in understanding the policy environment which provides for the efficient allocation of resources within the domestic economy, notwithstanding its primary use thus far as an analytic tool for understanding the way in which firms and countries participate in the global economy.[8]

There are three main sets of reasons why value chain analysis is important in this era of rapid globalisation. First, the growing division of labour and the global dispersion of the production of components, systemic competitiveness has become increasingly important. Secondly, efficiency in production is only a necessary condition for successfully penetrating global markets .finally; entry into global markets which allows for sustained income growth – that is, making the best of globalisation - requires an understanding of dynamic factors within the whole value chain.[8] According to Netherlands Development Organisation,[17] it is essential to understand the objectives of carrying out this analysis, these objectives are briefed as follow:

- Identify and understand the primary market actors in the value chain, their roles and relationships (how they work together)
- Identify sales markets, unmet demand and competitors
- Identify supply channels and trends within the value chain
- Identify constraints and opportunities that slow down value chain growth and competitiveness.

The value chain programme design consists of selecting and analyzing an entire value chain, identifying and assessing appropriate market-based solutions and determining and prioritizing suitable facilitation activities (or interventions) for the development organization to undertake to ultimately increase economic benefits for the target population.[17] Recklies[15] explained that a typical value chain analysis can be performed in the following steps:

- Analysis of own value chain – which costs are related to every single activity
- Analysis of customer value chains – how does our product fit into their value chain
- Identification of potential cost advantages in comparison with competitors
- Identification of potential value added for the customer – how can our product add value to the customers value chain (e.g. lower costs or higher performance) – where does the customer see such potential)

Methodology

This study deployed fish bone approach, to meet the objectives of the study. A conceptual framework (suggested Fishbone diagram) was devised to identify and highlight the points to be investigated and to guide the work through the field research (See Figure 3).

The fish bone technique

The Fishbone diagram (also called the Ishikawa diagram) is a tool for identifying the root causes of quality problems. It was named after Kaoru Ishikawa, a Japanese quality control statistician, the man who pioneered the use of this chart in the 1960's .The Fishbone diagram is also an analysis tool that provides a systematic way of looking at effects and the causes that create or contribute to those effects. Because of the function of the Fishbone diagram, it may be referred to as a cause-and-effect diagram.[29] Moreover, the various fish bones are used as a way of structuring thoughts about the causal elements and each main 'bone' represents a particular category of causal elements. Once people get the hang of the creative use of the fishbone as a diagnostic tool, they are soon looking at the causal elements in greater detail and finding subsidiary factors that need investigation.[30]

These are written in as 'tiny bones', connected to main causal elements. Once a particular problem is mapped out in this way, any particular factor that seems promising for whatever reason can be looked into. A second stage in using the fishbone is to shift the emphasis from problem analysis to solution analysis. This time, the solution opportunity is entered in at the head of the fishbone as the 'effect' being studied and the diagram then becomes a set of categorized factors which potentially contribute to the solution. As before, the process is a creative one but the aim is 'breakthrough' results.[31] A fishbone diagram is perhaps the easiest tool in the family of cause-and-effect diagrams that engineers and scientists use in unearthing factors that lead to an undesirable outcome.[32] City Process Management[33] summarizes the advantages of the fishbone as follows:

- Fishbone diagrams permit a thoughtful analysis that avoids overlooking any possible root causes for a need.
- The fishbone technique is easy to implement and creates an easy-to-understand visual representation of the causes, categories of causes, and the need.

- By using a fishbone diagram, you are able to focus the group on the ″big picture″ as to possible causes or factors influencing the problem/need.
- Even after the need has been addressed, the fishbone diagram shows areas of weakness that - once exposed - can be rectified before causing more sustained difficulties.

Item Generation of fish bone diagram

To build a complete tourism value chain fish bone diagram, an extensive review of literature was conducted in the broad contexts of the tourism value chain. To identify the relevant tourism value chain attributes a list of 35 tourism value chain attributes was screened out from the review of literature in the "first stage. This list of tourism value chain attributes was then sent to three identified groups for comments. The three identified groups were: academic staff, hotel and travel agents staff, and potential tourists who were to leave Cairo Airport from April to September 2013. Members of the three groups were asked to rate each of the 35 tourism value chain attributes in terms of importance when choosing a tourist destination, on a 5-point Likert scale ranging from extremely important ' to &extremely unimportant'. After a careful screening analysis and advice from academic professionals, 28 of the 35 attributes were selected. These 28 attributes were regarded as the influential factors in tourism destination selection.

