tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

National Tourism Sector Strategy

FEBRUARY 2011

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Abbreviations and acronyms

A

AASA	Airlines Association of Southern Africa
ACSA	Airports Company South Africa
ADB	African Development Bank
AID	Agency for International Development
ANC	African National Congress
ASATA	Association of South African Travel Agents

B

BARSA	Board of Airline Representatives of South Africa
BBBEE	Broad-Based Black Economic Empowerment
BCEA	Basic Conditions of Employment Act
BEE	Black Economic Empowerment

C

CEO	Chief Executive Officer
COASA	Coach Operators Association of South Africa
COGTA	Cooperative Governance and Traditional Affairs (Department of)
CSI	Corporate Social Investment

D

DBSA	Development Bank of Southern Africa
dti	Department of Trade and Industry

E

EXSA	Exhibition and Event Association of Southern Africa

F

FDI	Foreign Direct Investment
FEDHASA	Federated Hospitality Association of Southern Africa
FIFA	International Football Federation
FTTSA	Fair Trade in Tourism South Africa

G

GCS	Global Competitiveness Study
GDP	Gross Domestic Product

I

IATA	International Air Transport Association
IDC	Industrial Development Corporation
IDP	Integrated Development Plan
ILO	International Labour Organisation
IMC	International Marketing Council
IPAP2	Industrial Policy Action Plan

L

LED	local economic development
LSM	Living Standards Measure
LTB	Local Tourism Bureau

M

MAA	Marketing Association Afrique
MEC	Member of Executive Council
MINMEC	Intergovernmental Tourism Forum of National Minister and Members of Executive Councils (MECs) for Tourism
MIPTECH	Interprovincial Tourism Technical Committee of Provincial and National officials
MOU	Memorandum of Understanding
MTSF	Medium-term Strategic Framework

N

NAAMSA	National Association of Automobile Manufacturers of South Africa
NCB	National Conventions Bureau
NDT	National Department of Tourism
NEDLAC	National Economic Development and Labour Council
NGO	Non-governmental organisation
NTSS	National Tourism Sector Strategy

P

PATII	Priority Area for Tourism Infrastructure Investment
PCO	Professional Conference Organiser
PIC	Public Investment Corporation
PPP	Public-Private Partnership

R

RASA	Restaurant Association of South Africa
RTO	Regional Tourism Organisation

S

SAA	South African Airways
SAACI	South African Association for the Conference Industry
SADC	Southern African Development Community

SALGA	South African Local Government Association
SAPS	South African Police Service
SAT	South African Tourism
SATSA	Southern Africa Tourism Services Association
SDA	Skills Development Act
SDI	Spatial Development Initiative
SETA	Sector Education and Training Authority
SITE	Society of Incentive and Travel Executives
SMEs	Small and Medium Enterprises
SMMEs	Small, Medium and Micro-Enterprises
Stats SA	Statistics South Africa

T

TBCSA	Tourism Business Council of South Africa
TECSA	Tourism Empowerment Council of South Africa
TEP	tourism enterprise partnership
TFCA	Transfrontier Conservation Area
TFDS	Total Foreign Direct Spend
TGCSA	Tourism Grading Council of South Africa
THETA	Tourism, Hospitality and Sports Education and Training Authority
TSA	Tourism Satellite Account
TSI	Tourism Safety Initiative
TV	Television

U

UNWTO	United Nations World Tourism Organisation

V

VFR	Visiting Friends and Relatives
VOASA	Vacation Ownership Association of Southern Africa

W

WEF	World Economic Forum
WTTC	World Travel and Tourism Council

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1. Introduction

1.1 Background

The tourism industry in South Africa **has grown considerably** since the country's first democratic elections in 1994. The number of foreign visitor [1]arrivals increased from just more than 3 million in 1993 to over 9,9 million in 2009 of which, just over 7 million were tourists[2]. Foreign visitor arrivals for the period January to November 2010 was 10.3 million of which 7.3 million were tourists. The African continent is the largest source of foreign visitor arrivals, and the region contributed an additional 414 294 visitor arrivals in 2009 – a growth of 5,6% since 2008. The air markets in Africa grew by 3,3% in 2009, continuing its steady growth since 2002. The land markets in Africa also increased by 5,7% in 2009. Research indicates that domestic tourism decreased by 8% in 2009, with 30 million trips undertaken compared to the 33 million in 2008.

The tourism sector is not only **a multifaceted industry** that contributes to a variety of economic sectors, but also **a labour-intensive industry with the capacity to create jobs**. The 2010 Tourism Satellite Account (TSA),[3] which measures the tourism sector's direct contribution to the country's economy, estimates this contribution at about R67 billion, or 3% of South Africa's gross domestic product (GDP**)**. It further estimates that about in 2008, a total of 599 412 people (or approximately 4,4% of total employment) are directly employed by the tourism industry, and that domestic tourism contributes 52% of total tourism consumption.

Tourism is **a priority economic sector** in the government's Medium-Term Strategic Framework MTSF) 2009 election manifesto, which identifies the following overall priorities:

- Creating decent work and sustainable livelihoods
- Education
- Health
- Rural development, food security and land reform
- The fight against crime and corruption, and building cohesive and sustainable communities

Cabinet approved South Africa's New Growth Plan at a special meeting held in October 2010. The plan identifies tourism as **one of the six core pillars of growth**, with the other pillars being infrastructure development, the agricultural value chain, the mining value chain, the green economy, and manufacturing sectors in the Industrial Policy Action Plan (IPAP2).[4]

[1] A visitor refers to any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of the trip is other than the exercise of any activity remunerated from within the place visited.
[2] A tourist(overnight visitor) is a visitor who stays at list one night in collective or private accommodation in the place visited
[3] Statistics South Africa. Tourism Satellite Account (TSA) for South Africa, final 2005 and provisional 2006 to 2008. November 2010. A satellite account is an instrument developed by the United Nations to measure the size of economic sectors not defined as industries in National Accounts, such as Tourism.
[4] Republic of South Africa. Economic Sectors and Employment Cabinet Clusters. 2010/11–2012/13 Industrial Policy Action Plan (IPAP2). February 2010.

The IPAP2 indicates that tourism is **one of the areas expected to contribute to the development of, among others, rural areas and culture** (craft) by growing the economy and creating jobs. The document also highlights the huge potential of increased local consumption due to domestic tourism.[5] It further indicates that the country has not fully utilised the potential contribution of the film and television industries, which are growing at a rate of just over 9% and 6% respectively. These industries could reach a greater tourism market audience than certain targeted advertising campaigns; they educate and bring about socialisation as well as the preservation of cultural heritage, and have generated revenue of over USD1 trillion in 2003.[6] The IPAP2 clearly indicates that tourism brings about foreign investment, consumer spending and foreign earnings. Tourism is fairly easy for entrepreneurs to enter; it is a sector founded on sustainable resources, and provides for a large-mass labour force.

It is also important to recognise that **tourism plays a role in strategically creating and/or strengthening international relations** in order to build beneficial socio-economic and political networks. Therefore, investment in tourism has to be leveraged to contribute to national growth and sustainable development. Tourism, even though not yet classified as an economic sector in the National Systems of Accounts,[7] has become **a great contributor to national accounts**, and thus requires investment in line with tourism performance indicators, GDP and revenue targets. According to the IPAP2,[8] the key investment areas to ensure tourism performance and economic growth are the following:

- Niche tourism development
- Tourism export development and promotion
- Airline pricing structure investigation

The above priorities, also emanating from the 2009 election manifesto, are expected to “target the needs of the youth, women, workers, the rural poor, the elderly, and people with disabilities”.

In turn, Government’s Medium-term Strategic Framework (MTSF), which was developed with the above in mind, identifies the following strategic priorities:

- Accelerating growth and transforming the economy to create decent work and sustainable livelihoods
- A massive programme to build economic and social infrastructure
- A comprehensive rural development strategy linked to land and agrarian reform and food security (with specific mention of tourism as **an economic activity in rural areas**)
- Strengthening the skills and human resource base
- Improving the health profile of all South Africans
- Intensifying the fight against crime and corruption
- Building cohesive, caring and sustainable communities (with specific mention of tourism in relation to **building national pride**)

[5] IPAP2, p 76.
[6] IPAP2, p 77.
[7] The National Systems of Accounts refers to a system of accounts enabling comparisons of all significant economic activities.
[8] P 82–84.

- Pursuing African advancement and enhanced international cooperation
- Sustainable resource management and use
- Building a developmental state, including improvement of public services and strengthening of democratic institutions

The hosting of the 2010 International Football Federation (FIFA) World Cup has boosted the tourism industry in South Africa by attracting visitors, expanding tourism and other infrastructure, and showcasing the South African destination to the world. However, research indicates that **there are still numerous opportunities for tourism growth** that are not being fully exploited. South African Tourism's (SAT) Marketing Tourism Growth Strategy for South Africa (2011–2013) indicates that the potential number of visitors that could be attracted from 11 target markets[9] over time was about 76,5 million, with the size of the target segments within each of the 11 markets being 28 million consumers.

Against this background, the new National Department of Tourism (NDT), under the direction of the Minister of Tourism, initiated and managed an inclusive process to draft a National Tourism Sector Strategy (NTSS) to inspire and accelerate the responsible growth of the tourism industry from 2010 to 2020. It is essential that South Africa implements this strategy to realise its inherent tourism potential and to ensure that the country's investment in the 2010 World Cup is fully leveraged to deliver ongoing tourism benefits.

1.2 Summary of process

The NTSS was compiled through **a comprehensive consultative process**. Stakeholder contributions from the five ministerial roadshows undertaken in July and August 2009, and specific strategy stakeholder workshops held in every province in July, August and September 2009, were considered and incorporated wherever possible. In addition, stakeholders were given the opportunity to comment through a web-based survey conducted in October 2009 (see Annexure C for results).

The Minister appointed **a panel of 32 experts** from across all major stakeholder groups in the industry, with representation from both the public and the private sector. This expert panel guided the development of the NTSS, and the core elements of the strategy were developed during a series of workshops with the panel and its various subcommittees. A number of **other tourism stakeholders** were asked to provide input on action plans in their specific areas. The panel submitted their report to the Minister in December 2009. (A full list of the members of the expert panel and other specialists consulted is contained in Annexure B.) This was followed by **an intergovernmental consultation process**, which culminated in the MINMEC – the intergovernmental tourism forum of the National Minister and Members of Executive Committees (MECs) for Tourism – giving the Minister the go-ahead to commence with **Cabinet consultation**.

The draft NTSS was approved by Cabinet, and launched during May 2010 for **public comment**. It was further gazetted in June 2010, with a closing date of 31 July 2010. Some 37 000 comments were

[9] SAT target markets included in this projection are China, Japan, Kenya, Nigeria, the United States, the United Kingdom, Australia, India, France, Germany and the Netherlands.

received from a range of stakeholders, including individuals, associations, government departments and provinces. All comments were considered in the finalisation of this document.

1.3 Strategic framework

This section presents the global and national contextual framework within which this strategy has been compiled.

1.3.1 Global context

Tourism is one of the largest industries in the world. However, it was **hard hit by the global crisis**, with the travel and tourism GDP contracting by 4,8% in 2009. However, according to the World Tourism Organisation's (UNWTO) January 2011 report, global international tourists arrivals went up by almost 7% in 2010 compared to the same period 2009. This is a good recovery following a decline of 2009 which was due to factors such as the global economic recession. Emerging economies remain the main drivers of this recovery for the tourism sector. Africa, the only region that experienced a positive growth in 2009 continued to grow at a rate of 6%in 2010.

Mega events were significant contributors to global tourism growth in 2010, through events such as Winter Olympics in Canada, the Shanghai Expo in China, the FIFA World Cup in South Africa and the Commonwealth Games in India.

According to World Travel & Tourism Council's (WTTC) estimates, global travel and tourism sector's contribution to GDP is expected to rise from 9.3% in 2010 to 9.7% by 2020. It further estimates that total employment is expected to rise from 235,785,000 jobs (8.1%) of global employment to 303,019,000 (9.2%) by 2020.

In addition to the above expected tourism performance post-2009, the UNWTO proposed a "Roadmap to Recovery" for the tourism industry in the aftermath of the global economic crisis. As listed in Table 1 below, this document, presented in Kazakhstan in October 2009, outlines 15 recommendations in three action areas, namely resilience, stimulus and the green economy.

I. RESILIENCE	II. STIMULUS	III. GREEN ECONOMY
1. Focus on job retention and sector support 2. Understand the market and respond rapidly 3. Boost partnerships and competition 4. Advance innovation and technology 5. Strengthen regional and interregional support	6. Create new jobs, particularly in small and medium enterprises (SMEs) 7. Mainstream tourism in stimulus and infrastructure programmes 8. Review tax and visa barriers to growth 9. Improve tourism promotion and capitalise on major events	11. Develop green jobs and skills training 12. Respond effectively to climate change 13. Profile tourism in all green economy strategies 14. Encourage green tourism infrastructure investment 15. Promote a green tourism culture in suppliers, consumers and communities

I. RESILIENCE	II. STIMULUS	III. GREEN ECONOMY
	10. Include tourism in aid-for-trade and development support	

Table 1: The proposed "Roadmap to Recovery"

Despite the current difficulties facing the tourism industry as a result of the global economic situation, the **industry is resilient**. Previous crises, such as the 9/11 terrorist attacks in the United States in 2001, the severe acute respiratory syndrome/avian flu outbreak in Asia in 2003, the two Gulf wars, the tsunami in Thailand in 2004, the Asian financial crisis of 1998, and the oil crisis of the late 1970s and early 1980s, all resulted in very small declines in global tourist arrivals, and the industry continues to maintain a long-term arrivals growth trend of about 4% per annum.

However, the **industry worldwide continues to be affected by a number of factors**. **Global exchange rate volatility, oil prices and fuel hedging costs** affect airline profits and tourist volumes alike. Although jet fuel and crude oil prices are still significantly below the 2008 peak, they are rising steadily. Oil prices have an impact on aviation fuel prices, the cost structure of the global tourism market, and the affordability of access to long-haul destinations, such as South Africa.

A further cost driver relates to the policy response to climate change. Of particular concern is the absence of a multilaterally agreed regime for managing international aviation emissions, and the imposition of **discriminatory, unilateral taxes**, which are adding significantly to the cost of travel for already-weak leisure travellers from Europe. The new aviation taxes in the United Kingdom, Germany and Austria are expected to add 2–4% to ticket prices, with a material adverse impact on passenger numbers, which are already weak from Europe. Pressure is building up to make this a collective public policy issue, and various long-haul destinations in the developing world are coordinating efforts to call for a multilaterally agreed framework, and, at the very least, that revenue collected for so-called green taxes on international travel and tourism be earmarked for green innovation and growth in the sector, with full involvement of the sector's stakeholders. The principle of pricing carbon to remove market distortions and internalise the cost of negative externalities is not disputed. What is of concern is the imposition, outside any multilateral framework, of arbitrary taxes on an extremely price-sensitive transnational sector.

Despite travel demand being pretty robust, **consumer confidence** in the aviation sector has not recovered in the same way as business confidence. Globally, airlines find themselves under pressure, with passenger numbers having declined by some 5% in 2009. Airline analysts expect headwinds in leisure travel to continue for up to another three years, especially from Europe, and a mid-cycle market slowdown in passenger numbers is also forecast for 2011. This risk is exacerbated by the shift from government fiscal stimulus to austerity measures in much of the Eurozone. That said, future prospects are more upbeat, with 2,5% growth in air travel demand expected in North America and 3,4% in Europe for 2010. An average annual increase of 8,4% over the next 20 years is forecast for China.

Changes in technology have also resulted in major changes in the way the tourism industry does business. The Internet has become an important source of information for travellers, providing them with an opportunity to obtain information both directly from destinations and tourism businesses as well as from fellow travellers through social networking, blogs and travel advisory websites. Where being wirelessly connected was something unusual a couple of years ago, it is now expected that travellers will be provided with an opportunity to connect. New technology could facilitate a platform for unlimited choices, where tourists tailor-make their desired experiences, and will increasingly make long-haul destinations more accessible in the global marketplace. However, it will also make competition tougher, and, as such, also poses a threat.

Technology is increasingly substituting the traditional travel agent and other commercial enterprises as the chief mediator between customers, tourism destinations and a range of travel services. In future, the integration of information technology, mobile technology (‘m-commerce’), social media and e-marketing will increasingly drive the choice of destinations, the tailoring of holidays, and new ways of booking and paying for travel. That said, this is a rapidly evolving space characterised by the parallel rise in mobile technology and social media. It is not clear as yet how social media will evolve in the next few years, and which technology medium will win the race in the consumer mindset.

