Mpumalanga Tourism Development Strategy 2018

economic development
& tourism

MPUMALANGA PROVINCE
REPUBLIC OF SOUTH AFRICA

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Core Definitions

Tourist	Any visitor travelling to a place other than that of his/her usual environment for more than one night but less than 12 months, and whose main purpose of the trip is other than the exercise of an activity remunerated from within the place visited.
Same day visitor	A visitor who visits a place for less than one night.
Tourist	A visitor who stays at least one night in the place visited.
International tourist	An international visitor who stays at least one night in collective or private accommodation in the country visited.
Domestic tourist	A resident visitor who visits within the economic territory of the country of reference.
Trip	A journey undertaken by one or more members of the household for at least one night away from home, where a person did not receive any remuneration (did not make any profit) at that destination. It is important to note that a trip must be complete. That means a trip is only applicable when a person returns to his/her place of residence.
Tourism expenditure	Tourism expenditure refers to the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips.
Destination	Denoting a place that people will make a special trip to visit.

Abbreviations / Acronyms

B-BBEE	Broad-Based Black Economic Empowerment		**GDP**	Gross Domestic Product
MEGDP	Mpumalanga Economic Growth Development Plan		**NDP**	National Development Plan
BEE	Black Economic Empowerment		**NDT**	National Department of Tourism
DEDT	Department of Economic Development and Tourism		**NEF**	National Empowerment Fund
IDC	Industrial Development Corporation		**NTSS**	National Tourism Sector Strategy
DM	District Municipality		**NYDA**	National Youth Development Agency
MTPA	Mpumalanga Tourism and Parks Agency		**PSC**	Project Steering Committee
DCSR	Department of Culture, Sport and Recreation		**RTO**	Regional Tourism Organisation
DOT	Department of Transport		**SA**	South Africa
GVA	Gross Value Added		**SAT**	South African Tourism
KZN	KwaZulu-Natal		**SDF**	Spatial Development Framework
MP	Mpumalanga		**SDI**	Spatial Development Initiatives
LED	Local Economic Development		**SEDA**	Small Enterprise Development Agency
KMI	Kruger Mpumalanga International Airport		**SEFA**	Small Enterprise Finance Agency
LM	Local Municipality		**SMME**	Small, Medium & Micro Enterprises
LTO	Local Tourism Organisation		**TFCA**	Trans Frontier Conservation Area

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Section 1: Introduction

1.1. Background

Mpumalanga offers tourists a rich diversity of natural and cultural landscapes, attractions and activities that position the province as a strong competitor within the tourism sphere. However, opportunities exist to expand even more and should be embraced by industry role players to improve the overall performance of the sector. To develop these opportunities and implement growth initiatives, an inclusive approach, effective management and stakeholder collaborations are needed. In developing this tourism strategy, the goal is to stimulate economic growth, get the local communities to participate in tourism and ensure that benefits are spread to all who are involved. In doing so, it is possible to build and foster a sense pride and excitement in all parties who form part of the province's tourism sector.

Tourism growth in Mpumalanga can be achieved through enhancing the innovative development and effective management within the sector. The following elements constitute key vision and mission focus areas:

- Formulating appropriate institutional frameworks
- Implementing destination and product marketing campaigns
- Investment promotions to create an enabling environment for the development of the sector
- Human resource development programmes
- Instrumental in protecting Mpumalanga's natural resources
- Encourages the upgrade and diversification and expansion of tourism products
- Achieve a more balanced spatial spread of tourism development and associated benefits

Strategy objectives are outlined as follows:

- Develop the tourism sector as a driver of economic activity
- Product expansion and diversification
- Initiate and implement sustainable and responsible tourism practices
- Develop a competitive tourism product

1.2. Methodology

In formulating the tourism strategy, apart from continuous Project Steering Committee (PSC) meetings, a scoping exercise and individual interviews conducted in person or telephonically, three workshops were steered during which consultations were held with stakeholders directly associated with the tourism sector. Stakeholder engagements involved representatives from the public as well as the private sector. Engagements were directed at assessing the current state of tourism in the province and reviewing policies that inform tourism development and management. To guide the tourism strategy, attention was focused on identifying the strengths and weaknesses of the tourism sector, also addressing the challenges and opportunities pertaining to marketing,

product development, infrastructure, accessibility, destination management, transformation and institutional arrangements. Recommendations and input received from stakeholders form the foundation of the tourism strategy as adopted in this report.