In the second stage, to increase credibility, the collected items were identified and categorized by the two researchers for six main factors named supporting frontier service, tours and excursions, tour operators, transport, accommodation and other services. For judging the reliability of the subdrivers and items classification kappa statistics was calculated to measure the agreement between the two raters.[34]

The equation for κ is: $$\kappa = \frac{\Pr(a) - \Pr(e)}{1 - \Pr(e)},$$

Where Pr (a) is the relative observed agreement among raters, and Pr (e) is the hypothetical probability of chance agreement, using the observed data to calculate the probabilities of each observer randomly saying each category. If the raters are in complete agreement then κ = 1. If there is no agreement among the raters (other than what would be expected by chance) then κ group ≤ 0.[34] The classifications of collected items is compared by an inter rater reliability analysis using the Kappa statistic was performed to determine consistency among researchers, The interrater reliability for the raters was found to be Kappa = 0.79. As a result, A total of 28 items were developed to cover six factors which drive value chain (5 items) supporting frontier service, (5 items) covering tours and excursions, (4 items) supporting tour operators, (5 items) supporting transport related service, (5 Items) supporting accommodation service, and (4 items) for other service. These items build a complete tourism value chain fish bone diagram (see figure 3).

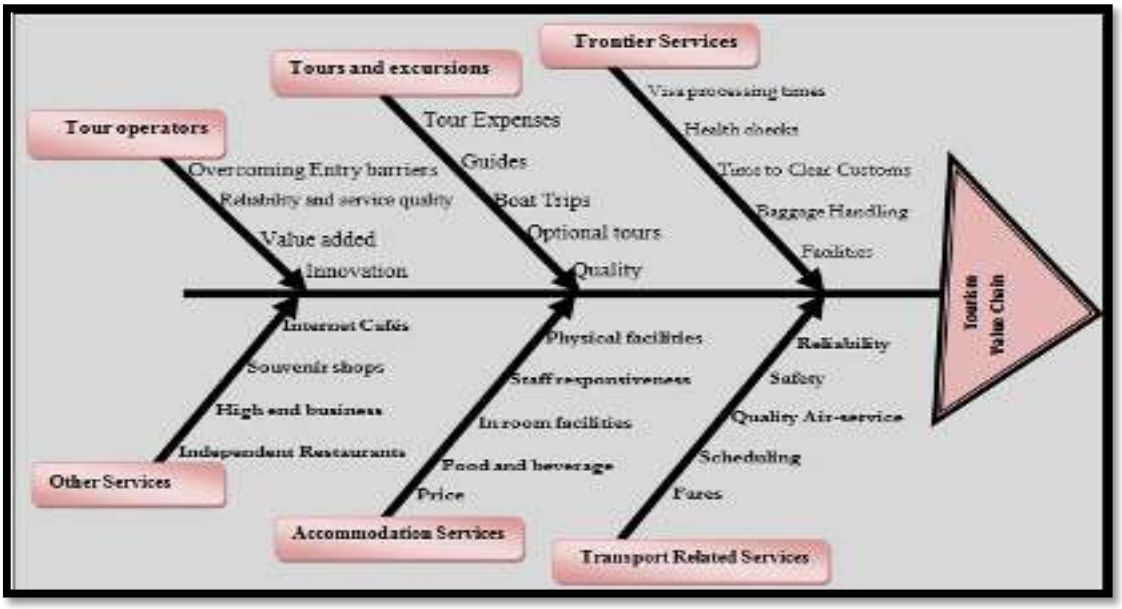

Figure (3): Tourism value chain fishbone

Data collecting

Research instrument

The proposed fishbone diagram (figure 3) was transferred into self-administrated questionnaire. To obtain the required data, this questionnaire is made up of two sections personal data and tourism value chain 28 attributes, for which travelers were asked to indicate the perceived importance of the attributes when they choose a tourist destination, and their perceptions of actual destination performance during their visit. The questionnaire was structured so that each tourism value chain attribute was rated using a 5-point Likert scale, ranging from 1, least important to 5, most important, in the importance part, and from 1, strongly disagree, to 5, strongly agree, in the Performance part. The questionnaire items were written in clear language, and then a pretest was performed on 20 tourists, and four professors specializing in tourism and hotel management. The purpose of the pre-test was to detect potential problems in questionnaire design, clarity, and wording.[35] Following this pre-test, the wording of some items was refined for subsequent formal survey.