Travel and tourism have also begun to establish its place on **the green growth agenda**. The importance of the green economy is highlighted as one of the three focus areas of the “Roadmap to Recovery”. According to almost half of European business travellers, company environmental policies affected their travel behaviours. Global sustainable tourism criteria were released in October 2008, and more and more travellers are interested in finding out more about the local social and environmental issues before booking a holiday. A carbon-constrained world will not affect airlines alone. In far less than a decade, a low-carbon value chain for the tourism sector will be an increasingly important driver of competitiveness. Not only will industry in the near future be faced with the changing preferences of consumers who want to travel responsibly, as well as increased shareholder activism, but, from government’s side, they can also expect a much tighter regulatory framework on issues of the green economy.

In this regard, the World Travel and Tourism Council (WTTC) has already committed to a 50% reduction in CO_2 emissions by 2035. The aviation sector [International Air Transport Association (IATA)] aims for a 1,5% improvement in fuel efficiency per year up to 2020; carbon-neutral growth or a cap on emissions from 2020, and net carbon emissions of 50% below those of 2005 by 2050.

The shift to low-carbon cities presents many indirect opportunities in providing the required innovation, technology deployment and new market offerings on the adaptation and mitigation sides – not least for ‘green’ entrepreneurs, ‘green’ work forces and decent ‘green’ work, and ‘green’ investment in tourism-related infrastructure, such as hotels, land transport, airports and conservation assets. Moreover, particular opportunities in the tourism sector include green building design and sustainable land transport, the energy-efficiency retrofitting of accommodation establishments and other hospitality infrastructure, and the enhanced roll-out of renewable energy sources and improved waste management.

Market trends that are affecting the tourism industry include **demographics and lifestyle changes** (e.g. ageing travellers, more young people travelling and reduced leisure time). More people are interested in ‘volunteering’ (combining unique travel opportunities with meaningful volunteer work); gap years are not only taken by the youth, and travellers are looking for authentic and niche experiences, among other trends. The demand for mass-based leisure tourism is being replaced by a desire to connect emotionally with destinations, local people and local cultures.

Price-conscious customers in traditional source markets are retiring later, are travelling for shorter periods, are spending less, and are taking trips closer to home. At the same time, the ageing baby-boomer market of Europe and America are moving into a consolidation phase of their lives, and their travel preferences are maturing. The general trend is for travellers to book later and to keep their options open until as late as possible in order to obtain better deals. In response to the more value-oriented mindset, various destinations are developing innovative travel packages and new products to attract customers. An appropriate response to these trends will therefore ensure the resilience of the industry in the long term.

The **recent global financial crisis** has fundamentally changed the economic and consumer landscape for tourism. Traditional source markets are showing a decline in outbound travel, and demand in the Western world remains weak. The European Union's working population is declining, as is Japan's. At an average of 6% economic growth, China, India and other emerging markets are expected to recover faster than traditional source markets. The growing middle-income countries will become the leading outbound markets of the future. This does not render the traditional markets insignificant, and income per capita in these markets will still overshadow those in the emerging markets. However, overall, the long-term opportunity lies in the fact that the middle class will increasingly be found in China, India, Africa and Latin America, and that the share of discretionary spending and consumption in these markets will increase dramatically.

Thus, it is evident that the travel and tourism sector is crisis-sensitive, but also responds well to signs of recovery. However, the UNWTO expects that the economic crisis will soften demand in the short term, but that the tourism industry will bounce back and continue its growth path in line with the long-term arrivals growth forecast of 4% per annum. According to the WTTC,[10] tourism's contribution to GDP was expected to rise by 2% in 2010, creating an extra 964 000 jobs worldwide. The WTTC further reported that the true value of the tourism industry accounted for 9,2% of global GDP, and contributed USD5,8 trillion to the global economy. The Council also forecast that the global travel and tourism economy will grow by 4,3% per year over the next ten years, which will create an additional 66 million jobs by 2020.

1.3.2 South African context

South Africa has come a long way since its first democratic elections in April 1994. The 15-year review recently conducted by government indicates that significant progress has been made in some areas, but that some challenges still remain. In general, the population is satisfied with government's performance over the past 15 years.

South Africa has managed to stabilise its macro-economy, with interest rates declining, a less volatile rand, and domestic demand increasing as a result of a growing middle class. Despite these, there are

[10] Viewpoint newsletter. Winter 2010.

concerns in respect of the coordination and integration of economic policies (industrial, fiscal and monetary), and the inclusion of the second economy in the mainstream remains a challenge. Growth in spending is underpinned by infrastructure investment, including investment in new tourism products and activities.

After the 2009 elections, President Jacob Zuma's government has made significant changes in the government ministries, including the **establishment of a stand-alone Ministry of Tourism**, which indicates that the tourism industry itself has grown in stature and is being taken seriously by government. Government has to create sustainable jobs and ensure that the lack of wealth is addressed in all areas, particularly in rural environments. Despite early expectations that South Africa may be shielded from the worst of the global economic crisis, the second quarter of 2009 was the second consecutive quarter of decline in the GDP, and resulted in the country officially being in a recession. However, since the third quarter of 2009, the country has been on a recovery path, and the results from the third quarter of 2010 confirmed that the country is continuing on that path, with a marginal 2,6% growth in GDP quarter on quarter.[11]

The retail industry is said to be gaining momentum against the backdrop of economic recovery;[12] the property market has shown significant signs of recovery, and, according to the National Association of Automobile Manufacturers of South Africa (NAAMSA), new motor vehicle sales increased by 29,6% year on year in December 2010.[13] Therefore, it is expected that the economy will stabilise the job market, and enable government to stimulate employment opportunities and ultimately eradicate poverty. Air transport is also a key enabler for leisure and business tourism. The number of airlines offering direct flights to South Africa declined from 66 in 1998 to 53 in 2008, but the country has high load factors (>65%); total air passenger movements are increasing rapidly, and South Africa boasts much-enhanced airport infrastructure.

As indicated in the introduction, the **tourism industry has grown significantly since the 1994 elections** (see Figure 1 below). Over the years, the **number of hotels** in key locations, such as Cape Town, Johannesburg, Pretoria and Durban, has increased to accommodate a growing number of travellers, and, in recent years, the **growth in occupancy rates and average room rates** was robust. However, after the 2010 World Cup's increased infrastructure supply, the accommodation sector is facing challenges in terms of occupancy rates. Similarly, other country developments, such as the property boom after South Africa's selection as host of the 2010 World Cup, imposed a significant burden on electricity supply, resulting in power shortages and increased prices.

[11] Statistics South Africa. Gross Domestic Product, Annual estimates 2000–2009, Regional estimates 2000–2009, Third quarter: 2010. Statistical Release. November 2010.
[12] South African Retail Industry Forecast to 2013. October 2010.
[13] "New vehicle sales end 2010 with 29.6% hike". Business Day. 10 January 2011.

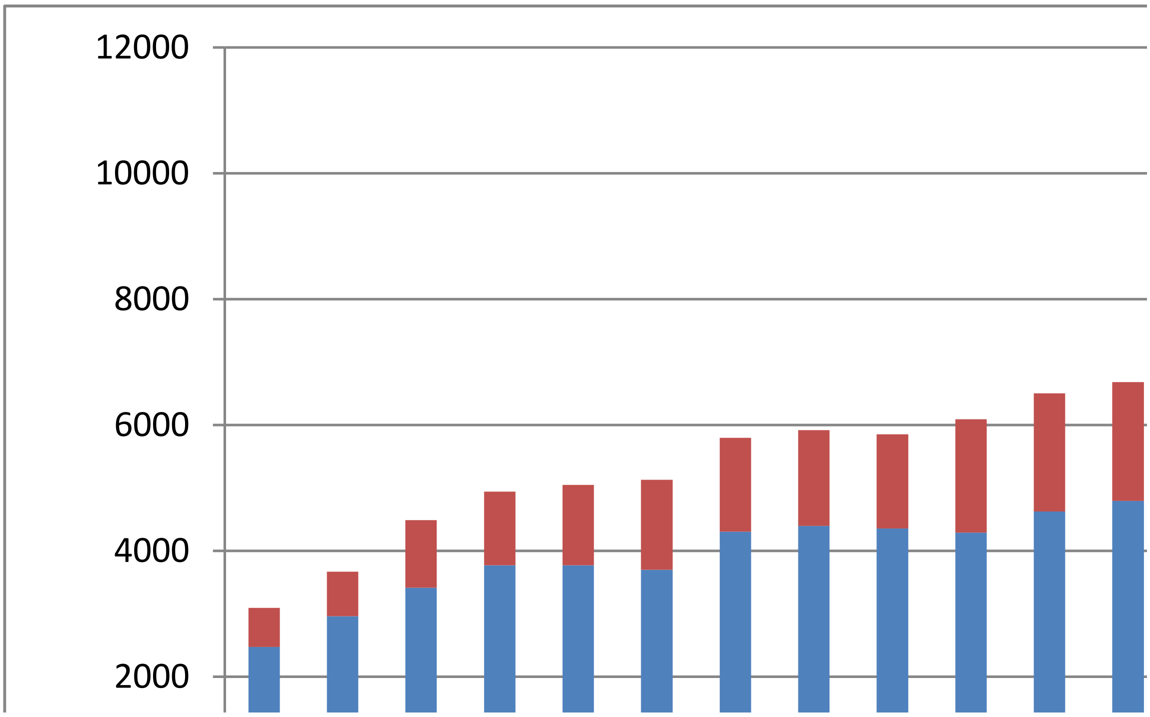


Figure 1: Annual visitor arrivals for overseas markets compared to Africa

According to SAT's 2009/10 Annual Report, the overseas market comprised 1,751 million in 2009, showing a slight decline compared to 2008, whereas **the African market increased tremendously** in 2009 to a total of 8,182 million compared to 7,370 million in 2008 (see **Figure 1** above). The global economic crisis has also affected South African foreign visitor arrivals, growing by just 1,6% during the first eight months of 2009 compared to the same period in 2008. The growth is mainly due to the 5,3% growth in arrivals from African land markets, while African air arrivals declined by 14,5%, and overseas arrivals declined by 7,4% during the same period.

The domestic market was also affected by the financial crisis, as domestic tourism decreased by 8% in 2009, with 30 million trips undertaken compared to the 33 million in 2008. About 48% of the South African adult population travelled (approximately 15 million domestic tourists took an average of 2,1 domestic trips in 2009), which means that **more South Africans travelled, but took fewer trips**.

A study conducted by the Bureau of Market Research at the University of South Africa (UNISA) on personal income estimates in South Africa in 2010 indicates that 3,489 549 adults are within the R100,000 to R300,000 income bracket. It also states that a further 789,744 adults earn between R300,000 and R500,000 per person. These groups represent the core of middle class South Africans and can significantly contribute to increased domestic holiday travel and further grow domestic tourism contribution to the economy.

Tourism has continuously recorded significant growth since the dawn of democracy in South Africa, however, the sector is exposed to challenges such as seasonality and geographic spread across and within the provinces. This limit the participation and spread of tourism benefits across the country

The 2009 DTS indicates that the average spend per trip for a business domestic traveller is R2,340 in comparison with R730 average spend per domestic trip in general. This indicates the value of business tourism in the country, to which government and corporate South Africa are significant contributors. Domestic tourism contributed R22,4 billion into the country's economy.

Against the total growth in volume, there was also an **increase in total foreign direct spend** (TFDS), which amounted to R5 billion in 2009, driven by African land markets, Asia and the Australasia regions. Increases in volume and average spend per day contributed to the increase in TFDS. Foreign tourists to South Africa spent fewer nights in the country in 2009 compared to 2008. In 2009, the average length of stay of a foreign tourist was 7,5 nights compared to 8,2 nights in 2008. The decrease in length of stay was driven by a decrease in both land and air markets, although more so by the former, which was down 6,7%, compared to the 2,9% drop in air markets.

The recently hosted **World Cup** as well as the success of the **2009 Confederations Cup** contributed to South Africa's economic recovery. Government spent vast amounts of money on **upgrading infrastructure**, such as roads, telecommunications, safety and security, airports and stadiums, and major infrastructure spend is expected to continue until 2014. Publicity and improved awareness about South Africa as a result of the World Cup are expected to boost the South African tourism industry in 2011 and 2012, by which time the economic situation is expected to have stabilised.

1.3.3 Global competitiveness

South Africa's tourism competitiveness is outlined in SAT's Global Competitiveness Study (GCS) (2010) and the World Economic Forum's (WEF) Travel and Tourism Competitiveness Report (2009). SAT's GCS compares South Africa's positioning and performance to those of key competitors, namely Australia, the United States, Kenya, Thailand and Brazil. The WEF report, in turn, compares the tourism performance of 133 countries on the basis of 70 indicators.

According to the SAT GCS, South Africa maintained the **highest growth in tourism's GDP contribution**, at 13%, compared to Australia's 12% despite that country's low tourist volumes. However, the other four countries are outperformed by Brazil, where tourism contributed 24% to GDP. In South Africa, foreign visitor arrivals still generate a larger tourism spend than the domestic market, and thus, the **dependence on foreign visitor arrivals renders the industry vulnerable** and should be compared with, for example, Brazil, where domestic tourism is by far the largest component and spend/domestic tourism figures are much higher. Brazil and Thailand had relatively high direct employment creation/tourist numbers, at 2,222 million and 1,900 million respectively in 2008. Comparatively, South Africa recorded a total of 439 000 direct job opportunities provided and 4% growth between 2003 and 2008. In the same period, Australia recorded 0% growth in jobs, and was standing at 499 000 direct jobs.

In terms of the drivers of growth, South Africa has the **most favourable repeat visitor rate for foreign arrivals** of all benchmarked countries. On average, domestic tourists visit more provinces than international tourists. However, since 2005, this market is in decline, and spending per trip for the domestic market lags behind that of all our benchmarked competitors. Though the governments of most of our competitors spend a greater percentage of GDP on tourism, the South African **government's overall spending on travel and tourism has witnessed high growth** between 2002 and 2008.[14] By comparison, Australia's government spends 1,8 times more (as a percentage of GDP) on tourism than the South African government, but the former focuses more on value than volume.

In response to the global financial crisis and the "shift in consumer attitude towards a more value-oriented mindset", **many of South Africa's competitors have launched new products**, i.e. value-oriented travel packages aimed at "leveraging innovative travel packages to attract price-conscious customers", and have refocused their efforts on "value-oriented marketing campaigns".[15] For example, Thailand changed the tag line of their marketing campaign from "Amazing Thailand" to "Amazing Thailand, Amazing Value", and Greece promotes itself as "A masterpiece you can afford".

The WEF Travel and Tourism Competitiveness Report indicates that South Africa's **strongest areas** are natural sites (10th) and cultural resources (45th), attractive price competitiveness for hotel rooms and a favourable tax regime (38th), good air transport infrastructure (43rd), and favourable policy rules and regulations (36th). The **weakest areas** are safety and security (128th), access to health services (94th), ticket taxes and airport charges (70th), and human resources, which include qualified labour (131th).

2. Strategy overview

The guiding principles for the NTSS are as follows:

2.1 Vision

To be a Top 20 tourism destinations in the world by 2020

2.2 Mission

To grow a sustainable tourism economy in South Africa, with domestic, regional and international components, based on innovation, service excellence, meaningful participation and partnerships

2.3 Values

Trust – The multiple partnership relationships shall be built on trust; all parties should have mutual trust that they are all aiming for the same vision and goals.

Accountability – All players shall accept responsibility to deliver on the actions and objectives on which they embark.

Respect for our culture and heritage – All tourism development and activities shall respect all aspects of South Africa's diverse heritage and culture.

[14] South African Tourism. Global Competitiveness Study. 2010.
[15] South African Tourism. Global Competitiveness Study. 2010.

Responsible tourism – All tourism development and activities shall deliver on the triple bottom-line, namely economic, social and environmental sustainability.

Transparency and integrity – All stakeholders in the industry shall act with the utmost integrity in their dealings with each other, with other role players in South Africa and elsewhere, and with tourists and visitors.

Service excellence – The entire industry, including the non-tourism service providers such as retail and Home Affairs, shall continually strive for service excellence towards all our tourists.

Upholding the values of our Constitution – Human dignity and equality shall be respected

A commitment to transformation – The entire industry shall understand and unequivocally support the moral need for transformation.

Flexibility and adapting to change – As a sector, we shall be responsive, and ready and willing to change and adapt as changing circumstances require.

