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REPUBLIC OF SOUTH AFRICA

# **NATIONAL TOURISM SECTOR STRATEGY (NTSS)**

**16 SEPTEMBER 2011**

# Introduction

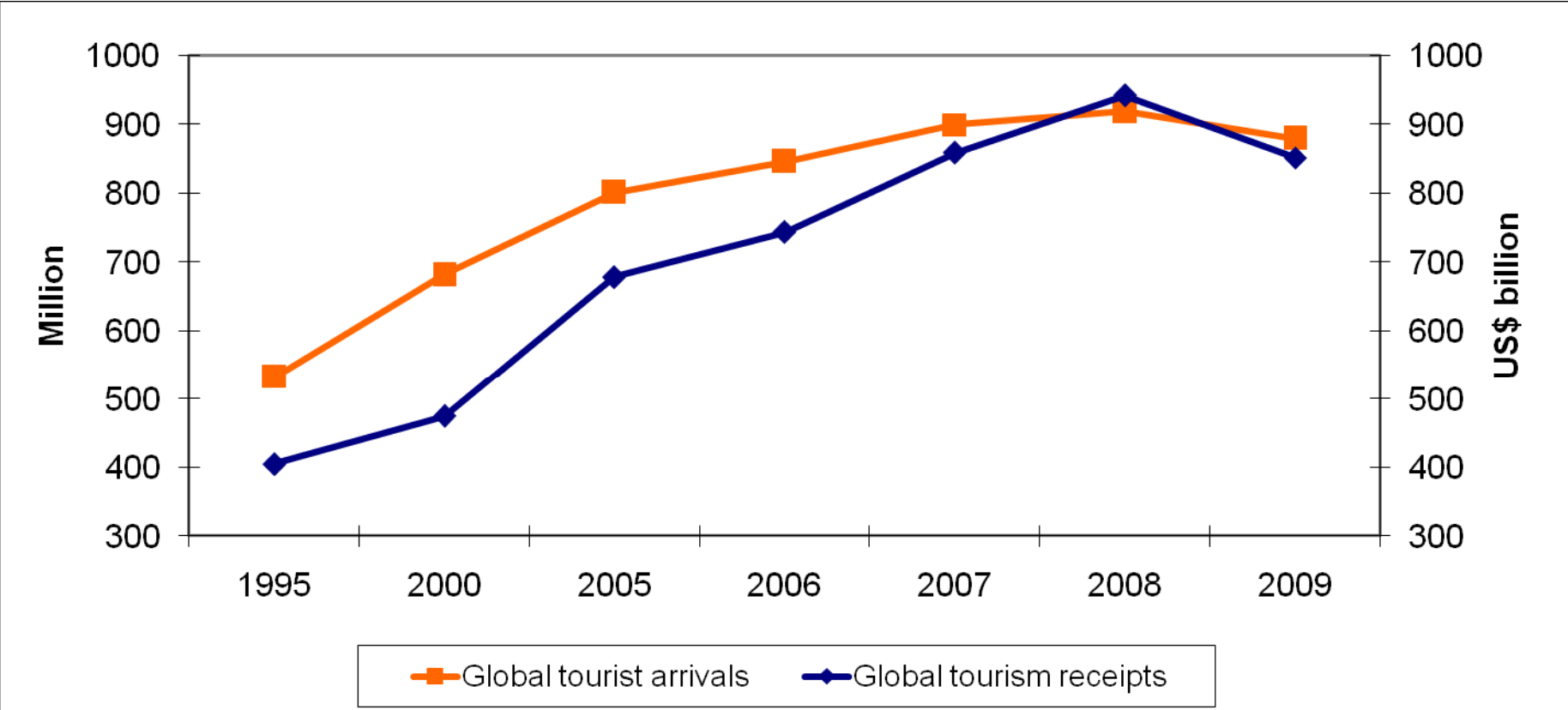


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# GLOBAL PICTURE



There were over 63 million foreign arrivals to South Africa over the period 2002 and 2009

### Foreign Arrivals in South Africa, 2002-2009



	02-03	03-04	04-05	05-06	06-07	07-08	08-09
Year-on-Year Change	1.2%	2.7%	10.3%	13.9%	8.3%	5.5%	3.6%

# Opportunity...

To strengthen position of South Africa as:

- leading tourist destination in the world
- growing tourism GDP level to R125bn (3.5%) by 2015
- creating 800 000 jobs by 2015
- growth in domestic tourism
- spreading benefits to the entire population



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# To achieve this . . .