The sampling method

The population of the study comprises individuals who had a travel experience .Since, the sample chosen in this study included mainly tourists. The survey was conducted in four significant tourist regions, i.e. Greater Cairo, South Sinai (Sharm-El Sheikh), Red Sea (Hurghada and Marsa Alam), and Luxor provinces (See Table 1). These regions were chosen as they presented the main tourist region in Egypt. Furthermore these regions offer different types of tourist products. The study surveyed a random sample of hotel customers. The questionnaires were distributed randomly to guests in 15 hotels when they checked-in at their hotels. The reception staff and the tour leaders took the responsibility of questionnaire distribution upon check-in and collection on departure or check-out. The questionnaires were distributed from October 1 to December 25, 2013.

Table (1): Elements of the actual sample

Region	No. of hotels included in the sample	Distributed questionnaires	Valid questionnaires	%
Greater Cairo	11	300	152	51%
Red Sea	4	120	51	42.5%
Sharm El-Sheikh	6	175	102	58%
Luxor	4	75	38	51%
Total	25	670	343	51%

Data analysis

In this study, descriptive statistics including simple frequencies were computed on the respondents' demographic, traveling profiles, and tourism value chain attributes. Data were analyzed using Statistical Package for Social Science (SPSS) version 17. To assess the reliability of the study factors, Cronbach's Alpha[36] was calculated to test the stability of variables retained in each factor, the reliability analysis gave alpha coefficients exceeding (.70), for all the study factors which are regarded as acceptable reliability coefficients and a good indication of construct reliability.[35] Importance-performance analysis (IPA) was then employed to compare the perceptions of customers toward the most important factors of the value chain and the performance of these factors. IPA has become a popular managerial tool that has been broadly used to identify the strengths and weaknesses of brands, products, services and retail establishments in various industries in recent years.[37,38] IPA is conducted by estimating the perceived importance and performance mean of each attribute or variable through calculated and plotted into a graphical grid. Cross-lines (vertical and horizontal lines), using the mean values of the importance and performance parts, were calculated to separate the derived factors into four identifiable quadrants (See Figure 4). The data was then presented on a grid where each factor was plotted according to its perceived importance and performance. The two-dimensional grid displayed the importance of attributes on the vertical axis from high (top) to low (bottom) and the performance of attributes on the horizontal axis from high (right) to low (left). Figure 4 illustrates the resultant graphical representation of the data that produced the four quadrants (cells).

Figure (4): Importance-Performance Analysis Grid (Modified from Chu and Choi, 2000)[39]

Results and Discussion

Of the respondents A total of 343 out of 540 travelers completed the questionnaire, representing a response rate of 63.5 percent. The majority of the respondents were male; More than half of them (56.1%) reported being married while about 70.4 percent of respondents said they do not have children under 18 living in their household. The largest age group was comprised of those who are between 35 and 54 years old (48.9%). Over 65.6 percent of the respondents reported that they completed a college degree. 18% resided in Japan, 43% in the European Union countries, followed by the USA, Australia, and New Zealand. As shown in table 2, the factor loadings of each item exceeded 0.5, and so met the threshold level recommended by Bagozzi and Yi.[40] The convergent validity of each scale's item is satisfying. Table 2 shows also the mean scores of the 6 tourism value chain factors and their retaining attributes for the tourists in relation to Importance and Performance. The data were then transferred to the IPA grid presentation in Figs 5.

Table (2): Mean ratings of importance and performance of tourism value chain factors

Tourism value chain factors	Importance		Performance		Factor Loading
	Mean[a]	Std. Dev.	Mean[b]	Std. Dev.	
Frontier Services	**2.62**	**0.17**	**2.96**	**0.25**	
Visa processing time is convenient	3.11	1.06	2.11	1.22	0.818
Health checks are available	2.5	1.05	2.4	1.39	0.743
Time to Clear Customs is convenient	3.2	1.08	3.8	1.14	0.727
Baggage Handling	2.1	1.21	3.1	1.24	0.704
Facilities	2.2	1.09	3.4	0.99	0.652
Tours and excursions	**3.36**	**0.80**	**3.38**	**0.38**	
▪ Tour Expenses are logical	3.2	1.90	4.2	1.59	0.867
▪ Guides are professionals	4.1	1.60	3.2	1.40	0.858
▪ Boat Trips have high quality	3.8	1.86	3.5	1.62	0.835
▪ Optional tours are available	4.5	1.27	4.0	1.23	0.654
▪ Tours and excursions have high quality	2.9	0.90	2.0	0.52	0.568
Tour operators	**4.87**	**0.70**	**2.62**	**1.41**	
▪ Overcoming Entry barriers is available	4.9	1.17	3.2	1.44	0.696
▪ Reliability and service quality	4.9	1.40	2.2	1.26	0.683
▪ Value added	4.8	0.75	2.8	1.50	0.670