3. Strategic objectives, targets and clusters

3.1 Strategic objectives

Theme 1: Tourism growth and the economy

1. To grow the tourism sector's absolute contribution to the economy
2. To provide excellent people development and decent work within the tourism sector
3. To increase domestic tourism's contribution to the tourism economy
4. To contribute to the regional tourism economy

Theme 2: Visitor experience and the brand

5. To deliver a world-class visitor experience
6. To entrench a tourism culture among South Africans
7. To position South Africa as a globally recognised tourism destination brand

Theme 3: Sustainability and good governance

8. To achieve transformation within the tourism sector
9. To address the issue of geographic, seasonal and rural spread
10. To promote 'responsible tourism' practices within the sector
11. To unlock tourism economic development at a provincial and local government level

3.2 Strategic objectives by focus areas, targets and baselines

Theme 1: Tourism growth and the economy

Objective	Focus	Measures and targets	More detail	2009 baseline	2015 target	2020 target	Growth/change rationale
1. To grow the tourism sector's absolute contribution to the economy	**GDP**	Increase in tourism GDP levels	Industry (direct impact)	R71,4 bn (3% of GDP)	R118,4 bn (informed by the baseline, and modelled on the WTTC growth percentage and targets)	R188 bn (2,9% of GDP)	
			Economy (direct and indirect impact)	R189,4 bn (7,9% of GDP)	R318,16 bn	R499 bn	This is an estimate, and assumes that the same direct-to-indirect impact ratio prevails as per the WTTC Simulated Satellite Account 2010.
	Foreign visitor arrivals	Increase in foreign visitor arrivals[16]	African air arrivals African land arrivals Intercontinental arrivals Total foreign arrivals	317 122 7 490 425 2 050 699 9 933 966	Total arrivals: 12 068 030	Total arrivals: 15 000 000	Resulting compound annual growth rate of 3,8% from 2009 to 2020
	Domestic	Increase in number of	Number of adult	14 600 000	16 000 000	18 000 000	Derived a 2020 target by

[16] Statistics South Africa only started releasing tourist arrivals figures in 2009. For forecasting purpose, at least 3 to 5 years data is required to see trends. Thus targets set will still be based on visitor arrival and will be revised post 2012

Objective	Focus	Measures and targets	More detail	2009 baseline	2015 target	2020 target	Growth/change rationale
	tourism	domestic tourists	travellers Population penetration [also broken down by living standards measure (LSM)] Total number of trips	48% 30,3 m trips	Average number of domestic trips: 2,5 Total domestic trips: 40 m domestic trips	Average number of domestic trips: 3 Total domestic trips: 54 m domestic trips	LSM penetration and trips per traveller. Resulting compound annual growth rate 2009–2020: 2% for domestic tourists, and 5,4% for domestic trips.
			Total number of domestic tourists, including children	No baseline			Research required to develop a baseline in order to set targets
	Employment	Increase in number of people employed in the sector	Number of direct jobs supported by the sector Number of direct and indirect jobs supported by the sector	389 100 919 800	403 900 968 300	461 700 1 097 000	The 2020 targets are as per WTTC estimates. Same growth applied as to tourism GDP; assumes no change in employment ratios to spend or visitors.
	Investment	Increase in public sector/government investment in tourism infrastructure	Research is needed to develop an accurate base and method for ongoing measurement in each of the three categories, or for the overall level of investment, if	WTTC R82,4 bn in total	R100 bn in nominal terms	R118 bn in nominal terms	As data are limited and extensive research would have to be done, will use sub-objectives and thrust action measures rather than full research to inform countrywide targets. For indicative targets, same growth applied as to

Objective	Focus	Measures and targets	More detail	2009 baseline	2015 target	2020 target	Growth/change rationale
			required. Each sector's contribution is to be individually determined.				tourism GDP, and assume totalled and averaged over period – flows do not grow year on year, but rather fluctuate depending on projects.
		Increase in private-sector capital formation (for new and existing products)					Research required to develop a baseline in order to set targets
		Increase in levels of foreign direct investment (FDI) in the tourism industry		R3 bn	R3,8 bn FDI average 2010–2015 in 2009 rands	R4 bn FDI average 2015–2020 in 2009 rands	
		Developing and agreeing on a memorandum of understanding (MOU) between the tourism industry and the Department of Land Reform and other relevant agencies, e.g. Land Claims Commissioners, to		n/a			Signed by April 2012

Objective	Focus	Measures and targets	More detail	2009 baseline	2015 target	2020 target	Growth/change rationale
		unblock challenges experienced with regard to land ownership and tourism investment initiatives					
2. To provide excellent people development and decent work within the tourism sector	**Providing decent work as an industry, and being recognised as a provider of decent work by government, labour and the labour market**	Developing and agreeing on an MOU between the tourism industry and the Department of Labour and other relevant departments, e.g. the Department of Education, detailing accepted 'decent job' definitions/codes for the tourism industry, and a plan to improve 'decent work' provision across the industry	Fair treatment and decent wages, with career progression opportunities. Include temporary/seasonal and casual labour, appropriate use and employment conditions at labour brokers	n/a			Signed by April 2012
		Increase in number of tourism enterprises complying with the codes of decent work, thereby increasing the number and percentage of people		Research is needed to provide an accurate base by industry subsector	70% compliance with the MOU	90% compliance with the MOU	

Objective	Focus	Measures and targets	More detail	2009 baseline	2015 target	2020 target	Growth/change rationale
		employed in decent jobs					
3. To increase domestic tourism's contribution to the tourism economy		Domestic tourism GDP as a percentage of tourism's overall contribution to GDP	Domestic tourism is the main sustainability factor for all successful destinations.	2010 TSA (52%)	55%	60%	Development of a domestic tourism strategy
		Upper LSMs – perceptions of taking South African holiday versus outbound holidays to outbound competitors. Middle LSMs – level of knowledge, understanding and propensity to take holidays.		No baseline			Baseline research needed to determine targets
		Increase in domestic holiday travel across all market levels	Number of first-time domestic holiday travellers	No baseline			Research required for establishing a baseline in order to set targets
			Levels of, and penetration into, black market for leisure domestic tourism	No baseline			Research required for establishing a base in order to set targets

Objective	Focus	Measures and targets	More detail	2009 baseline	2015 target	2020 target	Growth/change rationale
			Holiday travel penetration by LSM	No baseline			Research required for establishing a base in order to set targets
			Increase affordable and accessible tourism experiences for the domestic market	No baseline			Research on programme-specific targets – programmes to be developed under domestic tourism actions
			Total number of holiday trips	4 million in 2009	6 million domestic holiday trips	9 million domestic holiday trips	
4. To contribute to the regional tourism economy		Increase in levels of marketing in the African market	Establishment of marketing offices in key markets	No baseline	3	5	Baseline research needed to determine targets Strengthening of diplomatic missions' tourism capacity
		Number of regional tourism programmes implemented, e.g. transfrontier conservation areas (TFCAs) and their link to tourism development and growth		No baseline			Baseline research needed to determine targets

Theme 2: An enhanced visitor experience

Objective	Focus	Measures and targets	More detail	2009 baseline	2015 target	2020 target	Growth/change rationale
5. To deliver a world-class visitor experience	**Foreign (including regional) visitors**	Delivering experiences that equal or surpass the expectations of our visitors	National visitor satisfaction index across a number of key dimensions for domestic and foreign tourists Amalgamated indicator across visitor feedback and quality assurance systems Ensure service issues constraining domestic tourism growth, such as racist attitudes, are tracked	SAT satisfaction rating limited – ranges from 4 to 4,5 out of 5 over 10 dimensions. Need to develop a more comprehensive and nuanced visitor satisfaction tracking tool for foreign and domestic tourists, and include limited benchmarking. Develop a composite indicator of quality across various customer feedback and grading systems. Consider the SAT branding targets, which measure delivery on brand values, e.g. adventure. Also look at the Disney programme targets.			Once a baseline has been established, significant improvement will be targeted over the ten years.
	Domestic tourists	Meeting or exceeding the expectations of our tourists					
	Build a culture of	Increase in levels of		No baseline			Research baseline

Objective	Focus	Measures and targets	More detail	2009 baseline	2015 target	2020 target	Growth/change rationale
6. To entrench a tourism culture among South Africans	**embracing tourism among South Africans**	awareness of tourism and its value within South Africa Increase in levels of community participation in the sector					required to establish these attitudes. Could research extent of foreign holiday-taking in regular domestic survey. Establish correlation between travel and perceptions
			Enhance social tourism programmes	No baseline			Aggregate of programme-specific targets – programmes to be developed under domestic tourism actions
7. To position South Africa as a globally recognised tourism destination brand	**Showcase South Africa as a distinctive brand, and communicate this to markets** **Potential tourists and competitors**	South African tourism brand awareness levels in core markets Conversion rate (sales)	Leverage the 2010 World Cup publicity and successes to create lasting images of South Africa with potential tourists	Impact of 2010 World Cup SAT's 2010 GCS			Enhancing marketing and establishing lasting positive images of our destination

Theme 3: Sustainability and good governance

Objective	Focus	Measures and targets	More detail	2009 baseline	2015 target	2020 target	Growth/change rationale
8. To achieve transformation within the tourism sector	**Increase the number of tourism industry companies with broad-based black economic empowerment (BBBEE) ratings**	Increase in number of companies with a BBBEE scorecard	Conduct baseline research to determine current numbers and levels of accredited tourism companies – new research being done by the Tourism Empowerment Council of South Africa (TECSA) on 2009, due next year, may need to be expanded	No baseline			Baseline research needed to determine targets
		Increase in number of companies accredited at higher levels as per gazetted tourism sector codes, and decrease number of companies accredited at lower levels		No baseline			
	Increase the number of tourism industry companies reaching tourism charter targets	By type of company and scorecard category by the target year, namely 2012		No baseline	70% of tourism charter 2012/2017 target		2007 study indicates average improvement of 2,2–6,6% in one year Will pursue a 5% improvement per year over six years
	Increase the number of black	Number of black-owned tourism	Track by small, medium and large	No baseline Tourism charter targets			Baseline research needed to determine targets

Objective	Focus	Measures and targets	More detail	2009 baseline	2015 target	2020 target	Growth/change rationale
	majority-owned companies in the tourism industry	businesses	enterprises				
9. To address the issue of geographic, seasonal and rural spread	**Increase geographic spread**	Increase in the number of visitors and bed nights spent by tourists	Share of foreign bed nights spent: Split by paid accommodation and unpaid accommodation	Share of bed nights Least visited 2009 (North West and Northern Cape): 3,8 %	5%	10%	
				Mid-level visited 2009 (Mpumalanga, Eastern Cape, Limpopo, Free State): 22,7%	30%	35%	
			Total domestic bed nights	128,4 m (14% fewer compared to 2008)	20%	34%	
	Increase the levels of tourism to rural areas	Increase in the number of visitors and bed nights spent by tourists in rural areas	Domestic and foreign tourist arrivals and bed nights in rural areas. 'Rural' will be carefully defined based on the National Rural Development Strategy.	No baseline			Baseline research is needed. This could be added to the current standard SAT surveys. Could be linked to growth in niche market segments, e.g. birdwatching, backpackers, etc.

Objective	Focus	Measures and targets	More detail	2009 baseline	2015 target	2020 target	Growth/change rationale
		Increase in the supply of rural tourism products that achieve acceptable patronage and revenue levels	Rural tourism consumption	Use business registration to develop a baseline and track levels of rural product development and sustainability			Links up with the thrust for coordinated product development. Another measure is successful grant applications.
	Decrease seasonality	Improvement in the seasonality index of all foreign arrivals, as measured by SAT (since 2001)		1,13%	1%	0,5%	
		Increase in share of bed nights spent in the low-season months	Foreign bed nights	15,8%	21,1%	25%	
			Domestic bed nights	5,3%	7,1%	10%	
10. To promote 'responsible tourism' practices within the sector	**Visible and accountable responsible tourism**	Increase in number of tourism programmes and projects led by and benefiting communities	Ownership, employment and shareholding	No baseline			Baseline research needed to determine targets
		Increase in number of tourism businesses incorporating 'responsible tourism' management and	Adherence to 'responsible tourism' standards: Cape Town Declaration	No baseline			Baseline research needed to determine targets

Objective	Focus	Measures and targets	More detail	2009 baseline	2015 target	2020 target	Growth/change rationale
		practices					
11. To unlock tourism economic development at provincial and local government level	**Recognising the multi-stakeholder process in the local governance of tourism**	Systems for provincial and local government tourism support	Incorporate NTSS targets into Integrated Development Plans (IDPs) and local economic development (LED) strategies	No baseline			Provincial and local government development and economic plans should reflect that tourism has been duly considered.
		Ensuring support for local government tourism programmes and capacity	Initiate and/or support the initiation of tourism focus areas and tourism development programmes	No baseline			Research on tourism performance in a sample of local government areas and promote investment where there is potential

3.3 Strategic clusters and thrusts

Through the consultative process, various strategic thrusts have been identified to address the objectives and goals for the tourism industry. However, not everything can be achieved at the same time, and a process of prioritisation and clustering was therefore undertaken to identify those focus areas that need priority attention in the NTSS implementation. The strategic thrusts were prioritised based on the extent to which they address the issues raised in the ANC manifesto, the MTSF and the strategic objectives, and the number of workshops and roadshows in which they had been put forward for consideration. Some of the strategic thrusts may also serve as activators for others: Research on one strategic thrust may, for example, activate the implementation of another strategic thrust, particularly in marketing and the development of new markets.

CLUSTER 1: Policy, strategy, regulations, governance, and monitoring and evaluation

1. Research, information and knowledge management
2. Policy and legislative framework
3. Collaborative partnerships
4. Prioritising tourism at national, provincial and local government level

CLUSTER 2.1: Tourism growth and development – demand

1. Marketing and brand management
2. Domestic tourism
3. Regional tourism
4. Business and events tourism

CLUSTER 2.2: Tourism growth and development – supply

1. Relevant capacity building
2. Niche-product development and rural tourism
3. Product information
4. Responsible tourism
5. Investment promotion
6. Quality assurance

CLUSTER 3: People development

1. Transformation
2. Decent work
3. Service excellence
4. Community beneficiation

CLUSTER 4: Enablers of growth

1. General tourism awareness among South Africans
2. Safety and security
3. International and regional airlift
4. Ground transportation
5. Domestic airlift

4. Cluster actions

Action plans, containing a problem statement and high-level actions, have been developed for each of the strategic thrusts. The proposed action plans were derived from the many existing strategies developed within various sectors of the industry or by the NDT over the last few years; the various stakeholder workshops; input from the panel of experts, as well as recommendations and ideas from other parties with an interest or concern with tourism.

Wherever possible, a programmatic approach should be used to implement the various action plans. Each plan's high-level actions are divided into main actions, which should be seriously considered in the implementation of the NTSS, as well as sub-actions, which are possible steps or ideas on how the main actions may be implemented. The sub-actions will be further refined in the programme development phase, by the responsible entities, as required for implementation.

CLUSTER 1: Policy, strategy, regulations, governance, and monitoring and evaluation

1.1 Research, information and knowledge management

Overview

Though significant progress has been made in tourism research and information since 1994, there are still some shortcomings. In particular, there is no national research framework to guide tourism-related research conducted in the country by the national government, academic institutions, provinces, destinations and the private sector. Therefore, existing research often fails to address the needs of industry stakeholders. A lack of collaboration also results in a duplication of efforts and resources.

One of the key issues relating to tourism research is the lack of a proper database of tourism businesses operating in South Africa. Such a database would enable an understanding of the industry's capacity and of basic performance or demand levels. In particular, decision making in government is often based on inaccurate baseline information. In addition, businesses do not have ready access to relevant market intelligence to inform their investment decisions. Finally, the research and knowledge management tools to monitor the implementation of strategies and interventions by government are either lacking or misapplied.