- prioritisation of tourism at national government level
- improved intergovernmental coordination
- harness full potential of expertise available
- strengthened collaboration and partnership with industry
- conducive political, policy and regulatory environment
- coordination of efforts & initiatives and to understand needs of global tourists



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# Current reality...

- no overall tourism strategy for the country
- fragmented efforts/ uncoordinated
- duplication of efforts and expenditure
- less impact for every promotional /developmental rand spent



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# Therefore need ...

- a clearly defined tourism strategy
- one central point to co-ordinate initiatives
- complete ownership of responsibilities by all stakeholders



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# The National Tourism Sector Strategy (NTSS)

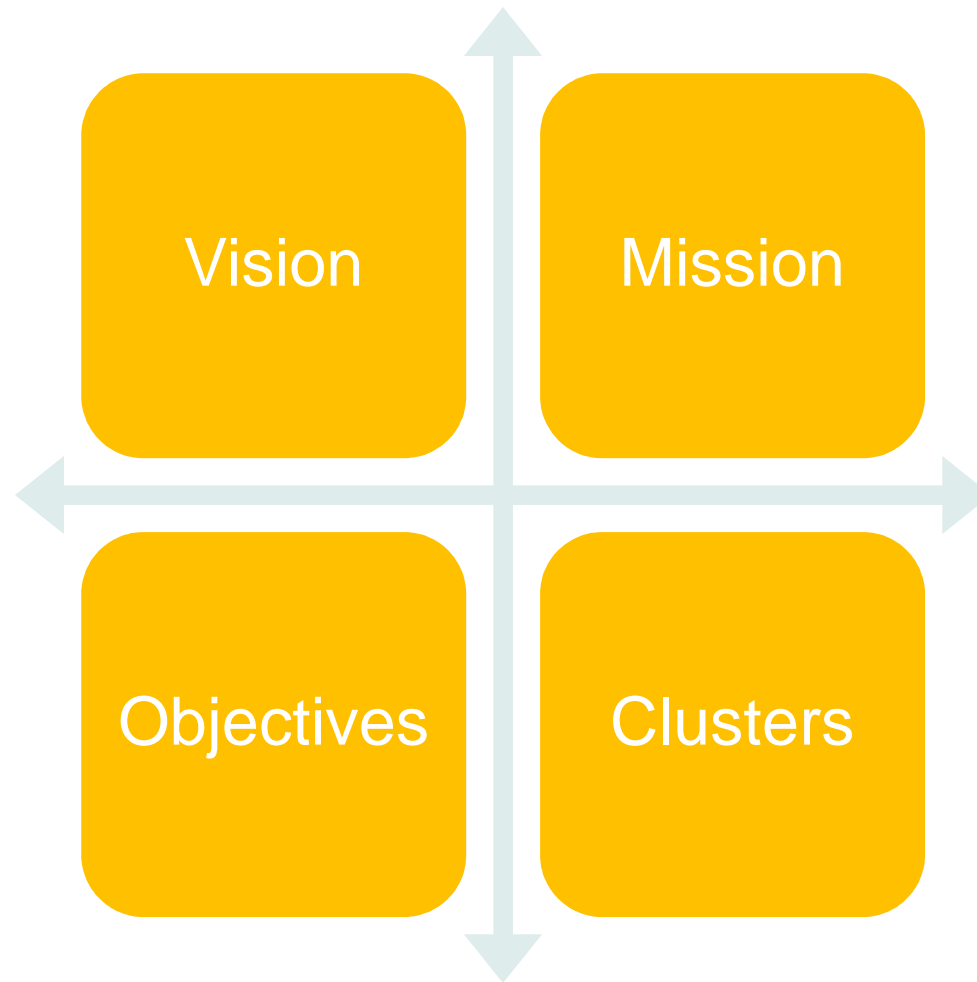


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# Strategy overview



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# Vision . .

**Boldly growing  
responsible tourism  
together  
to deliver memorable  
experiences for all our  
tourists and sustainable  
benefits for all South  
Africans**



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# Mission . .