▪ Tour operators are Innovative	4.9	1.17	2.3	1.77	0.539
Transport Related Services	**3.94**	**0.23**	**2.66**	**0.17**	
▪ Fares are proper	3.2	1.02	3.1	1.12	0.863
▪ Scheduling is appropriate	3.5	0.85	3.2	1.05	0.834
▪ Quality Air-service is high	4	1.06	3	1.22	0.654
▪ Transport Related Services are Safe	4	0.92	2	1.27	0.592
▪ Transport Related Services Reliable	3	1.01	2	1.21	0.518
Accommodation Services	**4.24**	**0.49**	**3.74**	**0.38**	
▪ Price is reasonable	4.5	1.53	3.5	1.40	0.834
▪ Food and beverage are of great variety	4.3	1.55	4.0	1.19	0.726
▪ In room facilities are of high quality	4.1	1.85	3.5	1.66	0.722
▪ Staff responsiveness is high	4.3	1.68	4.0	1.46	0.719
▪ Physical facilities are available	4	0.85	3.7	1.23	0.594
Other Services	**2.33**	**0.23**	**2**	**0.11**	
▪ Independent Restaurants are of high quality	3.5	1.20	2.5	1.09	0.825
▪ High end business is available	1	1.22	1.5	1.14	0.763
▪ Souvenir shops are reliable	3	1.27	2.8	1.12	0.734
▪ Internet Cafés are reliable	1.8	0.23	1.2	1.66	0.687

[a] Mean scale: 1 * least important to 5 * most important.

[b] Mean scale: 1 * strongly disagree to 5 * strongly agree.

X-axis represents the perception of Performance scores relaying to respondents' experience of destination (i.e Egypt) services and facilities. The Y-axis represents the relative weights of the six Importance items relating to destination value chain. The four quadrants are constructed based on the mean scores of the Importance and Performance ratings.[39] The mean Importance rating for the collective data was 3.56 and the mean Performance rating was 2.9. To complete the Importance-Performance analysis, a series of paired-samples t-tests were conducted to evaluate whether the mean performance scores differ significantly from the mean importance scores. Table 3 illustrates results that indicate that the mean importance and performance ratings of the 28 items of the tourism value chain don not differ significantly.

Table (3): Importance-performance analysis of tourism value chain factors

Tourism value chain factors	Mean of importance	Mean of performance	Gap I-P	t-value	Significance (two-tailed)
Frontier Services					
Visa processing time is convenient	3.11	2.11	1	15.382	0.004
Health checks are available	2.5	2.4	0.1	-2.315	0.000
Time to Clear Customs is convenient	3.2	3.8	-0.6	-12.816	0.000
Baggage Handling	2.1	3.1	-1	3.710	0.000
Facilities	2.2	3.4	-1.2	9.738	0.000
Tours and excursions					
▪ Tour Expenses are logical	3.2	4.2	-1	13.830	0.000
▪ Guides are professionals	4.1	3.2	0.9	12.352	0.000

▪ Boat Trips have high quality	3.8	3.5	0.3	8.936	0.000
▪ Optional tours are available	4.5	4.0	0.5	-9.936	0.021
▪ Tours and excursions have high	2.9	2.0	.9	11.341	0.000
Tour operators					
▪ Overcoming Entry barriers is	4.9	3.2	1.7	15.830	0.000
▪ Reliability and service quality	4.9	2.2	2.7	17.352	0.000
▪ Value added	4.8	2.8	2	14.936	0.000
▪ Tour operators are Innovative	4.9	2.3	2.6	-9.936	0.031
Transport Related Services					
▪ Fares are proper	3.2	3.1	0.1	2.830	0.000
▪ Scheduling is appropriate	3.5	3.2	0.3	3.710	0.000
▪ Quality Air-service is high	4	3	1	-12.816	0.000
▪ Transport Related Services are	4	2	2	11.936	0.000
▪ Transport Related Services	3	2	1	10.936	0.000
Accommodation Services					
▪ Price is reasonable	4.5	3.5	1	-12.830	0.006
▪ Food and beverage are of great	4.3	4.0	0.3	12.710	0.000
▪ In room facilities are of high	4.1	3.5	0.6	-11.815	0.000
▪ Staff responsiveness is high	4.3	4.0	0.3	9.336	0.000
▪ Physical facilities are available	4	3.7	0.3	3.738	0.000
Other Services					
▪ Independent Restaurants are of	3.5	2.5	1	5.269	0.000
▪ High end business is available	1	1.5	-0.5	3.710	0.000
▪ Souvenir shops are reliable	3	2.8	0.2	-12.816	0.007
▪ Internet Cafés are reliable	1.8	1.2	0.6	3.710	0.000