Actions to address the issue

Action	Sub-actions
Enhance the capacity of the research and knowledge management unit in the NDT to enable it to coordinate and guide tourism-related research	Through consultation, develop a strategic framework for tourism research and knowledge management in South Africa, to be coordinated by the research unit in the NDT, which will meet the needs of all major stakeholders in tourism, and will provide academic institutions and others with topics on which to do relevant research. This will include a review of tourism concepts; a review of existing research to ensure effectiveness; a review of possible research gaps; planning for new, relevant research; accessibility and use of information by all parties, etc.
	Collaborate with the aviation sector on data provision and analysis, to share market information intelligence and to identify new or unconventional markets
	Establish a platform for the broad environmental analysis of tourism trends globally and in South Africa. Ensure that effective mechanisms are in place to allow relevant stakeholders to use the TSA framework to collate data needed for research, to provide information on research undertaken, to access research reports on a 'user pays' basis, and to use it as a baseline for future research.
Develop a database of all tourism assets, and explore mechanisms and ways of promoting the registration of tourism businesses in South Africa to gather information on supply in the industry	Develop a framework for the registration of tourism businesses
	Identify the role of provincial tourism agencies, local government and industry organisations in implementing the mechanisms to promote the registration of tourism businesses in South Africa
	Design a database and related web collection and dissemination sites. Ensure that these allow access to track progress against objectives and indicators.
Finalise the e-library as a platform for storing national tourism and tourism-related research, and manage it on an ongoing basis	Collaborate with the academic institutions to investigate the consolidation of existing e-databases to eliminate cost duplication
Implement electronic and other means of determining passenger movements in	Set up a working group with Home Affairs, Statistics South Africa (Stats SA), NDT, SAT and industry representatives to develop and institute a proposal for departure forms, clearly describing the data that are to be captured, the method of capturing, ownership of the data, and use and accessibility of data

Action	Sub-actions
partnership with other stakeholders	
Develop a national web-based and/or mobile/cell-based system for visitors to complete visitor satisfaction forms at various locations (also see "Quality assurance")	Investigate and promote the development of an industry customer feedback system. Cover aspects such as ownership and operation of the system, possible sponsorships, incentives, etc.
Track industry competitiveness	Develop and compare benchmarks/average pricing models of other competitor destinations Implement recommendations of the GCS conducted in 2003/4 and 2009
	Track the WEF's travel and tourism industry competitiveness index, and develop action plans to improve relevant sections of the index
Develop a tourism index to monitor the overall performance of the industry on an ongoing basis	Define and structure an index, with relevant composite indices and panel inputs

1.2 Policy and legislative framework

Overview

Whereas the White Paper on the Development and Promotion of Tourism of 1996 constitutes an overarching policy framework for tourism development and promotion in South Africa, the Tourism Act of 1993 provides the legislative framework for the promotion of tourism. In its current form, however, the Act does not support the implementation of the White Paper as broader policy framework, as its main objectives are marketing and tourist guide regulation. The Act also predates the Constitution of the Republic, and had not necessarily been aligned with constitutional objectives. Although some progress has been made in the implementation of the White Paper, this has not been properly monitored. Policies in different spheres of government are also misaligned, and tourism is poorly integrated with the development of other sectoral policies.

Actions to address the issue

Action	Sub-actions
Create a legislative and regulatory environment for tourism development and promotion	Identify policy and legislative impediments, and develop appropriate interventions
	Embark on an advocacy and awareness campaign on policies, legislation and regulations, targeting all key stakeholders and sector departments
	Conduct periodic policy and regulatory reviews in consultation with stakeholders to establish gaps and international best practices
	Investigate mechanisms for creating sufficient policy, legislative and analytical capacity, targeting tourism officials in provinces and local government
Develop measures to ensure tourism resilience and crisis management	Develop a tourism crisis management framework Develop a tourism resilience strategy

1.3 Collaborative partnerships

Overview

The tourism industry cannot exist without partnerships and collaboration. Visitors are looking for a great experience, which can only be achieved if the various tourism partners work together. Sound partnerships form the basis of any successful tourism industry. These partnerships include the public sector, the private sector and communities.

Despite some examples of strong partnerships, there is often a lack of communication and collaboration among different sub-sectors of the private sector; among the different spheres of government responsible for tourism, and between dedicated government tourism entities and the various government entities that have an impact on the tourism industry. In many cases, organisations are involved in similar activities within the tourism industry, but do not cooperate to strengthen the impact of their collective activities [e.g. tourism development agencies and non-governmental organisations (NGOs)].

At national level, the interaction between the public and the private sector is reasonably good, with open communication lines, but this is often not the case at provincial and local level, where the relationship between the public and private sector is often strained or dysfunctional. Furthermore, the relationships between both the public and private sectors and communities are ad hoc and fragmented, and the industry needs to communicate and involve communities in a more proactive manner.

Actions to address the issue

Action	Sub-actions
Formalise structures for collaboration and interaction between the public and private sector at national and provincial government level	Investigate the possibility of repeating the existing Tourism Business Council of South Africa (TBCSA) national structure at provincial level and in major cities, and single tourism forums at town or district/local level
Develop a clear framework within which all appropriate roles and areas of responsibility are clearly spelled out for all tiers of government	Establish an intergovernmental and stakeholder engagement framework, which provides for the establishment of a delivery forum
Encourage the development of private-sector communication forums/associations or mechanisms that facilitate communication between the different sub-sectors of the tourism industry	Establish an intergovernmental and stakeholder engagement framework, which provides for the establishment of a delivery forum

1.4 Prioritising tourism at national, provincial and local government level

Overview

While government has recognised tourism as an important sector, this does not filter down to planning, budgets and actions across all government departments and levels. As the tourism industry is complex and influenced by multiple sectors, many of the areas that are to be addressed to improve the performance of the tourism industry are not directly within the Ministry and NDT's control. It is therefore crucial that the profile of the tourism industry is raised at national government level and within Parliament, to ensure that the relevant national government departments understand its importance and impact, and cooperate and assist where necessary, with relevant budget allocations that take the development requirements of the tourism industry into account. General coordination needs to be improved between the NDT and other departments that have an impact on tourism, to ensure that they consider tourism when developing and implementing their own strategies and actions.

Actions to address the issue

Action	Sub-actions
Raise the profile of the tourism industry within Parliament and Cabinet	Raise awareness and understanding of the tourism industry within Cabinet, the National Assembly's portfolio and select committees, and the National Council of Provinces
	Engage the newly established National Planning Commission within the Presidency to ensure that the complexities of the tourism industry, and how these relate to other planning issues, are understood. Ensure that tourism is represented within the Commission.
	Raise awareness and understanding of tourism with the relevant representatives in the MINMEC, the MIPTECH (the interprovincial tourism technical committee of provincial and national officials) and the South African Local Government Association (SALGA)
Engage all other ministries that have an impact on tourism	Develop bilateral relations with other ministries that have an impact on tourism. Regular communication channels should be developed and maintained between these ministries and the Ministry of Tourism to ensure ongoing communication on tourism-related activities and actions.

CLUSTER 2.1: Tourism growth and development – demand

2.1.1 Marketing and brand management

Overview

SAT has made progress in its targeted international marketing efforts, and some of their campaigns have won awards internationally. More investment is needed in this area to improve the country's competitiveness even further.

The international brand alignment proposed by the International Marketing Council in 2008 needs to be more widely implemented throughout South Africa, through all spheres of government as well as within the private sector. This will help generate a wider reach for, and more effective use of, resources. Furthermore, SAT needs to stay abreast of the increasing technological developments and trends in the field of tourism marketing and messaging, in order to ensure that its marketing efforts have the greatest impact.

Also, SAT has a very specific interpretation of its mandate, which excludes the marketing of niche tourism. In addition, to some extent due to product and budget constraints, the targeted markets have not been expanded geographically or by economic level. An effort should therefore be made to develop new markets, instead of purely focusing on existing ones. This will include enhanced marketing of tourism products in rural areas.

According to the marketing model based on the portfolio-market review, which is conducted by SAT, portfolio markets with fewer than 20 000 foreign visitors to South Africa are not considered core or investment markets. However, the reasons why these foreigners choose not to travel to South Africa may not necessarily be understood per individual market, and it therefore remains important that these markets are also considered in the future, with proper research on their potential. It is also evident that, over the years, emerging economies, such as India and China, have presented greater opportunities for tourism growth. This should also influence the marketing rationale, namely that tourism in South Africa needs to adopt both a defence and growth approach to marketing in order to balance volume and value.

Actions to address the issue

Action	Sub-actions
Build onto and finetune SAT marketing campaigns in core, investment, tactical and watchlist markets, in consultation with the industry	Review marketing campaigns, and include all provinces in discussions about joint marketing initiatives with international tour operators and airlines, to ensure that messages are aligned
Assess the effectiveness of the Indaba as a marketing platform for South Africa	Develop mechanisms aimed at growing and strengthening the Indaba as a tourism trade show
Develop a marketing strategy targeted at the African market	Facilitate the formulation of a regional/Africa tourism development framework
Review the current destination marketing situation in South Africa at provincial, city, district and local levels, and align the destination marketing efforts of the various spheres to ensure that destinations within South Africa do not compete, but complement one another in the international arena	Develop a marketing-roles guideline for all levels of destination marketing in South Africa (national, provincial, city, district and local). Review the activities of a sample of destination-marketing bodies, in particular those considered to be most effective, and investigate international best practices. Consult with all levels, and develop a marketing-roles template for each level, also indicating how the levels integrate. Include budget guidelines.
Drive the implementation of the South African tourism destination brand throughout the tourism industry	Advocate the importance of brand consistency throughout South Africa as a means of portraying a professional image of the country
Communicate the tourism destination brand, within the umbrella country brand, both in South Africa (to South African residents, companies and government organisations) as well as to the outside world	Strengthen relations and work with the International Marketing Council (IMC) to spread the utilisation of the brand to the general population and other related sectors and government
	Develop an MOU between the IMC and SAT that clearly indicates roles and responsibilities of all parties with regard to international marketing
Continuously keep at the forefront of, and utilise, the latest electronic information distribution and online/cell reservation systems	Ensure that the national online product database is comprehensive, regularly updated, and includes categorisation by experiences
Develop distribution systems for the domestic market	Review the existing domestic tourism marketing approach to accommodate all market segments

Action	Sub-actions
SAT to continue developing new markets and marketing strategies in partnership with NDT and the sector	Identify all potential new markets (or undeveloped markets) through research, including organised niche leisure markets, new geographical markets and new income/lifestyle markets that may be attracted to South Africa based on the existing or potential product offering. Include medical tourism, backpackers, beach charters, etc.
	Develop marketing campaigns to attract the identified markets. Use all media, including e-media. For niche markets, use events, interest groups and associations. Work with existing tourism operators who serve these markets.
	Develop mechanisms to maintain existing relations
	Pilot marketing in high-potential non-portfolio markets via diplomatic missions
	Invest in marketing in emerging markets
	Develop a market intelligence capacity to track the performance of the traditional international markets
	Maintain brand positioning in the traditional markets

2.1.2 Domestic tourism

Overview

In most successful tourism destinations around the world, the domestic market forms the backbone of the tourism industry. This should become a strategic choice that is informed by the extent of this market's potential and the budgeted return on investment. In South Africa, many South Africans had not had an opportunity to undertake holiday travel within their own country because of the apartheid history. That is why most South Africans, mainly black Africans, have no travel culture. Currently, the dominant purpose for travel is visiting friends and relatives (VFR), where spending is often lower compared to domestic holiday travel. SAT's approach is to create a culture of travel, focusing on the young and upcoming, as they constitute a lucrative market segment. A portion of the domestic market also travels overseas or elsewhere on the continent, and could be attracted to support the South African tourism industry and to travel within the country. There is a need for a broader mass-based domestic campaign that targets all, regardless of gender, age or race, and this will require more partnerships and cooperative marketing.

Although general tourism awareness will assist in developing the domestic tourism market, in general, domestic tourism development requires attention to broader marketing, product development, distribution, information provision, and possible social tourism programmes. Marketing should be stepped up to improve awareness and access to information. In some cases, existing tourism products also do not specifically meet the needs and requirements of particular market segments (e.g. the emerging black market), and will require the development of new and customised products.

The NDT will have to develop a domestic tourism strategy to address the following:

- Limited growth
- Broadening the strategies also to target the lower and higher end of the market, as the Sho't Left campaign is only targeted at the middle market
- Limited geographic spread
- Reduction in seasonality
- Affordability of travel
- Creation of a holiday culture, especially among previously disadvantaged groups
- Limited diversity of products and services
- Access to travel information
- Linking the domestic tourism strategy with a social tourism programme to make travel affordable to the majority of South Africans
- Contingency plans for unexpected crises

Actions to address the issue

Action	Sub-actions
Develop a domestic tourism growth strategy	Conduct feasibility studies to identify the most viable options that will ensure the growth of domestic tourism
	Investigate models of parks in selected countries; analyse frameworks on inclusive ownership, and research the historical establishment of government-owned resorts in South Africa, in order to encourage holidaying among all South Africans
	Identify all existing municipal and other government-owned resorts that are not being optimally used as well as other underutilised government properties, to determine whether they may be developed into resorts targeted at 'new' travellers at the middle LSM levels
	Ensure that the operators engage the relevant transport operators to provide (inclusive and independent) transport from key source markets to the relevant resorts
Market domestic leisure tourism to all major local markets	Analyse existing domestic research, and conduct additional research if gaps are identified, to inform the domestic marketing strategy, including all income/LSM groups above level 3. Include competitor activity of South African residents travelling to other countries. Refine or update the domestic market segmentation, as required.
	Develop a comprehensive domestic tourism marketing strategy that covers all major markets and matches up markets and products/experiences
	Provide incentives to the industry to target the domestic tourism market
	Include access and distribution as core elements of the strategy, and develop a comprehensive website aimed at the domestic holidaymaker. Engage the existing distribution channels to handle and promote domestic tourism.
	Refine and improve the Sho't Left campaign to be more effective
	Develop other marketing campaigns targeted at market segments other than those targeted by Sho't Left, e.g. school tours, township tourism, sports tours, etc.
Encourage and support low-income South Africans, who take limited or no holidays, to travel domestically	Investigate ways of motivating and providing affordable tourism products and packages to encourage low to medium-income earners to take holidays

Action	Sub-actions
for leisure purposes	Develop strategies to work with banks, loyalty programmes, stokvels, churches, unions and other groups to encourage saving towards holidays, promote the use/application of savings to buy holidays, and motivate South Africans to save for their holidays
	Explore the possibility of a fund that is to be contributed to as a corporate social investment (CSI) recognised by the tourism and other BBBEE codes

2.1.3 Regional tourism

Overview

Though the African continent accounts for most foreign arrivals in South Africa, the tourism industry does not clearly understand the opportunities provided by the various source markets on the continent. Many African visitors stay for a short period of time, and the challenge is to entice them to stay longer and spend more. Challenges in attracting the African markets include visas and air access, which are respectively very expensive and not frequent enough. For many African visitors, the primary reason for their visit is personal or trade shopping. To them, another specific challenge is inadequate storage facilities for their goods prior to departure. There are limited or no existing links between the retail and wholesale trade and the tourism industry to work together to maximise shopping visitation and spending by African tourists.

Tourism knows no boundaries. Tourists to the region would want to have an integrated regional experience. This calls for greater levels of cooperation and partnerships with industry and government counterparts, across our borders in particular, and within the Southern African Development Community (SADC) region in general.

Actions to address the issue

Action	Sub-actions
Expand the impact of travellers from our neighbouring countries on our tourism industry, and develop other African markets	Continue to conduct market research to understand the needs and requirements of travellers from neighbouring countries, and identify the various issues inhibiting growth from these markets (e.g. airlines, visas, etc.) in consultation with the relevant stakeholders
Investigate ways to stimulate and simplify trading and shopping tourism by visitors from the continent	Create a working group with the Department of Trade and Industry (dti), the tourism industry and the retail industry to develop and implement a strategy to maximise trading and shopping tourism in partnership with key cities that could attract this spend, e.g. Nelspruit, Johannesburg, Ficksburg, Musina, Mmabatho and Bloemfontein. Consider initiatives such as shopping festivals, retail promotions in neighbouring countries, and transport and access facilitation.
Develop partnerships with South African companies doing business in other African countries to link up with their marketing, where applicable, or to conduct joint marketing campaigns	Develop a framework for joint marketing agreements with South African companies doing business in Africa
Create conditions to promote 'Destination Southern Africa'	Facilitate easy travel across the sub-region, including transport, accommodation packages, etc.

2.1.4 Business and events tourism

Overview

South Africa has experienced the benefits of a number of large events – sporting and other – over the last few years, and the infrastructure created for the 2010 World Cup as well as the profiling of South Africa during the event have put the country in a very favourable position to attract other, future events. However, there is currently no coordinated effort at national level to attract international events. Different provinces and cities within South Africa are competing with one another to secure events business, thereby limiting South Africa's ability to attract more events as a country.

Events can be used effectively to draw visitors to a destination that may not have been considered otherwise, and may also be used to improve the seasonal and geographic spread of tourism within South Africa.