We will achieve our vision through:

- effective, cooperative partnerships;
- dramatically improving service levels;
- a diverse range of quality, innovative, unique, and authentic products which meet market needs;
- providing value for money;
- inspiring more South Africans to enjoy the tourism experiences of our country;
- ever increasing numbers of foreign tourists experiencing our country;
- leading the world in environmentally sustainable tourism;
- addressing all aspects of people development;
- providing decent work;
- increasing public and private sector investment in our industry



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# Objectives . . .

- to grow the tourism sector's absolute contribution to the GDP
- to achieve transformation within the tourism sector
- to provide excellent people development and decent work within the tourism sector
- to entrench a culture of travel amongst South Africans
- to deliver world-class visitor experience
- to address the issue of geographic, seasonal and rural spread

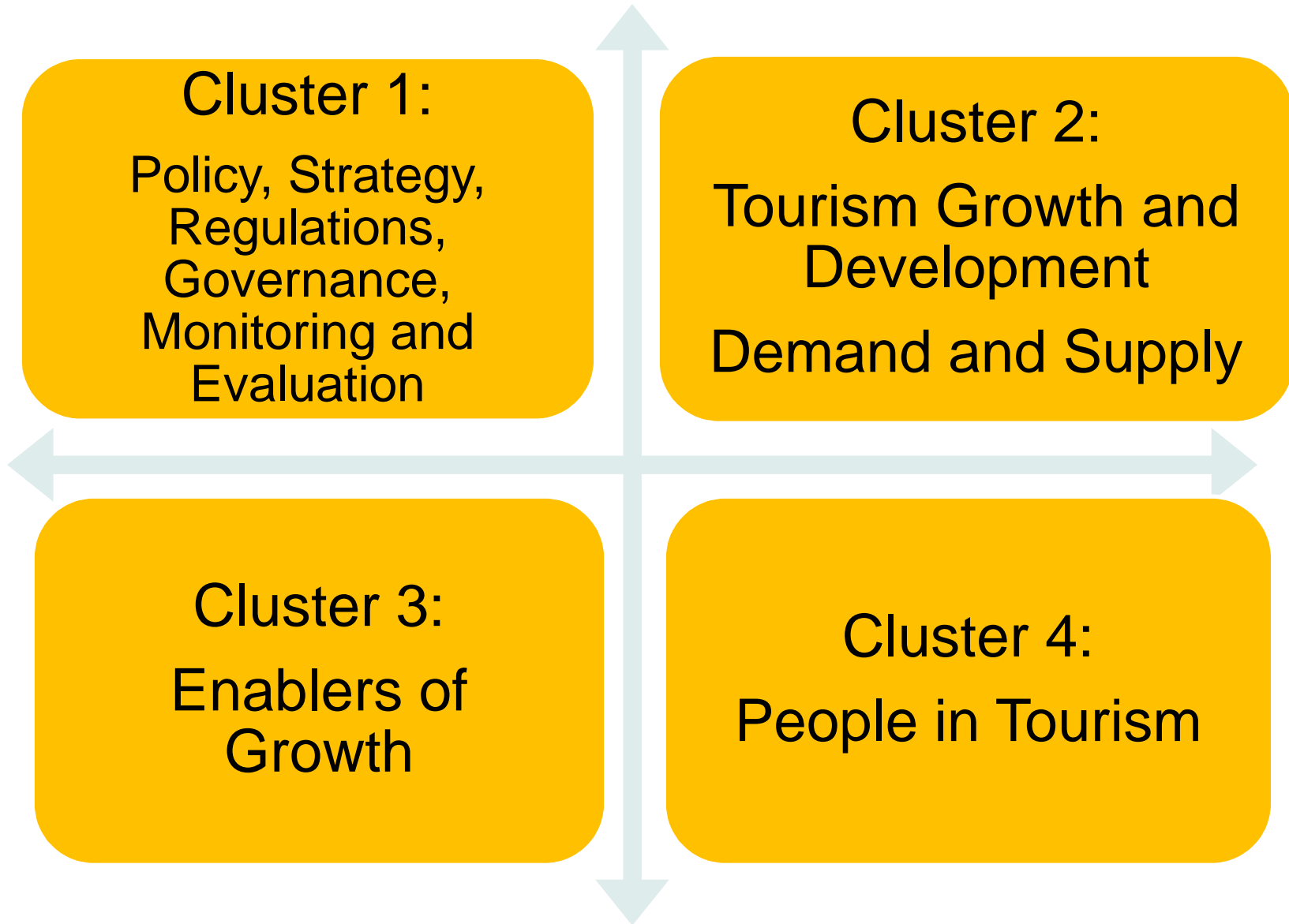


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# 4 clusters . . .