Broadly speaking, the sustainability of the value chain depends on the effectiveness of each process in the value chain and each process in the chain needs to be managed and measured as a simple system rather than a number of independent systems.[7] Based on the above fact, the researchers try to present the effectiveness of each process in the value chain .Since, Figs. 5 illustrates the results of the Importance- Performance grids as for respondents. The results clearly reveal that tour operators and Transport Related Services in the Concentrate Here quadrant, Accommodation Services and Tours and excursions in the Keep Up the Good Work quadrant, Other Services and Frontier Services in the Low Priority quadrant and no items are found in the Possible Overkill quadrant.

The following provides some meaningful insights about the quadrant' presentation.

Quadrant I - Concentrate Here quadrant- (High Importance, low Performance)

This quadrant presents the attributes which are perceived to be very important to respondents, but performance levels are fairly low. This sends a direct message that improvement efforts should concentrate here. Two factors were identified in this quadrant, these factors are “tour operators” with 4 value chain attributes i.e (overcoming entry barriers, reliability and service quality, and transport related services, value added and tour operators' innovation) and “transport” related services with 5 value chain attributes. They were: fares, scheduling, quality air-service, safe, and reliable .The results shown above suggest that special attention should be directed to the tour operators and transport related services factor.

For Tour operators, the achieved mean of importance is rating of 4.87 appear to be the top criterion in the tourism value chain, with performance mean 2.26. Tour operator is the company that acts as intermediary between tourist and tourism service provider. In other words, the important function of a tour operating company is to bridge the elements of the services

offered from the supply side of the business with the consumption side of the business. Thus, the tour operator performs the task of linking such elements together and sells the products in one piece and in a single price.[41]

This role of tour operator is being achieved due to the fact that the tourism industry is an industry offering the services which are interdependent (branches). Thus, the tour operator performs the task of linking such elements together and sells the products in one piece and in a single price.[41] However, Tour operators sub-contract 85-90% of all the services they sell and therefore they have little direct control this may explain the above results.[42] A number of respondent comment that the key factor of efficiency in the performance of the business operations of tour operators start from the availability of a prospective mix of qualifications and skills of the staff members in a company. These results are confirmed the results of Nkonoki study.[41] In order for a tour operating company to functions efficiently, it must cope with the business demands and commercial skills required. Currently, there is a high need for a broad cross-section of management, marketing, financial and technological skills for the business operations of the tour operating companies.[42] Moreover, the tour operators were out to be more creative and so that they can remain competitive in their business. According to table (2) transportation achieved 3.94 as a mean of importance. Since, transportation system of a tourist destination has an impact on the tourism experience which explains how people travel and why they choose different forms of holiday, destination, and transport.[43] Transport is important for tourism because it a) facilitates the movement of tourists between their place of origin and their destinations, and b) acts as the means of movement within a destination, thus allowing for wider dispersal of visitor movement and, as a result, maximum exposure of visitor flows to areas perhaps not otherwise possible.[44]

Regarding the performance of transportation as a value chain major factor, the results showed that this factor achieved 2.66 as a mean for performance. These results may due to the fact that transportation, tour operators and hotel, heavily reliant on each other.[7] If one fails to deliver a service it has an effect on the other one. This result is matched with the study of Yilmaz and Bititci[16] who stated that delivery can mainly be divided into three sub sectors: accommodation, transportation and incoming travel agents. The relations between these players affect the performance of the delivery stage. Therefore, the performance measures should reflect the interdependency features of the industry.[16]