Actions to address the issue

Action	Sub-actions
Establish a national conventions bureau (NCB) responsible for business events, coordination and support for bids, and develop and roll out a significant business tourism and events strategy	Establish and develop a business plan for the NCB in consultation with SAT, provinces and other stakeholders. Such strategy and plan should also address seasonality and geographical differentiation/spread, leveraging the 2010 infrastructure and profile; coordinating existing events marketing at different levels; developing and promoting existing as well as new events, and ensuring a fit between targeted events and the destination at both country and city level.
	Identify at least one event in each province as a flagship event that represents the provincial experience, and grow the importance of this event
	Establish similar structures for provinces and local governments to follow, in order to market and support business tourism and events, and, where applicable, support local conventions bureaux
Investigate and implement the establishment of a bidding fund that may be used to support bids for events of national importance	Benchmark international monetary bid support, and develop a proposal to create a bidding fund, stipulating fund governance, controls and criteria, which are then to be implemented
Strengthen the current accreditation of professional conference organisers (PCOs) in collaboration with the industry to ensure their credibility and accessibility to all	Create awareness of PCO accreditation, and promote the utilisation of PCOs for all government and industry events

CLUSTER 2.2: Tourism growth and development – supply

2.2.1 Relevant capacity building

Overview

The tourism industry relies on people to deliver the core of the tourist's experience. At present, however, the industry does not attract quality people of all skills levels, and fails to retain quality people, due to, among others, generally poor training and development, career progression and salary levels. THETA (the Tourism, Hospitality and Sports Education and Training Authority) is largely perceived as ineffective, as it does not assist the industry as best it could in developing people.

The urgent need for skills development in the tourism industry in South Africa was illustrated by the skills audit of the tourism and sports industries carried out in 2007. Subsequently, a human resources development strategy was developed. This strategy now has to be implemented in order to build and improve the skills base in the tourism industry. One of the critical issues is the fact that matriculants do not perceive the tourism industry as an attractive profession, and, therefore, the industry does not attract top-quality students. Another critical area is the skills levels of supervisors and managers in the industry.

The White Paper on the Development and Promotion of Tourism of 1996 states that tourism is driven by the private sector and firmly based in local communities. Local governments influence tourism products in how they manage their socio-economic environment and how they provide services to their communities. Despite tourism's significance, though, local governments have few dedicated or part-time tourism personnel; experience and knowledge of tourism are extremely limited, and, with rare exceptions, no budget is allocated for tourism planning and development activities. The entrenched belief that the Department of Cooperative Governance and Traditional Affairs (COGTA) inherited from the former national department responsible for local government is that there is no need to plan or budget for tourism support. Therefore, capacity building for tourism is critical to improve the overall planning for, and management of, South Africa's tourism industry.

Actions to address the issue

Action	Sub-actions
Engage SALGA, National Treasury and COGTA to ensure that a comprehensive framework is developed for tourism activity at local level, including ensuring that relevant local municipalities allocate a budget for tourism	Enhance and monitor the implementation of the South African local government tourism toolkit
	Conduct an audit of the current skills levels of tourism officials within relevant local governments, and develop and roll out training programmes targeted at local government officials to address any skills gaps and shortages identified. Include the local government tourism planning toolkit.
	Roll out tourism awareness and training programmes among all local government councillors and management members in the relevant municipalities
Within the municipal tourism framework, ensure that tourism is an important criterion in infrastructure development planning, particularly in rural and peri-urban areas	Engage SALGA and COGTA to introduce tourism development as one of the factors to consider when an infrastructure project is included in a municipality's IDP
	Identify key infrastructure projects in relevant municipalities that could assist in the development of tourism, and liaise with relevant responsible agencies to prioritise these projects (e.g. current study on harbours)
	Develop mechanisms to encourage membership of local tourism organisations
Improve THETA's effectiveness	Develop a THETA turnaround strategy that is industry-driven and addresses people development in consultation with the Department of Higher Education as well as industry
Finetune, manage and implement the human resource development strategy	Review and accelerate the implementation of the tourism human resource development strategy in partnership with all relevant stakeholders
	Engage associations to promote formal training, improve the quality of the people working in the industry, and ensure an increased intake of tourism graduates

Action	Sub-actions
	Facilitate the roll-out of a countrywide customer relations training programme for all travel and tourism employees. Build on the SA Host and Welcome Host campaigns, but ensure consistency and a unified brand or approach to avoid confusion. (Also see “Service excellence” under cluster 3)
Improve matriculants’ perceptions of a career in the tourism industry	Broaden the extent of tourism as a subject in schools – expand to more schools, including junior schools; use experiential elements (tours and trips) and role play; incorporate into Life Skills Orientation curriculum; use as case studies in Business Studies, Accounting, etc.
	Investigate a leadership/apprentice process, which is to be linked to the current learnership programme, to develop recognised careers in the industry with formal professional development over a number of years

2.2.2 Niche-product development and rural tourism

Overview

Tourism product development is currently mainly driven by the private sector, with some efforts by national, provincial and local governments, though these have been largely unsuccessful. There is no coordination from a national level to ensure alignment between the marketing promises made at national level, and actual product development. Often, neighbouring municipalities or provinces plan to develop very similar experiences within their areas, but lose sight of the fact that their product offering can be improved through coordination with others. Tourism does not follow political boundaries.

Furthermore, there are a number of rural areas within South Africa that have the potential to be turned into tourism destinations, but many of these are not being developed. Such areas present opportunities to develop new and different tourism products to address the changing requirements of the market – hence the need also to recognise rural tourism as an element or part of the niche-product development.

Poor quality, poor management and the lack of maintenance of cultural and heritage attractions often detract from visitors’ experience, and also damage the image of our destination.

Actions to address the issue

Action	Sub-actions
Identify, at national level, the existing and potential tourism experiences available in South Africa, also considering geographical location within South Africa	Analyse and review both domestic and international tourism experiences and product trends
Develop a spatial tourism product and experience development strategy for niche markets	Review spatial development initiatives (SDIs), priority areas for tourism infrastructure investment (PATIIs) and provincial plans, and develop a revised national tourism master plan as guideline for provinces, municipalities and the private sector to develop products and experiences that would improve and expand the current offering, utilise new high-potential tourism areas, and meet domestic and foreign market needs Include accommodation, tourism activities and attractions that could combine to create satisfying tourist experiences. Develop, in consultation with stakeholders, a marketing framework aimed at niche markets.
	Communicate and implement the spatial tourism product and experience development strategy in partnership with provinces, municipalities and the industry
	Provide an opportunity for the private sector, who deals with the market directly, to encourage investment
Implement the recommendations of the cruise tourism impact study	

2.2.3 Product information

Overview

The provision of tourism information in South Africa is uncoordinated and inconsistent, with some areas doing a reasonable job, while others – often where the local information office is staffed by government officials – are totally dysfunctional. Information distribution via the web, call centres, walk-in centres and push technology (a service in which the user downloads software from a provider, which then continually supplies information from the Internet in categories selected by the user) is fragmented and of inconsistent quality. Even where there is good, up-to-date, coordinated information provision for a certain destination, there is no overarching, national framework that enables people (locals or foreigners) to find out everything they want to know about travel options in multiple possible destinations in the country, hassle-free.

Actions to address the issue

Action	Sub-actions
Develop and implement a national structure for tourism information provision, which covers information provision on all South African tourism products/experiences in all gateways, provinces and major cities, and relevant information provision in municipalities (where appropriate). Ensure that this structure has a central electronic database as its foundation.	Research international and local best practice (including 2010 World Cup initiatives), and design structures to accommodate different levels of accredited, uniformly branded information centres (could be virtual; exclusively for information provision; add-ons to another function; travel agent, petrol station, private, public or a combination)
	Develop tourism signage permissions and standards, including the use and ownership of the i-sign
	Investigate the role and responsibilities of local government in developing and managing tourist information centres

Action	Sub-actions
Develop accredited qualifications and training for tourism information officials	Develop training materials for tourism information officials, and provide standardised training across South Africa, ensuring that officials obtain knowledge about the entire country and not just their own area or province, as well as acquire a recognised qualification
	Universities and schools are to engage information centres to provide internships for students in tourism information offices.

2.2.4 Responsible tourism

Overview

South Africa's natural environment is one of its greatest tourism resources, and, therefore, the tourism industry needs to be actively involved in conserving and protecting it. Visitors – both domestic and international – could be encouraged to participate in the protection and conservation of South Africa's natural environment, and to enjoy a responsible travel experience while in South Africa, helping the various tourism businesses in the country to achieve the triple bottom-line, namely economic growth, ecological sustainability and social responsibility.

Climate change and global warming are high on the world agenda, and the tourism industry is under threat due to travel's high carbon emissions and people's propensity to avoid travel because of it. Therefore, South Africa's tourism industry must be seen to be minimising environmental damage to counteract the possible, negative perceptions of environmentally conscious travellers.

Actions to address the issue

Action	Sub-actions
Develop and implement a programme to set, adhere to and measure attainment of 'responsible tourism' standards	Finalise and implement the national minimum standards for responsible tourism Promote the sector's adherence to constitutional principles and values, including race, age, gender, etc. Support the Red Card Campaign relating to child protection

Action	Sub-actions
	Conduct research on the current implementation of 'responsible tourism' measures, and promote awareness among tourism businesses
	Encourage tourism marketing organisations to include messages about 'responsible tourism' issues
	Develop universal access standards for the tourism sector
	Develop training programmes and funding mechanisms specifically aimed at green issues and products within the tourism industry, including all sub-sectors
	Develop and implement a voluntary accord within the tourism industry to reduce its carbon footprint in relative terms, and monitor this on an ongoing basis
	Facilitate the implementation of environmentally responsible practices within the tourism transport sector
	Work with investment facilitation entities/organisations to encourage the development of 'green buildings' for new developments
	Engage relevant stakeholders to facilitate funding for energy-efficiency conversions or renewable-energy projects in the hospitality sector
Promote South Africa's 'responsible tourism' practices regionally and internationally	Participate in and influence global forums and initiatives on environmentally responsible tourism
	Develop indicators for progress in the field of environmentally responsible tourism, and report on these indicators in the relevant forums

2.2.5 Investment promotion

Overview

Many South Africans want to start, or try to start, small tourism businesses, providing either accommodation (such as bed-and-breakfasts) or tourism services (such as tour operators and tour guides). However, there are various issues involved in starting and growing a tourism business, and, in many instances, a lack of access to finance is blamed as the sole reason for businesses not succeeding in this industry. This is not always the case, as the following issues also play a role:

- The quality of business concepts, which often lack proper planning and market analysis
- Insufficient business experience of the entrepreneur, as well as a lack of support structures to assist him/her to succeed
- Insufficient personal equity to fund the business, which becomes problematic, as many tourism businesses' revenues do not support large proportions of debt funding

In addition to the above, the commercial banks regard the tourism sector as risky and unattractive due to the relatively small scale of business loans in this sector. The tourism industry also has no access to venture capital with an appetite for risk and that could be utilised to fund projects that are unattractive to banks.

Incentives that have been put in place to encourage tourism investment are difficult to access, and have very complex application procedures. Also, certain required procedures, such as environmental impact assessments and rezoning, are often cumbersome and filled with red tape, which further limits tourism investment.

Though tourism investment opportunities are being promoted by various provinces, tourism investment promotion at a national level is insufficient to drive the national tourism development agenda.

Actions to address the issue

Action	Sub-actions
Rationalise, simplify and improve the systems of entrepreneurial support for new tourism small, medium and micro-enterprise (SMME) investors. Consider a one-stop shop system, coordinated nationally, with accredited 'shops' in each province to provide support to businesses throughout their life cycle, i.e. from start-ups to expanding and established businesses	Review the various investment and funding agencies that provide finance or entrepreneurial support to the tourism industry, and investigate how these could be rationalised. Include the provincial and local level, where applicable.

Establish a tourism funding model to help develop the tourism industry in line with the objectives of the national tourism strategy	Develop I tourism funding model that may be used to encourage development within the tourism industry. Consider centralising all currently available funds [dti, Development Bank of Southern Africa (DBSA), donor funding, etc.] into one entity.
	Include an equity-matching fund/venture capital for tourism entrepreneurs, i.e. new entrants who cannot raise capital or provide collateral. Develop criteria for accessing the fund, with links to mentoring/support services (provided by the one-stop shop), exit strategies and the like. Also consider how this aligns with the dti grant.
Investigate the reasons for the low success rate of public-private partnerships (PPPs) in the tourism industry, and develop an alternative approach	Determine through consultation why the currently available PPP investment models are not attractive to investors, and what needs to be done to change this.
	Develop a new approach to attracting investment in state-owned tourism assets, based on the above
Initiate intergovernmental rural tourism development programmes	Facilitate bilateral engagements with the Department of Rural Development and Land Reform to accelerate the settlement of outstanding land claims
	Engage other departments, provinces and local government on issues of tourism development
Streamline all investment support and enterprise development, including the Public Investment Corporation (PIC), PPP unit, Industrial Development Corporation (IDC), DBSA and dti	Lobby, educate and inform on the tourism fund and other initiatives, and on the needs of the tourism industry
Implement a plan to simplify the regulatory requirements for tourism businesses holistically, i.e. within all spheres of government	Based on the study on red tape in tourism, investigate how and where the regulatory environment could be simplified, and develop a programme to work with the relevant authorities at all levels to find ways to reduce or eliminate cumbersome processes. Particularly focus on relieving the regulatory burden on SMMEs.
	Consider possibly developing a standard set of bylaws for local government in respect of the tourism sector
Engage financing institutions to improve tourism businesses' access to finance	Launch an awareness campaign in financing institutions about tourism and what the business models in the industry entail

Engage the communications authorities to facilitate access to broadband internet connections and good-quality cellphone and other communications technology for the tourism industry, particularly in rural areas	

2.2.6 Quality assurance

Overview

The current quality assurance programme aimed at tourism accommodation and conference facilities needs to be expanded also to include other aspects of the industry. Additional standards need to be developed to cover tourism activities, attractions and services, where appropriate, and there should be a drive to implement the recently developed 'responsible tourism' standards in the industry. However, the extent of the costs associated with the implementation of standards should not prevent previously disadvantaged groups from entering the industry.

In addition, there are significant operational challenges related to the implementation of the tourism grading scheme – particularly the inconsistencies in the application of grading criteria as well as the issue of assessors being chosen by the establishment wishing to be graded.

Another aspect of quality assurance is universal access (i.e. making tourism accessible to those travellers with special needs, such as the elderly, people with disabilities, and children). Though the grading criterion is in place, the issue is often misunderstood, and very few establishments have been accredited/graded as universally accessible.

Actions to address the issue

Action	Sub-actions
Implement the recommendations in the KPMG review of the current grading scheme as soon as possible	Appoint full-time, in-house grading and master assessors
	Implement mystery-guest visits to supplement the grading assessments

Action	Sub-actions
	Ensure that the grading system has an effective customer feedback element, which is linked to the broader consumer feedback system for the industry (also see "Service excellence" under cluster 3)
	Engage the tourism industry to obtain their recommendations on the benefits ('carrots') that the grading scheme should offer to encourage more operators to participate in the scheme
	Increase the number of black businesses that are quality-assured
	Institute regular training and refresher courses for assessors
	Include universal accessibility as a criterion, with a specified rating within the normal grading criteria
Introduce a regular (three to five-yearly) review of the grading/quality assurance system	
Expand grading or other forms of quality assurance to other sub-sectors of the tourism industry, including restaurants, tour operators, transport operators and tourist attractions	Develop a grading or accreditation system for other sub-sectors of the industry. Take into account industry association certification, municipal and national licences and permissions required for private-sector initiatives and the like, as well as customer feedback on service excellence, and prioritise areas that need grading/accreditation.
	Ensure that universal accessibility criteria are included yet separately specified in all sub-sector grading schemes
	Develop a business plan for the roll-out of grading/accreditation to prioritised sub-sectors, including clear guidelines on the budget, institutional structures, governance and staff (master and grading assessors)
	Investigate alignment between the accreditation process for PCOs and the grading processes
Improve South Africans and visitors' awareness of the grading scheme in a coordinated fashion, aiming to eliminate confusion about the different types of accommodation, about what to expect at differently graded facilities, and about the use of the customer feedback system	Link to tourism information provision strategy and tourism awareness strategy
Investigate and develop frameworks aimed at legally requiring a greater degree of universal accessibility in new projects	Initiate the development of incentives for businesses to become universally accessible, and implement such incentives

CLUSTER 3: People development

3.1 Transformation

Overview

South Africa as a whole, and particularly the tourism industry, need to transform. Transformation is a critical success factor, without which the growth and development of the industry are not guaranteed. However, the rate of transformation in the tourism industry has been very slow, with few black entrants in the market, and big and small business still largely dominated by white people. Significant effort is required not only to transform existing businesses in the tourism industry, but also to grow the industry as a whole to allow for more mainstream black-owned businesses of all sizes to be established.

The tourism BBBEE code was gazetted in May 2009, and now places a legal responsibility on businesses in the tourism sector to comply. This creates a sense of urgency in respect of transformation in the tourism industry.