# Cluster 1 . . .Policy, Strategy, Regulations, Governance, Monitoring and Evaluation

Issue	Problem Statement	Solution/Response / Action
<b>Prioritizing tourism at national government level</b>	Spheres of Government not planning and allocating sufficient budgets for Tourism	Engage with Cabinet, Ministries and departments to raise the profile of the industry
<b>Research, Information and Knowledge Management</b>	No National Research Strategy, duplication of efforts due to lack of coordination, and unavailability of market intelligence	Set up a dedicated Research and Knowledge Management Unit to guide research
<b>Strengthen Collaboration and Partnerships within the Industry</b>	Lack of intergovernmental , interdepartmental and sub sector collaboration and communication	Formalise structures for collaboration and interaction between public and private sector at all levels

## Cluster 2: tourism growth and development - supply

Issue	Problem Statement	Solution/Response/ Action
<b>Domestic Tourism Development</b>	The culture of travelling is not entrenched in the majority of South Africans	Develop government subsidized worker holiday schemes to encourage low income earners to travel for leisure
<b>Capacity Building and Budget Allocation at Local Govt Level in Tourism Planning and Management</b>	Few tourism personnel, lack of planning capacity and insufficient budget allocations at Local Government level	Engage with SALGA, National Treasury and COGTA to ensure tourism activity is developed and allocate budgets for tourism at Local Government level
<b>Tourism Information Provision</b>	Lack of National Framework resulting in provision of information to tourists being uncoordinated and inconsistent	Develop and maintain a national tourism information provision framework



## Cluster 2: tourism growth and development – supply cont

Issue	Problem Statement	Solution/Response/Action
<p><b>Co-ordinate Product Development</b></p>	<p>Tourism product development is currently driven mainly by the private sector due to a lack of coordination by government</p>	<p>Develop and implement a national strategy to upgrade tourism attractions and heritage resources including other entities and government departments</p>
<p><b>Quality Assurance and Universal Accessibility</b></p>	<p>Current grading scheme does not ensure that products and services are accessible to all, e.g. people living with disabilities and the elderly</p>	<p>Review the current grading scheme and implement KPMG findings</p> <p>Introduce incentives to ensure that businesses and attractions are universally accessible</p>

## Cluster 2: tourism growth and development – supply cont

<b>Issue</b>	<b>Problem Statement</b>	<b>Solution/Response/Action</b>
<b>Investment Facilitation, including Enterprise Development and Development Finance</b>	There are a lot of barriers for South Africans wanting to start tourism businesses, e.g. funding	Establish a tourism development fund to assist in the development of the tourism industry  Engage with financing institutions to improve access to finance for tourism businesses
<b>Environmental Management and Triple Bottom Line issues</b>	Tourism industry is threatened due to the propensity of people avoiding travel to reduce their emission	Promote SA's environmentally responsible tourism practices internationally

## Cluster 2: tourism growth and development – demand

Issue	Problem Statement	Solution/Response/Action
<b>Marketing, Branding and New Market Development</b>	Lack of the development of new markets and non inclusion of niche tourism in marketing efforts due to limited budget	Develop a marketing strategy targeted at the African market and niche tourism that focuses on new markets
<b>Business Tourism / Events</b>	Lack of national coordination leads to competition between Provinces and cities thus limiting SA's ability to attract international events	Establish a National Convention and Events Bureau (NCB) that will develop an events strategy
<b>African Tourism Development Strategy</b>	Source markets within Africa are not clearly understood despite Africa being the source of foreign arrivals in South Africa	Identify and develop other key African markets  Facilitate movement of African tourists who come to the country for shopping purposes