It could be concluded that transportation in tourism is most often seen as just part of the tourism system which is in charge of bringing the tourists to the destinations, a means of getting around the place and leaving it once the duration of the trip is over. Page and Lumsdon [44] contend that the transportation system of a tourist destination has an impact on the tourism experience which explains how people travel and why they choose different forms of holiday, destination, and transport. The improvement in transportation modes plus low fares has increased the accessibility of areas once considered off-the-beaten-path. Access to tourism sites vary according to the nature of the site, the state of infrastructure, and the efficiency of the public transport system.[43] In the transportation sector, the main emphasis is on the airlines and their relations with the travel organizers. It is again the case that performance measurement is very immature in the transportation sector and it requires further focus on this huge industry, which suffers from heavily fixed cost structure and also the customer loyalty problems. In terms of ensuring customer satisfaction and their loyalty, the companies develop various strategies. The impacts of these strategies and the agent-airline relations need to be carefully measured and managed.[19] Such results confirm the study of Eraqi [45] who concluded that the main effect on the satisfaction of tourist about transportation factor was the weakness of the internal transport quality criterion. These results send a meaningful message to destination, in that they should concentrate on these aspects from their customers' point of views. Resources should be directed to improving and maintaining the quality of their product regarding “tour operators' activities “and “transportation related services”.

Quadrant II - Keep Up the Good Work quadrant - (High Importance, High Performance)

In this quadrant, attributes are perceived to be very important to respondents, and at the same time, the organization seems to have high levels of performance on these activities. The message here is to keep up the good work. Accommodation Services and Tours and excursions were identified in this quadrant illustrated in Figs. 5 These two factors were considered satisfactory in meeting travelers' needs. According to the results Accommodation Services was the next important factor as perceived by travellers in the tourism value chain with a mean rating of 4.24 with performance mean 3.74. The result confirms the study of Poudel who concluded that tourism, in a broad sense, is dependent on the quality and quantity of accommodation facilities available. It is a very vital factor of tourism development. Quality accommodation is a critical element of the visitor experience for both leisure and business visitors.[46] A number of visitors' comments on quality of service, cleanliness, luxury, well-trained staff, while others comment on a smile, a warm and genuine welcome and a willingness to please and serve customers is a common observation and achievable across all star ratings. Some of them detailed their satisfaction about booking service, food quality service and service efficiency and hospitality & friendliness.

However, the high satisfaction results, it is observed that the hospitality industry is dynamic in the way it provides services to its customers. If your customers would benefit from, or appreciate a new way of doing things sustainability practices in your business are one and the same thing; it's all about taking small steps that enable you to do business even better, not differently. Small changes will not only save money, improve employee relations, enhance profitability and provide

a richer experience for customers, but over time you will also improve your business's impact on the local economy, community and environment.[22] Regarding the performance and importance of "tours and excursion" as a value chain major factor ,the results showed that it was the second performance factor as perceived by travelers in the tourism value chain with a mean rating of 3.38 with importance mean 3.36.

However, it could be concluded that the important point is that in the tourism industry, many players are all linked and depend upon one another. As mentioned above, the accommodation sector, for example, relies upon the transport sector to transport guests to and from accommodation. Similarly, the transport and accommodation sectors, both rely upon the travel organizers sector to provide them with customers.[7] If one fails to deliver a service it has an effect on other sectors. This interdependence between sectors is effective in the overall service quality that the consumers perceive.[47]

Quadrant III - Low Priority quadrant - (low importance, low performance)

In this quadrant attributes with low importance and low performance were presented. Although performance levels may be low in this cell, managers should not be overly concerned since the attribute of this cell is not perceived to be very important. Limited resources should be expended on this low priority cell .In other words, This quadrant identifies those items where are performing adequately, but travelers perceive them as less important when compared with other tourism value chain attributes. The destination value chain factors were identified in this quadrant: Frontier services and other services. The results clearly revealed that "Frontier services" and "other services" are attributes of low importance and low priority. Since the mean of the importance of" Frontier services" and "other service" are (2.26) and (2.33) respectively with achieving mean (2. 96) and (2) for performance. Their poor performance is apparently not a problem, as they are relatively unimportant. Their performance should only be improved if there are some attributes in quadrant II (higher priority) and/or if the improvements are not too costly.

Although the result showed that travelers did not perceive these attributes important, this does not mean that destinations should reduce their efforts to improve such services. These results assure the study of Eraqi[45] who discussed that exploring the current ratings of customer expectations and customer perceptions of specific service attributes provides a tool for management in order to improve the service quality of the firm.