Actions to address the issue

Action	Sub-actions
Develop and implement strategies and programmes to promote businesses with a BBBEE scorecard and to encourage businesses to improve their scores and reach the tourism charter targets	Engage associations to promote transformation by implementing a BBBEE scorecard, and facilitate the implementation of the MOU entered into between TECSA and ten industry associations aimed at promoting industry compliance with transformation requirements
	Update a database of qualified black people, particularly black women, in management positions – utilise TECSA's 'Black Talent' database
	Facilitate partnerships with hotel groups and smaller establishments to support community-based tourism
	Promote diversity in tour operators' packages/excursions

Action	Sub-actions
	Develop an enforceable memorandum of agreement with all government departments at all levels to ensure that government procures from BEE-compliant tourism service providers only. Government should require all their existing tourism suppliers to obtain a BBBEE certificate or risk losing their supplier status.
Create a people development plan, including training, effectively to produce the required sector skills at all levels, but particularly management and entrepreneurship skills	Ascertain the level of skills demand in the sector Develop the required capacity in designated groups Consider the findings from the first GCS to inform the necessary actions
Develop and implement a tourism awareness campaign throughout South Africa	Develop the domestic tourism growth strategy Increase domestic tourism levels among the black population
Develop programmes to attract more black entrepreneurs to enter the industry and own and operate SMMEs throughout the sector, and provide support for such entrepreneurs	Develop and implement a formalised national mentorship programme for entrepreneurs in the tourism industry. Create a database and match up mentors and black SMME owners or aspiring entrepreneurs. Include corporate mentors and individuals who could assist entrepreneurs. Provide basic guidelines for mentors to follow. Showcase successful mentorship projects.
	Promote the concept of leisure or lifestyle entrepreneurs among the black community by profiling successful (small and medium) black or white-owned leisure entrepreneurial businesses in tourism
	Initiate and conclude agreements with travel trade, both locally and abroad, to incorporate black emerging entrepreneurs into their itineraries and service provider networks. Promote the marketing benefits.
	Identify and incorporate black-owned SMMEs into marketing campaigns and tourism enterprise partnership (TEP) programmes to ensure that they too derive benefits from marketing campaigns such as Sho't Left

Action	Sub-actions
	Develop and expand the speed marketing project to assist in linking black entrepreneurs with mainstream industry

3.2 Decent work

Overview

The tourism industry is not considered a good employer, as the wages are often quite low, the hours of work long and unusual, and real career progression opportunities few and far between. The industry's profile as a career choice is unfavourable, and students who are unable to qualify for professions such as law, engineering and medicine are often encouraged to enter the tourism industry as a second choice. This needs to improve if better skills are to be developed in the industry.

Decent work is also one of government's priorities, and the industry must therefore demonstrate to government that it is indeed a provider of decent work.

Actions to address the issue

Action	Sub-actions
Partner with the Department of Labour and other relevant organisations to encourage and ensure that tourism businesses comply with the principle of providing decent work	Review the existing research, legislative framework [existing Skills Development Act (SDA), Basic Conditions of Employment Act (BCEA) and other labour legislation] and the like to determine what is generally meant by 'decent work', and how this applies in the tourism industry. Specifically include definitions of occasional work and seasonal work in the tourism sector.
	Determine the current status of 'decent work' provision in the various tourism sub-sectors, as measured against the 'decent work' construct

Action	Sub-actions
	Examine the gaps between the current actual work scenario and the ideal scenario as outlined by the 'decent work' construct, and communicate the outcome of this analysis to the stakeholders in various sub-sectors
	Engage stakeholders in developing a clear plan of action to move from the current to the ideal scenario. The engagement should be focused on obtaining a clear and coordinated/defensible position from the sector.
	Communicate the plan of action to stakeholders, outlining their respective roles and responsibilities
	Include in the strategy the development of a toolkit/guide to help companies implement decent work as well as check whether they comply; the reinstatement of a travel and tourism industry wage benchmark survey to benchmark wages against other sectors in the country as well as internationally, and the implementation of an annual revision of prescribed/recommended wage bands
	Investigate incentives for excellent people development and decent work in the tourism sector
	Work with the Department of Labour to increase the policing of SDA and BCEA compliance
	Work with labour brokers and the Department of Labour to develop an accreditation/registration system for labour brokers who comply with the SDA, BCEA and/or 'decent work' codes
	Engage stakeholders to determine what would incentivise them to comply with 'decent work' (SDA, BCEA and other codes), and approach the relevant authorities to implement such incentives for the tourism industry. Also consider an incentive (similar to a learnership incentive) per employee who is converted from casual to permanent employment, to encourage skills development.
	Encourage participation in the Fair Trade in Tourism in Southern Africa (FTTSA) scheme, which measures fair employment practices, or develop an independent 'decent work' accreditation
	Monitor the tourism industry's progress in providing 'decent work'
Establish an MOU between the tourism industry, the Department of Labour, labour unions, tourism sector associations, the National Economic Development and Labour Council (NEDLAC), NDT and other relevant ministries (e.g. Economic Development, Planning) on what constitutes decent work in the tourism industry, with a code of conduct with which tourism industry businesses	Based on the above, work with labour broker associations/key labour brokers, also involving industry associations, to develop the MOU proposal, including a background explaining the importance of tourism and the strategy target of 800 000 jobs, and outline the strategy to improve industry compliance. Possibly include prescribed/suggested wage bands for the industry by job category, as well as agreed practices for labour brokers in the industry.
	Start discussions with relevant ministries and labour, and agree on the MOU

Action	Sub-actions
must comply	
Ongoing measures to attract and retain quality people and create careers in the industry	Facilitate the formulation of a people development and tourism awareness strategy. Include attracting matriculants to the industry; having tourism as a subject in schools; raising awareness of tourism; the importance of good customer service; tourism as a career; increasing the number of people in the industry, and guidelines for employers on performance appraisal and career progression.
	Conduct research to determine whether the provision of more 'decent work' in the tourism industry assists in attracting people to the industry

3.3 Service excellence

Overview

According to research done by the Disney Institute during their visit to South Africa in September and October 2009, service levels in South Africa are extremely inconsistent. This could be attributed to a variety of reasons, but, often, it is a case of poor leadership. Frontline staff members are not inspired to deliver quality service, because they are not given the reasons why excellent service is important; are not treated with respect, or given the responsibility to deliver a 'tourist experience'. South Africans are generally not keen to complain about poor service, but only voice their opinions to family and friends. Therefore, the people delivering the service often do not know that their service fell short of the desired standards. Poor service levels are not limited to the tourism industry alone, but are prevalent in other sectors of the economy as well. Service is important throughout the tourism value chain, including all service contact points (e.g. immigration, transport, accommodation and financial institutions).

Actions to address the issue

Action	Sub-actions
Conduct research and gather information to develop objective benchmarks for understanding service levels and service gaps to be addressed, and to monitor service	Develop a comprehensive baseline for customer service satisfaction in South Africa, covering key markets (domestic, African, intercontinental; leisure, business travel, business tourism) as well as the entire value chain, from booking and information provision to travel, accommodation and experiences

Action	Sub-actions
improvement	Based on the customer satisfaction research, publish an annual national tourism service index, similar to the Accenture or WEF indices
	Use information from the surveys to educate and train establishments and tour operators on where the service level gaps are, and jointly develop or refine strategies to address them
Develop service skills and attitudes in order to achieve sustainable changes in behaviour and create a service culture in the industry	Review and revise the SA/Welcome Host programmes to ensure that they incorporate appropriate behavioural changes as well as cover customer care for all major frontline job categories in the industry. Relaunch and rebrand a single campaign, with multiple elements if required, but within a single cohesive framework, and clearly linked to, yet differentiated from, the tourism awareness campaign to avoid confusion. Ensure that modules for supervisory and middle management are included.
	Engage with THETA to ensure that sufficient accredited trainers are available throughout the country to deliver service training programmes (also see "Relevant capacity building" under cluster 2.2)
	Develop a national service excellence framework, with clear standards and incentives applicable to both public and private sector
Create public awareness of world-class service standards among consumers, and encourage a culture of not accepting poor service	Introduce service excellence reality-television (TV) series and talk shows on both radio and TV
	Review all current awards that pertain to service levels, and determine if rationalisation is required
	Introduce national service excellence awards for individuals employed in the tourism industry. Use customer feedback and a voting system. Consider monthly and annual awards, where voting could possibly occur through a reality-TV programme, appointing an annual winner from the monthly winners. Solicit sponsorships.
Create awareness of the importance of customer care among industry employees	Introduce Service Excellence Month. Include awards, to be flighted on TV programmes or aired on radio.
	Introduce a (quarterly) service excellence newsletter
	Introduce industry employee awareness campaigns, such as "Go the extra mile with me" or "Great service begins with me", as part of the training and service commitment of employees
Measure and monitor service standards	Develop and introduce a South African mark-of-quality service that may be used by all South African companies providing great service to tourists

Action	Sub-actions
	Expand to other sub-sectors, and improve on the Tourism Grading Council of South Africa's (TGCSA) grading system, especially with respect to service, and link it to the customer feedback system (see below) and the mark of quality
	Repeat the customer satisfaction survey every year to monitor changes in service standards
	Develop and introduce a web-based self-assessment tool for service excellence
Develop an accessible, easy-to-use tourism consumer feedback system	Introduce a comprehensive, industry-wide customer feedback system that includes an SMS option, phone/fax numbers, an e-mail address and a website, to cleverly initiate focused feedback, both positive and negative. Ensure that feedback is channelled to the establishment for action and that the establishment does indeed respond to the customer, i.e. South Africa's version of TripAdvisor.

3.4 Community beneficiation

Overview

The growth of the tourism industry has not yielded genuine benefits for rural communities. Rural communities could benefit from and participate in the tourism industry, but their level of awareness of the industry and tourism skills are limited. Hence, some tourism investors and operators have taken advantage of the natural and cultural resources belonging to communities, without any benefits accruing to the communities themselves.

In some cases, unrealistic expectations have been created about the potential benefits of tourism, and the timeframe within which such benefits may be realised. When these promised benefits then do not materialise soon enough or at all, communities have sabotaged well-meaning operations. Finally, programmes led by the public sector to support community tourism initiatives have been supply-led. However, a low to non-existent market demand has resulted in failure to meet expectations and keep projects afloat.

On the one hand, the above issues have created reluctance among communities to consider tourism; on the other, many private-sector operators have reservations about community involvement in projects. This situation has resulted in a lack of progress in delivering tourism benefits to communities. Tourism awareness should be introduced at an early age, encouraging tourism at school level already. With greater knowledge and understanding of the sector, communities are more likely to protect and value tourism products operating in their areas as well as embrace foreign tourists who visit their areas instead of being hostile towards them.

Local government also has a role to play in providing leadership and the necessary planning to ensure that their communities and local businesses get the most out of tourism, and to minimise any negative effects. SALGA is already collecting best practices on successful community-based and community-benefiting tourism projects, and is documenting them to assist other communities.

Actions to address the issue

Action	Sub-actions
Improve local government's capacity for, and understanding of, tourism, specifically community-based tourism issues and opportunities, to enable them to provide realistic assistance to communities to maximise potential tourism opportunities	See "Relevant capacity building" under cluster 2.2, and budget for local government strategy. Identify successful community-based and community-benefiting tourism projects, and document them as case studies from which others may learn.
Build awareness and understanding of tourism among communities, particularly rural communities, to eliminate unrealistic expectations	Develop specific community campaigns through which tourism information could be disseminated and the community's understanding of tourism could be improved. Incorporate stories about tourism and tourism businesses as well as successful and unsuccessful community projects.
	Generate debate about community participation in tourism projects by providing examples and case studies of successful and unsuccessful projects
Identify destinations and areas where communities could become beneficiaries of tourism projects, and identify and support appropriate product development	Include community participation in a domestic-market resort group (see "Domestic tourism" under cluster 2.1) and consider communities swopping facilities, i.e. city communities hosting rural visitors for shopping and entertainment, while rural or coastal communities host city visitors for leisure holidays.
	Develop and implement a heritage and rural tourism development strategy
Develop and implement a comprehensive community beneficiation framework	Develop minimum criteria for community partnership projects in the tourism industry
	Identify the most appropriate institutional structures for tourism projects with community partnerships
	Develop funding criteria for entrepreneurial projects that benefit more people in the community than just

Action	Sub-actions
	the entrepreneur and his/her immediate family
	Develop sustainable funding models for community-based tourism projects

CLUSTER 4: Enablers of growth

4.1 General tourism awareness among South Africans

Overview

Many South Africans have limited exposure to and understanding of tourism, and, in many instances, have developed a negative perception of tourism as an exclusive activity for rich foreigners. However, tourism is an activity that everyone (above the lowest economic levels) could enjoy and participate in for an improved quality of life. In addition, many people indeed benefit directly or indirectly from all types of tourism activities, but are unaware of the impact that tourism benefits are having on them.

During their visit, tourists may come into contact with a variety of South Africans, and it is therefore also important for all South Africans, whether directly involved in the tourism industry or not, to be aware of and understand tourism, and the benefits it can generate if the industry grows. They need to be informed of how they could either enhance a tourist's experience or leave the tourist with a negative impression of the country. If residents of a particular area understand that tourism could create jobs and economic prosperity for their area, they will be compelled to treat visitors well and contribute to a world-class tourist experience.

Limited understanding and awareness of tourism in other economic sectors, such as the financial services sector, further hamper tourism businesses' ability to obtain funding. Furthermore, limited understanding of the industry within government often causes the tourism industry to be neglected when decisions are made on interventions that affect the industry (e.g. not prioritising the electrification of an area where there may not be many residents, but where tourism businesses could operate).

Even for tourism stakeholders, awareness is often limited to their own contact with the tourist, and they often lose sight of the tourist's broader South African experience and how they could assist in improving it.

Actions to address the issue

Action	Sub-actions
Develop, under the same brand, an advertising campaign rolled out across all media, both to encourage leisure travel in this country and demonstrate the economic benefits derived from tourism activity	Investigate sponsorships and other sources of funding, e.g. the Agency for International Development (AID), for the implementation of such campaign according to a national roll-out programme. Use trainers from different cultural backgrounds.
	Partner with academic and training institutions to tailor and implement training programmes throughout government, at all levels and to all employees
	Create awareness through campaigns, using appointed advertising agencies, the public broadcaster, radio stations, social media, etc.
Continue to develop tourism as a subject in schools	In line with the people development plan (to be developed; see "Transformation" under cluster 3)
Continue the Sho't Left campaign	Domestic tourism development (to be implemented; see "Domestic tourism" under cluster 2.1)
Develop a school-trip/tour programme and industry-employee holiday exchange programmes	Engage the Department of Basic Education to develop a school tour programme, possibly integrated with, for example, the curriculum for Life Orientation in the early high-school grades. Take into account any existing programmes; investigate funding from sponsorships/AID, and develop the programme.
	Develop an exchange programme where employees in enterprises within the industry visit another industry operator to experience holiday-making and/or visiting attractions. Use off-season and low-season periods, when both labour and capacity are available. Look for transport/funding sponsors.

4.2 Safety and security

Overview

Strong perceptions exist internationally that South Africa is an unsafe destination. Though the country has a real problem with crime and safety, the extent of crime incidents affecting tourists is insignificant, and all efforts must be made to address any incorrect perception in this regard proactively. Incorrect perceptions cause potential visitors to decide against visiting South Africa, resulting in significantly lower numbers of foreign visitors to our country. Also, the media tend to focus on negative stories only, ignoring the many positive stories that may boost the country's image.

In addition, there often is a lack of awareness of the important role that the South African Police Service (SAPS) and the judicial system could play in either promoting or harming South Africa's image as a great destination by the way in which they facilitate prosecutions in the case of actual crimes against tourists, and provide victim support.

Actions to address the issue

Action	Sub-actions
Develop and implement a major campaign to improve foreign source markets' perceptions of South African safety and security through concerted public relations management and information provision	Identify potential high-profile tourism safety ambassadors for South Africa from key source markets, and solicit public relations input from them
	Engage South Africans living abroad to improve the messages they spread about South Africa's safety and security image. Use stories of their holidays in South Africa, how they miss South Africa, and other upbeat perspectives to encourage positive messaging. Link this to the Homecoming Revolution, use The Good News, and leverage the successes of 2010. Use electronic media and other media platforms extensively.
	Implement safety as a grading element, working with SAPS and other security agencies

Action	Sub-actions
	Develop collateral and messages on safety, drawing comparisons between South Africa's safety and security indicators (such as the safety of our drinking water) and those of other destinations that will improve South Africa's image as a safe destination. Include an explanation of the economic and employment benefits that South Africa could derive from foreign tourism. Especially use the stories of new immigrants to South Africa from source markets as well as South African home-comers.
Finetune, manage and monitor the implementation of the tourism safety and security strategy	Review and implement the national tourism safety and awareness strategy in consultation with all relevant stakeholders
	Formalise relationships with the Tourism Safety Initiative (TSI)

4.3 International and regional airlift

Overview

If the flights into South Africa from various markets are lacking, or are expensive or inconvenient for potential visitors, it prohibits or deters tourists from visiting South Africa. Therefore, addressing the issue of international airlift between South Africa and key source markets, including African countries, is critical to achieve tourism objectives. The same applies to the challenges faced by the domestic tourism market due to the current limitations on the use of frequencies by national carrier flights, as well as the promotion of citizens' use of air transport within the country, mainly for holiday trips.