## Cluster 3: Enablers of growth

Issue	Problem Statement	Solution/Response/Action
<b>Improving General Awareness of Tourism among South Africans</b>	Tourism is seen as an activity for rich foreigners due to limited exposure and understanding of its benefits by South Africans	Drive a PR campaign and develop programmes aimed at targeting all sectors of the South African population with the message that travel and tourism is a lifestyle activity for all
<b>Perceptions of Safety and Security</b>	South Africa is perceived as an unsafe destination for tourists	Develop and implement a major campaign to improve perceptions of safety and security in foreign source markets
<b>Airlift International</b> –	Flights to South Africa from other markets are lacking and expensive due to the cost of airport taxes and other charges	Mobilise & maximise airline industry support for the development of the tourism industry  Redefine the role of SAA as to whether it is a national or Commercial carrier

## Cluster 3: Enablers of growth cont . . .

Issue	Problem Statement	Solution/Response/Action
<b>Airlift Domestic</b>	– Air travel within South Africa is lacking and expensive which makes it inconvenient for tourists to reach other destinations	Establish a task team to investigate domestic airlift within South Africa  Set up a communication forum with airlines and destinations experts
<b>Ground Transportation</b>	Ground and rail networks are not always connected to airports (inter-modal transport)	Develop a vision and strategy for an efficient, inter-modal transport system in South Africa which will allow domestic and international tourists to move about easily

## Cluster 4: People in tourism

Issue	Problem Statement	Solution/Response/Action
<b>Transformation</b>	Transformation in the tourism industry is very slow, with few black entrants in the market, and big and small business still largely dominated by white people	<p>Develop strategies to encourage businesses to comply with the BEE Charter</p> <p>Develop programmes to attract more black entrepreneurs to enter the industry as owners</p>
<b>People Development</b>	<p>Industry does not attract or retain quality people due to low salary levels</p> <p>Poor training and development due to ineffectiveness of THETA</p>	<p>Review, manage and implement the Human Resource Development Strategy</p> <p>Improve THETA's effectiveness</p>
<b>Provide Decent Work in the Tourism Industry</b>	Tourism industry is not considered a good employer due to low wages and long working hours	<p>Develop a strategy to attract and retain labour</p> <p>Encourage businesses in the tourism industry to comply with the principle of providing decent work</p>

## Cluster 4: People in tourism cont . . .

Issue	Problem Statement	Solution/Response/Action
<p><b>Service Excellence</b></p>	<p>Service levels in tourism and South Africa are extremely inconsistent and poor</p>	<p>Create public awareness amongst consumers of world class service standards and educating industry employees of the importance of customer care</p>
<p><b>Improve Community Benefits and Participation in Tourism</b></p>	<p>The level of tourism awareness within various communities is limited, especially rural ones due to unrealistic expectations about its benefits</p>	<p>Improve local government capacity and understanding of tourism</p> <p>Build awareness and understanding about tourism among communities in particular rural communities to eliminate unrealistic expectations</p> <p>Identify destinations and areas where communities can become beneficiaries of tourism projects and identify and support appropriate product development</p>

# Intergovernmental and Stakeholder relations

With current structure of governance, we will not grow tourism due to ...

- concurrent functions as per the constitution
- lack of coordination and integration
- National/Provinces/Cities promoting independently
- lack of partnership and collective approach in planning for tourism



# Roles and responsibilities . . .

- National Department of Tourism leading and monitoring implementation
- Provincial Departments responsible for policy formulation and implementing tourism development strategies
- Local Government to maintain infrastructure, provide funds and integrate tourism within economic development activities
- Sector departments to provide support
  - Dti, National Treasury, Economic Development, etc
- Key departments to participate in various forums
- Development of delivery agreements with sector departments and partner institutions

# Where are we now . . .

- Draft NTSS approved for public comment by Cabinet
- Launched by Minister on 21 May 2010
- Gazetted for public comments on 28 May 2010 for 60 days (ending 31 July 2010)
- Stakeholder outreach and consultation for inputs, e.g. bilaterals
- Process of integrating inputs to commence after 31 July 2010
- Initiate cabinet approval processes

# Conclusion

## To strengthen South Africa as :

- a leading tourist destination in the world
- spreading benefits to entire population



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A clearly define strategy . . .

## **The National Tourism Sector Strategy (NTSS)**

- National, Provincial, Local Government coordination
- Private sector partnership
- Community gets direct benefits from tourism revenue



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# Thank You



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