Quadrant IV- Possible Overkill quadrant- (low importance, high performance)

This cell contains attributes of low importance, but relatively high performance. Respondents are satisfied with the performance of the organizations, but managers should consider present efforts on the attributes of this cell as being over utilized. There is no any factors can be viewed as areas of performance "overkill".

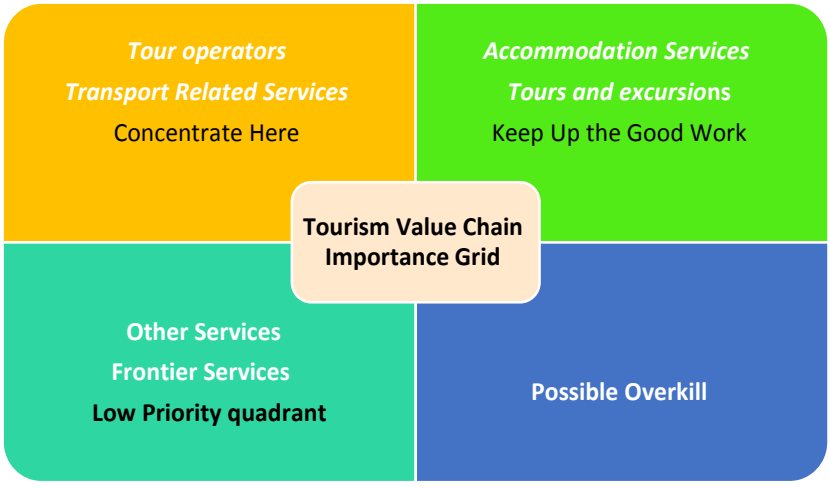

Figure (5): Tourism Value Chain Importance Grid

According to the above results, product Post-delivery is where the overall customer satisfaction is measured and necessary corrective action is taken. Besides, total value chain effectiveness in terms of the added value of each organization could be evaluated at this stage. These feedbacks, customer and internal, could be used for monitoring and managing a sustainable value chain.[19] Based on the results of the (IPA) analysis the tourism value chain fishbone was described from the results of the two quadrants which represent the high importance factors i.e (Concentrate Here quadrant and Keep Up the

Good Work quadrant).The following Fishbone diagram (Figure 6) summarize the most important tourism value chain attributes based on the results of this study.

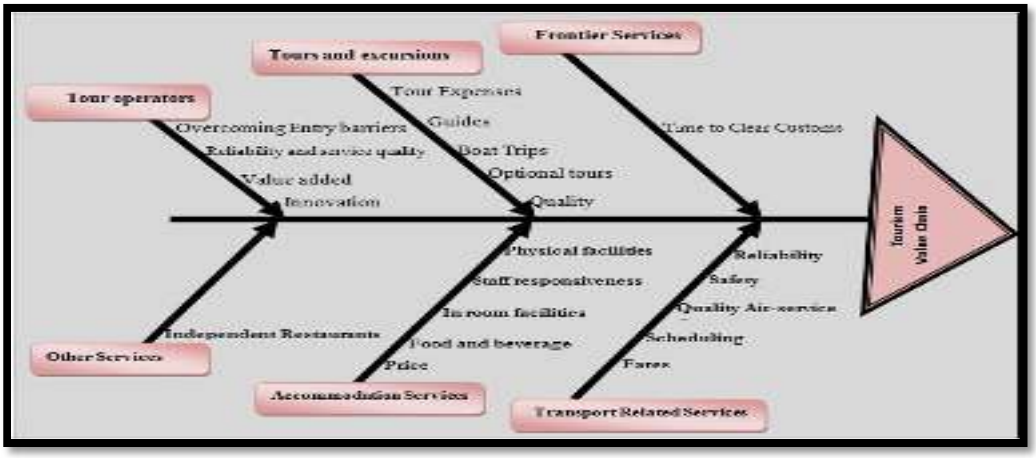

Figure (6): Tourism Value Chain fishbone

Conclusion and implementations

This study has categorized the 28 tourism value chain attributes into six main factors: frontier services, tours and excursions, tour operators, transport related services, accommodation services and other services. The fishbone diagram was used as a systematic way of looking at effects and the causes that create or contribute to those effects. Because of the function of the Fishbone diagram, it may be referred to as a cause-and-effect diagram. By using IPA, this study has compared the importance and performance of the tourism value chain factors, as perceived by travelers. The IPA grids have illustrated that the tour operators and Transport Related Services factors fell into the Concentrate Here quadrant; accommodation services and tours and excursions in the Keep Up the Good Work quadrant; and other services and Frontier Services in the Low Priority quadrant. No attribute has been identified in the Possible Overkill quadrant.