SAA has been commercialised, and, as such, trives to create a balance betweenbusiness and national interests. In so doing, it tourism does not always remain the priority.In 2006, Cabinet approved South Africa's Airlift strategy, which indicates that tourism should be the driving force behind enhancing the airlift capacity. Although there is no open-skies policy, it is essential that the 2006 Cabinet decision is upheld in the interest of creating adequate capacity for the core markets. It should be kept in mind that national carriers in many developed tourism destinations (e.g. Spain) and some new destinations (e.g. Dubai) are (or were) not run for financial return, but instead operated at a modest profit or cost to taxpayers in order to support the national interest.

Actions to address the issue

Action	Sub-actions
Consider South Africa's tourism access needs from a location perspective, and consider the core, investment, tactical, watchlist and new markets as well as South Africa's current and potential trade links	Conduct research on South Africa's international airlift needs and opportunities. Include a review of SAA and other carriers serving the country, benchmarking against other national airlift strategies and national carrier/flag carrier models; projections of air route capacities under different scenarios; budgets (cost to fiscus) for various options; economic benefits of options, and recommendations for the best national airlift strategy.
	Continuously work with the Department of Transport and the Airline Industry to ensure adequate supply of the required capacity.
Maximise airline industry support for South African tourism development	Establish a regular forum for discussion and direct communication between internationally operating airlines and destination-marketing organisations to ensure collaboration and representative participation in the air routes development forums

4.4 Ground transportation

Overview

Independent visitors to South Africa largely rely on rented cars to travel throughout the country, as there is limited public or tourism transport available. Bus and rail networks are not always connected to airports, and therefore make it difficult for travellers to get around unless they rent a car. This also makes travelling difficult for those South Africans without cars. Safe, reliable links should at least be available between major centres, transport terminals and tourism attractions and destinations.

The tourism transport industry faces a number of issues due to its operations being partly regulated by the Department of Transport in terms of vehicles and operating permits, and the Department of Tourism in terms of tour guides. This is further complicated by provincial ground transport regulation, which requires duplication of applications.

Actions to address the issue

Action	Sub-actions
Continue the process of improving ground transportation and the tourism transport licensing system to make these efficient and consistent (nationally and provincially integrated)	
Streamline the training modules for tourist guides	Ensure that the issuance of first-aid certificates and tourist guide registration are coordinated and aligned to run concurrently. Furthermore, strict and effective policing of tour operators and guides should be implemented without delay.
Contribute to an efficient, intermodal transport system in South Africa that will allow domestic and international tourists to move about easily – to, from and within destinations	Conduct a high-level assessment of current transport provision and tourism transport needs and demand, including all modes, pricing, inter-city and inner-city services
	Engage tourism ground transport providers to identify challenges in respect of ground transport
	Identify and prioritise transport needs to meet the demands of tourists. Identify key tourism routes and destinations, and ensure that there is ground transport available where relevant, as well as appropriate tourism signage to cater for self-drive tourists. Take into account the tourism marketing strategy and new tourism segments as well as the coordinated product development strategy.

4.5 Domestic airlift

Overview

South Africa’s vastness necessitates air travel between local destinations for visitors with limited time. However, apart from the Johannesburg-Cape Town, Johannesburg-Durban and the Cape Town-Durban routes (‘the golden triangle’), air travel within South Africa is expensive, and flights are not always scheduled at convenient times. Also, the cost of flights outside the three main routes is often very high as a result of demand-and-supply issues. This limits the improvement of the geographical spread of visitors to lesser visited provinces, and hampers leisure and business tourism to many destinations.

Actions to address the issue

Action	Sub-actions
Contribute to the action plan for the development and expansion of domestic airlift in South Africa. The strategy should include issues of routes, frequencies, pricing, airports, volume levels, marketing, government support, etc.	Establish a task team to investigate domestic airlift within South Africa
	Contribute to the implementation of the action plan to grow domestic air travel

5. Critical success factors for sustainable competitiveness

The following factors are critical for the successful implementation of the NTSS:

- Continuously and proactively **aligning the NTSS** (which should ideally be updated annually) **with key developments and trends** in the macro (technological, environmental, socio-cultural, political and economic), competitive and market environments. Appropriate benchmarks, indicators and evaluation mechanisms are essential.

- Strategic and visionary leadership driven by an **agreed, shared and inspirational vision**, a set of guiding values and strategic priorities, which are accepted and embraced by all public and private-sector stakeholders

- Addressing **community participation and beneficiation** as an underlying and cross-cutting strategic priority

- Giving strategic priority to **people development** (human resources and capacity building)

- Continuously **advocating tourism among all politicians and opinion leaders** as a strategic and sustainable industry, and a key contributor to GDP and job creation in South Africa (from the national to the local levels), which require appropriate funding

- Ensuring that future tourism product development and packaging are **value and market-driven** and underpinned by a **culture of service excellence**

- Ensuring and sustaining a **powerful and distinctive destination brand**, competitive positioning and innovative marketing strategy in the 'new' tourism marketplace, aligned across national, regional and local levels

- Strategically managing reliable, timely and accessible **knowledge** (such as trends, competitors, markets and strategies) and **research** as a key to future tourism planning, marketing and management of the resource base

- Ensuring a **results-driven, streamlined, dynamic and adaptable tourism structure from national to local level,** with clarity on roles, responsibilities and relationships (avoiding unnecessary bureaucracy)

- Leveraging **mutually beneficial partnerships** regionally and between stakeholders at all levels (in a spirit of co-option across political borders)

- Continuously focusing on **sustainable competitiveness** and balancing economic, social and environmental issues

- Influencing a **review of the airlift strategy**, and active participation in its implementation to improve capacity and access

- Ensuring that effective **risk mitigation plans** are in place

- Continuously **realigning the target markets with the changing market landscape** to balance the portfolios

6. Strategy risk factors

National strategies are particularly susceptible to risks, some of which can be controlled and some not. Pre-empting problems requires skill, experience and knowledge. Strategy risk is generally seen as any future incident that will negatively influence the successful implementation of the NTSS. In many texts on strategies, ‘risk’ refers to safety risks, financial risks, legal risks, natural disasters or risks associated with political developments. Each of these risks may result in failure to meet some of the NTSS targets or objectives.

Risk management, therefore, can be defined as the process of identifying these risks, assessing them, and reducing their potential impact on the overall strategy. It is as much about identifying opportunities as avoiding or mitigating losses. The process would need to be managed throughout the implementation phase. Some of these risk factors are complex and may not be within government and/or industry’s control. These would require proper analysis and understanding of the global environment that is affecting the sector, so that adjustments are made where possible. The following strategy risks factors have been identified:

- **Global currency exchange rates**

  The global currency dynamics, if not managed well, may result in a full-scale trade war among countries. This will inevitably have an impact on whether or not the NTSS targets are achieved.

- **Global economic downturn**

  Evidence has shown that, as a consequence of the recession, the industry encountered low consumer spending and a decrease in tourist numbers as travellers looked inward within their destination. This means that destinations should try to soften the blow by “exploring a framework for a visitor economy”[17] by, among others, rebalancing portfolio markets and strengthening domestic and regional tourism. There is ample evidence that other countries, such as China and the United States, have built on the strength of their domestic/regional tourism.

[17] World Economic Forum. Travel and Tourism Competitiveness Report. 2009.

- **Macro-economic policy**

  A tighter fiscal environment (government austerity measures/cuts in international marketing budgets) will threaten tourism targets. Therefore, there is a need for the country to balance its fiscal policy, its goals of attracting foreign investment, and its achievement of government priorities.

- **International or national terrorism**

  Terrorism is a major concern for tourists generally. Especially when hosting major events and attracting global media attention, tourist destinations could become targets for terrorism. Therefore, the state of safety and security has to be taken into account in the risk management process. Also important is the awareness about the cyber-terrorism and its devastating effects on the tourism value chain

- **Natural disasters and climate change**

  The potential and likelihood of international and national disasters, such as the 2010 volcanic eruptions in Iceland and the 2004 tsunami in Thailand, could pose a stumbling block for meeting the targets.

- **Breakdown in multilateral approach to global governance matters**

  A lack of cooperation and unilateral decision making on matters of global significance with specific tourism implications, such as the implementation of carbon taxes for air travel, present a particular challenge to long-haul destinations.

- **Political unrest/civic strife**

  Acts of political or social unrest have an impact on the brand of the country as a tourist destination, which ultimately affects visitor arrivals.

- **Dependence on foreign tourists**

  An overdependence on foreign tourists could prove to be fatal to the economy. International developments, such as the massive retrenchments recently experienced in the United Kingdom, the random issuance of travel advisories on South Africa due to perceptions of crime, and the imposition of strict visa regimes, do call for market and product diversification. To South Africa, such diversification could mean developing a domestic tourism growth strategy and targeting new markets within the region (African markets).

- **Crime**

The capacity, or lack thereof, to decrease crime levels may brand South Africa as an unsafe destination. The responsible portfolio departments will need to develop tourism-oriented safety plans to support the NTSS objectives.

- **Incidents of intolerance**

  Any form of intolerance/phobia towards others on the basis of origin, sexual orientation and the like will negatively affect a tourism destination. The occurrence of xenophobic incidents, if not managed well through effective mechanisms, will have an impact on South Africa's ability to attract the African market, which the NTSS highlights as one of the key markets to sustain regional tourism development.

- **Spread of diseases**

  The spread of infectious or communicable diseases poses a danger for any tourism destination. The severe acute respiratory syndrome outbreak in 2003 and the bird flu epidemic in 2004 were devastating to the Asia-Pacific region, both in terms of loss of human lives and financial losses. The impact on tourism was immediate. The emergence and spread of swine flu also had devastating effects on travel patterns.

- **Incoherent policies**

  The success of the NTSS is premised on the assumption that other sectoral policies will incorporate its pillars or imperatives. If key partners, such as sector departments, fail to accept and support the NTSS, this may have serious implications for the strategy's implementation.

- **Lack of organisational structure (national/provinces and local government)**

  The strategy calls for more integration and collaboration between spheres of government, sector departments and the private sector. This, therefore, may require a review of the structures, particularly across spheres, for the planning and budget structure to be relevant. If drastic changes are not made in this regard, it would mean business as usual, which is not in keeping with the spirit of the NTSS.

- **Poor stakeholder relations and management**

  As sound stakeholder relations are essential for the success of the NTSS in growing the tourism economy, it is important that institutional and structural arrangements are put in place and working effectively to ensure that stakeholder relations are maintained and well managed.

It is essential that we collect good background information and set up a well-coordinated, credible and consistent tourism crises management framework to ensure that, should any of the above risks materialise, South Africa is able to respond efficiently.

7. Roles and responsibilities

The tourism sector is integrated with South Africa's entire economy, all nine provinces and society, and therefore encompasses a range of different role players, whose roles and responsibilities are identified below:

NDT	The NDT's role is to ensure that tourism makes a sustained and increasing contribution to the South African economy. It also provides policy advice to the Minister of Tourism, and administers and monitors government's investment in tourism marketing and other programmes. The Department manages the core tourism data set, and distributes this and other research information to the public and private sectors. www.tourism.gov.za
SAT	SAT is an entity responsible for marketing South Africa as an international visitor destination. It owns the South African tourism-marketing brand, under which the global tourism campaign is managed. SAT strengthens its key marketing messages by providing quality information to visitors through its website. www.southafrica.net
TBCSA	A private-sector membership organisation, which has positioned itself as a united voice for the tourism industry. The TBCSA advocates the interests of its members with government and other decision makers. www.tbcsa.travel
TGCSA	The TGCSA is responsible for grading accommodation establishments in South Africa through the star quality assurance programme. www.tourismgrading.co.za
TECSA	TECSA is responsible for monitoring the industry's compliance with the tourism BEE charter and scorecard, and promoting transformation in South Africa's tourism sector. www.tourismbeecharter.co.za

TEP	The TEP is responsible for supporting the development and growth of SMMEs in the sector. www.tep.co.za
THETA	This body is responsible for ensuring that training and development standards are in place in the tourism and hospitality sectors. THETA also provides leadership within the industry on skills and training matters by identifying current and future skills needs, developing strategic plans to assist the industry to meet those needs, and promoting training that will meet the needs of employers and employees. www.theta.org.za
Provincial tourism organisations	These organisations act as a bridge between tourism operators, national tourism bodies, and local and national government. They are responsible for promoting their provinces to domestic and international visitors. At present, there are nine provincial tourism organisations funded by the respective provinces: Western Cape, www.tourismcapetown.co.za Eastern Cape, www.ectourism.co.za Northern Cape, www.northerncape.org.za KwaZulu-Natal, www.tourism-kzn.org Gauteng, www.gauteng.net North West, www.tourismnorthwest.co.za Free State, www.freestatetourism.org Limpopo, www.golimpopo.com Mpumalanga, www.mpumalanga.com
Local government	South Africa's local government is made up of five metros, 46 district councils and 232 local municipalities. Local authorities must make decisions about, and set directions for, promoting the social, cultural, environmental and economic well-being of their communities. Their role in the tourism sector is to manage assets such as public land, and to provide important infrastructure. They also represent host communities. Nationally, SALGA represents local governments. www.salga.net

Other government departments and agencies that influence tourism directly or indirectly	The growth of the tourism sector depends on a multiplicity of components, some of which fall under the mandate of other government departments and agencies. Their role is to collaborate to unblock obstacles to tourism growth, including ensuring a budget allocation for tourism. Such critical departments and agencies include the following: Department of Home Affairs, www.dha.gov.za Department of Trade and Industry, www.dti.gov.za Department of Public Enterprise, www.dpe.gov.za Department of Public Works, www.publicworks.gov.za Department of Environmental Affairs, www.environment.gov.za Department of Arts and Culture, www.dac.co.za Department of Sports and Recreation, www.srsa.gov.za Department of Education, www.education.gov.za Department of Health, www.doh.gov.za National Treasury, www.treasury.gov.za South African Police Service, www.saps.gov.za Department of Rural Development and Land Reform, www.ruraldevelopment.gov.za Department of International Relations and Cooperation, www.dirco.gov.za Department of Transport, www.dot.gov.za Department of Labour, www.labour.gov.za Department of Science and Technology, www.dst.gov.za Department of Agriculture, Forestry and Fisheries, www.daff.gov.za Stats SA, www.statssa.gov.za Airports Company South Africa (ACSA), www.acsa.co.za Border management agency
Industry associations	These represent the interests of industry in South Africa, and work to maintain the standards of different sectors within the tourism industry. Industry organisations include the following: The Association of South African Travel Agents (ASATA), www.asata.co.za The Federated Hospitality Association of Southern Africa (FEDHASA), www.fedhasa.co.za Taxi associations

	The Coach Operators Association of South Africa (COASA), www.saboa.co.za The Board of Airline Representatives of South Africa (BARSA), www.barsa.co.za The Airlines Association of Southern Africa (AASA), www.aasa.za.net The Southern Africa Tourism Services Association (SATSA), www.satsa.com The Vacation Ownership Association of Southern Africa (VOASA), www.tisa.org.za The Restaurant Association of South Africa (RASA), www.restaurant.org.za The Marketing Association Afrique (MAA), www.association.co.za The South African Association for the Conference Industry (SAACI), www.saaci.co.za The Society of Incentive and Travel Executives (SITE), www.siteglobal.com The Exhibition and Event Association of Southern Africa (EXSA), www.exsa.co.za
Labour organisations	To collaborate to ensure the provision of decent work within the sector, and to encourage the absorption of tourism graduates
International organisations	Assist with benchmarking best practices, information sharing and capacity building United Nations World Tourism Organisation (UNWTO), www.unwto.org World Travel and Tourism Council (WTTC), www.wttc.org International Labour Organisation (ILO), www.ilo.org
Funding agencies	To fund viable tourism projects in line with the NTSS objectives. These will include funding agencies such as the DBSA, the African Development Bank (ADB), Khula, etc.
Academia	The education institutions will contribute to, among others, research, curriculum and skills development, and tourism graduate placements.