The use of IPA and fishbone has contributed to the literature and the industry. Academically, the use of IPA to investigate the difference between the importance of the tourism value chain factors as perceived by travelers, and their perceptions of a destination actual performance in relation to these factors, could contribute to further research studies in the area of consumer decision-process theory. In practical terms, the IPA technique has helped to divide the tourism value chain (services and facilities) into four identifiable quadrants, so that stakeholders of the tourism industry are better able to understand how customers perceive their products and services. Moreover, using the fishbone diagram to draw a model for the most important factors affecting the destination choice for tourists.

There are two explicit advantages for tourism stakeholders in applying IPA analysis and fishbone diagram to their management know-how. First, IPA is a relatively economical and easily understood technique. Using a simple quadratic presentation, one can display the results graphically on a two-dimensional grid that explicitly shows the strengths and weaknesses of the tourism value chain attributes being studied. Second, using the results provided by IPA, in drawing the fishbone diagram enable tourism stakeholders to tailor-make marketing strategies based on the most important factors and their attributes, from the perspective of customers. This is a useful and efficient way for management to discover what problems exist, and why.

Once customers' needs are clearly well-known and understood, destinations are likely to be in a better position to anticipate and cater for their customers' requirements and desires, rather than merely reacting to their dissatisfaction.[48] Customers who are satisfied with their visit to a destination are more likely to become repeat customers, and to spread favorable word-of-mouth advertising[49]. Knowing how travelers perceive the quality of services and facilities is the means by which destinations can achieve a competitive advantage, distinguish themselves from competitors, increase customer loyalty, enhance corporate image, increase business performance, keep existing customers, and be a focus for new ones.[50,51]

Overall, this study has yielded some interesting findings. However, further research needs to be conducted to gain a better understanding. Enlarging the sample size, as the technique used in the current study is restricted by sample size. It is valuable to choose another tourist destination, it is recommended in order to have a more comprehensive view. Besides, it would be useful to examine feedback of suppliers who share in the tourism value chain to key out the obstacles which confront them during production.

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تحديد العوامل الضرورية لسلسلة القيمة بالمجال السياحى: تحليل الاهمية والاداء

سلسلة القيمة هى عبارة عن سلسلة من الانشطة التى تقوم بها اى مؤسسة فى اى صناعة لتقديم منتج او خدمة ذات قيمة عالية. لذا يجب دراسة وتطويرمفهوم سلسلة القيمة بالسياحة لتقديم منتج سياحى متميز. وبالرغم من ان هناك كتابات كثيرة عن قياس الاداء فى الصناعات التحويلية، الا انه يوجد عدد محدود من الابحاث التى تناولت صناعة السياحة . وبالرغم من انه هناك تركيز كبير على جودة الخدمات ورضا العملاء وعلاقتهم بالاداء فى صناعة السياحة، الا انه لا توجد دراسات تقوم بدراسة سلسلة القيمة فى المنتج السياحى من وجهة نظر العملاء. ولهذا فان هذه الدراسة قامت لمواجهة هذا القصور حيث ان هدفها الاساسى هو اختبار سلسلة القيمة بالسياحة باستخدام نموذج "عظمة السمكة" حتى يمكن تحقيق تحسن مؤثر فى سلسلة القيمة بالسياحة. ولتحقيق هذا الهدف استخدمت هذه الدراسة تحليل الاهمية والاداء لكى يمكن اختبار مدى اهمية ومستوى اداء ستة عوامل اساسية والتى تؤثر بشكل عام على شكل وكفاءة سلسلة القيمة وذلك من وجهة نظر العملاء . وكانت الستة عناصر موضع الدراسة هى " خدمات الحدود" و"السفر والرحلات" و"منظمى الرحلات" و"الخدمات المتعلقة بالنقل" و"خدمة الاقامة" و"الخدمات الاخرى" . وقد اظهرت شبكة تحليل الاداء والاهمية ان" منظمى الرحلات" و" الخدمات المتعلقة بالنقل " توجد بمربع الاهتمام والتركيز فى حين وجدت "خدمات الاقامة" و" السفر والرحلات " بمربع اداء و اهمية عالية ويجب الاستمرار . اما "الخدمات الاخرى" و"خدمات الحدود" توجد فى مربع الاقل أولوية ولا توجد اى عناصر فى مربع الاداء والاهمية المنخفضة.