8. Institutional arrangements, structure and engagement framework

Cabinet has approved a new outcomes-based approach to the MTSF. The aim is to improve service delivery by:

- increasing government's strategic focus; and
- making more efficient and effective use of limited resources through more systematic monitoring and evaluation.

All the key government institutions concerned with a particular outcome will participate in forums to develop delivery agreements, thereby ensuring delivery for that specific outcome. The NDT is the lead department for the development of a sector strategy to support employment growth for tourism under outcome 4, "Decent employment through inclusive growth matrix". MINMEC will however remain the main implementation forum. The following supporting departments have been identified as key for the development and implementation of the NTSS:

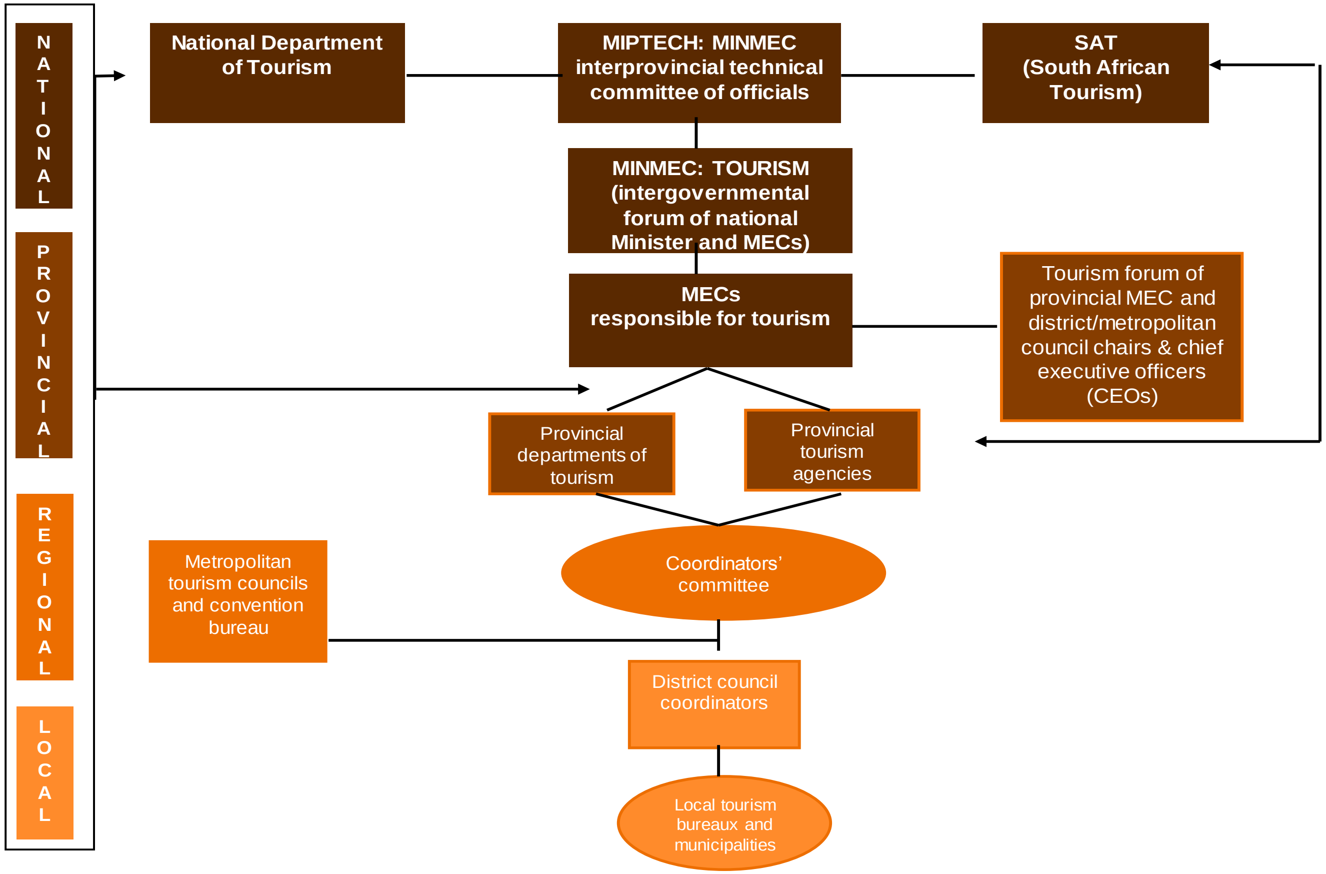
- dti
- Transport
- National Treasury
- Economic Development
- Rural Development and Land Reform
- Public Enterprise
- Labour
- Home Affairs
- Other relevant departments will also be consulted

8.1 Institutional structure for tourism in South Africa

The institutional tourism structures at the following levels are set out below:

- National level
- Provincial level
- Regional level
- Metro level
- Local government level

Proposed institutional structure for tourism in South Africa



Arrangements at national level

The key structures at the national level are:

MINMEC	The intergovernmental tourism forum of the National Minister of Tourism and the provincial MECs for Tourism that discusses and agrees on national tourism policy matters
MIPTECH	The interprovincial technical committee on tourism is an intergovernmental forum of national and provincial tourism officials, SALGA, heads of government of provincial tourism departments, and CEOs of tourism authorities, that coordinate provincial and national tourism affairs in preparation for and support of the MINMEC.
NDT	The Department is responsible for national tourism policy, regulation and development.
SAT	SAT is responsible for international and domestic marketing of South Africa as a tourism destination, quality assurance and provide strategic leadership on convention bureaus

Arrangements at provincial level

Effective tourism-coordinating mechanisms should be established at the provincial and local government spheres in order to ensure synergised efforts and optimal resource allocation and usage. The various tourism spheres should complement one another, culminating in a strong and effective provincial tourism development effort.

The following are the key entities at provincial level:

MEC tourism forum	It is vital that tourism be acknowledged and managed as a priority at provincial level. To this end, it is proposed that the provincial MECs for Tourism should establish an MEC tourism forum, where they can meet with the chairpersons of the district and metropolitan councils and voluntary regional tourism associations on a biannual basis to discuss the tourism strategy for the province. The MEC tourism forum should be informed by the provincial coordinators' committee comprising officials of the provincial tourism authorities and the district/metropolitan tourism coordinators. It should meet regularly to discuss and agree on cooperative tourism programmes and strategies.
Provincial tourism authorities	Provincial tourism authorities should align their international tourism marketing efforts with those of SAT to ensure synergy.

Responsibility schedule

The provincial tourism departments and the statutory provincial tourism authorities should be responsible for formulating and executing the tourism policy and strategy within the following responsibility schedule:

Distinct responsibilities of the provincial tourism departments and provincial tourism authorities	
Provincial tourism departments	**Provincial tourism authorities**
• Formulate, publish, legislate and monitor provincial tourism policy and strategy • Provide funding for tourism promotion and development, and monitor the application of the funds • Work with national safety and security departments and bodies to address tourism safety and security • Maintain and develop provincial public tourist attractions (e.g. historical, cultural and environmental) • Facilitate the provision of public infrastructure	• Guide and lead the implementation of the provincial tourism marketing policy and strategy • Cooperate with SAT in generically marketing the province globally as a key part of the South African tourism product • Generically market the province domestically • Work with regional coordinators and LTBs to package new themes, routes and experiences • Develop a provincial marketing toolkit that represents all products, areas and towns

Distinct responsibilities of the provincial tourism departments and provincial tourism authorities	
Provincial tourism departments	**Provincial tourism authorities**
• Facilitate the provision of public amenities, such as parking, ablution and public transport, in support of the tourism industry • Conduct spatial planning in support of tourism, and allocate land and infrastructure for tourism development • Establish a road sign plan and provide road signs • Work with relevant departments to maintain the general safety, upkeep, cleanliness and beautification of the province	• Establish an integrated provincial tourism information system (including an accredited information offices network) together with regional coordinators, LTBs and the private sector • Initiate provincial initiatives to raise awareness and understanding of tourism among the population at large • Manage and implement provincial tourism registration and accreditation systems in conjunction with LTBs
Joint responsibilities of provincial tourism departments and provincial tourism authorities	
• Formulate a provincial tourism development framework, and work with regional coordinators, LTBs, private sector and all other relevant bodies to develop new tourism products and attractions • Initiate basic training and education programmes to improve tourism knowledge and skills, within the framework set by the Sector Education and Training Authority (SETA) at national level • Establish a tourism business advisory network to encourage and stimulate entrepreneurship • Initiate provincial programmes to facilitate increased participation by previously disadvantaged communities and entrepreneurs in tourism	

Arrangements at regional level

The regional tourism function should be mainly a developmental one, and should focus on the following two structures:

Voluntary regional tourism associations	The tourism industry and LTB in an area may decide to form a voluntary regional tourism association, but such body should operate independently of government statutes or finance. There should be no obligation to establish such an association.

Tourism coordinating committee	Provincial tourism structure that provides for alignment and integration between provinces and local government within the province

Arrangements at metro level

As the gateways to the provinces, the tourism bodies for the metro councils require special attention, and the following is proposed:

Tourism and conventions bureau	A single tourism and conventions bureau should be established for each metropolitan area. In addition to the functions of a tourism coordinator (similar functions to LTB), such bureau should have a strong events and conventions management focus, and should arrange and bid for major tourism meetings, events and conventions. Existing LTBs in metropolitan areas should be amalgamated into, and fulfil the role of, information offices of the bureaux, depending on their location.

Responsibility schedule

Tourism body	Government

Regional tourism organisations (RTOs)	District/metropolitan council coordinating function
RTOs should be voluntary bodies that could be established by the private sector and/or local tourism bureau in an area. • Aimed at collectively packaging and marketing the products of a regional area in conjunction with LTBs and district council coordinators, in support of the provincial marketing strategy and information system	• Primarily a developmental and coordinating role • Conduct similar functions to those of the local municipality, for areas without municipal status in the jurisdiction of the district council (see local authority functions above) • Assist with the establishment and maintenance of LTBs (at least information offices) in towns and settlements that are unable to establish these • Act as a coordinator of common actions among the various LTBs within the jurisdiction of the region • Assist the provincial tourism authority and RTO (should it exist) to package the products of the region collectively, in support of the provincial marketing strategy and information system

Arrangements at local level

The following proposals are made in relation to arrangements at the local level:

LTB	Tourism-specific functions should be carried out by an LTB, which should: • be established by the local authority (town or district council) and private businesses in a local area, as a legal entity that represents these parties; • be jointly funded by the local authority and private-sector/industry members in the area, as well as from own revenue, including marketing commissions; • include a significant number of persons who represent previously disadvantaged constituencies; and • be accredited to the provincial tourism authority if it meets the requirements.
Local authorities	The local authority's line function departments should be responsible for all integrated development matters, including the development of tourist attractions, the provision of public amenities and infrastructure in support of tourism, and the general maintenance of the environment. These should be part of the development plan of the local authority, who should consult the LTB in the planning and implementing phases.

Responsibility schedule

Local tourism authorities should perform the following functions:

Tourism body	Government
LTB • Manage the information office(s) of the local area, and feed into the provincial information system • Market specific events, conferences and meetings that occur in the local area • Act as a first point of registration for tourism businesses in respect of the provincial registration system, and monitor minimum standards maintained by registered businesses in local authority area • Receive and channel applications for local road signs from members to the municipality • Promote tourism awareness, a culture of hospitality, and involvement in tourism among the local population • Keep a general watch over tourism matters, and advise the municipal authority regarding tourism development requirements	**Local authority** • Establish, and provide financial support to, the LTB • Upkeep and development of public tourist attractions (e.g. historical, cultural and environmental) • Provide public infrastructure • Provide public amenities, such as parking, ablution facilities and public transportation, in support of the tourism industry • Conduct spatial planning in support of tourism, and allocate land and infrastructure for tourism development • Plan and provide local road signs • Maintain the general safety, upkeep, cleanliness and beautification of the local area • Assist the LTB in implementing the provincial registration and minimum standards system by providing health and safety inspection services

8.2 Intergovernmental and stakeholder engagement framework

The NDT, working with all stakeholders, shall develop an intergovernmental and stakeholder engagement framework, which will provide for the establishment of a delivery forum consisting of various stakeholders with specified roles and responsibilities.

8.3 National Department of Tourism structure

The NDT's current structure was developed in the process of setting up the new Department, after the Tourism and Environment portfolios had been separated. The final structure of the Department will be determined by the best configuration to deliver on the priorities as contained in the NTSS.

This process will be premised on the saying 'structure follows strategy' ('form follows function'), and, therefore, ideally, this NTSS should inform the development of the departmental structure. The institutional structure proposed in this strategy document does not cover the administrative support functions that are required for the proper functioning of the Department, such as human resource, information technology, corporate communications, etc.

During the implementation of action plans, the activities of key branches in the NDT and the different programmes must be carefully coordinated to avoid overlaps and duplications, and maximise collaboration. For example, awards/recognition form part of more than one action plan, and these should be coordinated by one point, such as corporate communications.

9. Monitoring, evaluation and reporting mechanisms

The successful implementation of the NTSS will only be possible through proper monitoring and evaluation, for which the NDT is responsible. The Department has established a Monitoring and Evaluation Unit, whose role, among others, will be to monitor the implementation of the strategy in collaboration with all stakeholders.

Through the delivery forum, this unit will collate progress reports on the achievement of targets identified in the strategy and other documents. The NDT will publish an annual report, reporting back on progress against the main targets, on each strategic thrust and other related programmes. The delivery forum is provided for in the draft intergovernmental and stakeholder engagement framework.

ANNEXURE A – List of Panel Members

Representing Area	Panel Member	Designation[18]
Chairperson	Robert Gumede	Independent Business Person
Presidency	Gregory Goeller	Economic Adviser to the Deputy President
People with disabilities:	Amor Malan	Member of the South African Tourism Board
Airlines:	Chris Zweigenthal	Chief Executive Officer: Airlines Association of Southern Africa
	Allan Moore	Chief Executive Officer: Board of Airline Representatives South Africa
Airports Company of South Africa	Monhla Hlahla	Chief Executive Officer
Accommodation, Food and Beverage	Graham Wood	Deputy Chairperson: Tourism Business Council of South Africa and Managing Director: Southern Sun
South African Local Government Association	Xolile George	Chief Executive Officer
Travel and Services Industry	Tommy Edmond	Chairperson: Tourism Business Council of South Africa and Chief Executive Officer: Tourvest
Research Community	Iraj Abedian	Chief Executive Officer: Pan African Advisory Services
	Anitha Soni	Chairperson of International Marketing Council of South Africa Board and Chief Executive Officer: ASA Tourism Services Group
Tourism, Hospitality & Sports Education & Training Authority	Mike Tsotetsi	Chief Executive Officer
Tourism Business Council of South Africa	Mmatšatši Marobe	Chief Executive Officer

[18] For the period of the Panel if Experts

Small Business development	Siva Pillay	Chief Executive Officer: Tourism Enterprise Partnership
Academia	Daneel van Lill	Director of the School of Tourism and Hospitality: University of Johannesburg
National Economic and Development Council	Herbert Mkhize	Executive Director
Development Bank of Southern Africa	Kate Rivett-Carnac	Tourism Specialist
Industry Development Corporation	Mbuyazwe Magagula	Head: Tourism
Federation of Unions of South Africa	Dennis George	General Secretary
Congress of South African Trade Unions	Bheki Ntshalintshali	Deputy General Secretary
Provinces (as nominated by MINMEC Tourism)	Ndabo Khoza	Chief Executive Officer: Tourism KwaZulu Natal
	Charles Ndabeni	Chief Executive Officer: Mpumalanga Tourism and Parks Agency
Marketing	Didi Moyle	Acting Chief Executive Officer and Chief Operating Officer: South African Tourism
Quality Assurance	Thembi Kunene	Chief Executive Officer: Tourism Grading Council of South Africa
Ministry of Tourism	Shaun Vorster	Advisor to the Minister of Tourism
	Nontuthuzelo Nqabeni	Head of office of the Deputy Minister of Tourism
Department of Tourism	Nosipho Ngcaba	Former Director-General: Department of Environmental Affairs and Tourism and Director-General: Environmental Affairs
	Dirk van Schalkwyk	Chief Operating Officer: Department of Environmental Affairs and Tourism and Acting Director-General: Tourism
	Sindiswa Nhlumayo	Deputy Director-General: Tourism
	Linda Garlipp	Chief Director: Legal Services

Secretariat	Anemé Malan	Chief Director: Tourism Industry Development and Acting Deputy Director-General: Policy, Research, Monitoring and Evaluation
	Bulelwa Seti	Chief Director: Tourism Industry Promotion and Acting Deputy Director-General: Tourism Growth