1.3. Report structure and themes

Section one looks at the background of the strategy in general. It gives background information on the province's tourism potential and provides the methodology used to develop the tourism strategy. Section two gives a contextual overview relating to the spatial and economic information of the province. It addresses important geographic areas, roads, as well as employment, education, contributions to Gross Domestic Product (GDP) and tourism's value for the province. Section three analyses the state of tourism in the province by looking at the tourist demand information for Mpumalanga. This focuses on tourist arrivals and tourist spending patterns of both the international and domestic market share. It also comprises of the tourism supply information for Mpumalanga. This covers accommodation, hospitality and related services, travel agencies and related services as well as attractions and activities. This provides a platform from which the challenges and opportunities can be identified and applied to guide the development of the strategy. Section four provides a strategic overview of the national, provincial and regional policies that guide and inform tourism activities and the management thereof. It also outlines objectives and specific outcomes that should be aimed at to achieve.

Section five provides a brief overview of the previous Mpumalanga Tourism Growth Strategy. This section looks at the geographical areas as well as the flagship projects that have been identified for possible development as well as the projects that have been partially developed or not at all. Gaps in this strategy have been outlined as to be addressed in the new strategy. In section six, the strategic framework is addressed, where the objectives of the tourism strategy, its key drivers and barriers are outlined. It also aligns the objectives, outcomes and actions of the tourism strategy with the main pillars of the National Tourism Sector Strategy (NTSS). The table also suggests possible projects and activities to work towards achieving the strategy goals. Section seven evaluates the institutional arrangement of intergovernmental relationships. This framework indicates the communication channels that exist between the public and private sectors as well as the platform on which these interactions should take place. A recommended framework is provided that would effectively serve the province's tourism sector. The final section, section eight, explains the different implementation items used to compile the implementation plan, this includes the priority level assigned to each action as well as the timeframe in which the individual actions should occur. The section is concluded with the implementation tables as aligned to the NTSS pillars.

Section 2: Contextual Overview

2.1. General Background of Mpumalanga Province

Mpumalanga is one of the main tourism destinations in South Africa (SA) as it holds natural wonders as well as cultural and heritage sites that provide an exceptional experience to tourists. The main tourism activities in Mpumalanga are hosted by the district of Ehlanzeni. Here, tourists will find the famous Kruger National Park, and it is also the home of the Blyde River Canyon, Longmere Dam and many more. Tourism in Mpumalanga is one of the biggest contributors towards the Gross Value-Added (GVA) in Mpumalanga, which will be discussed in the strategy.

The Mpumalanga Economic Growth and Development Plan (MEGDP) identified Mpumalanga's tourism sector as one of the main drivers of economic activities in the province; however, tourism in general has declined due to a decreasing market share. Factors that hinder tourism growth include ongoing protest in the surrounding areas, insufficient marketing in the sector, fragmented strategies and programmes and especially the lack of skills and poor-quality service These issues aside, Mpumalanga has the potential to be a premier and competitive domestic as well as international tourism destination.

2.2. Spatial Background

Mpumalanga spatial contribution is a factor that cannot be overlooked. Mpumalanga consists of many road linkages that connect regions, making it possible to import and export goods. Mpumalanga consists of many tourism attractions that play a significant role in the spatial economy of the province. The tourism activities that take place in Mpumalanga provide the job opportunities in surrounding areas which ultimately contribute towards economic growth. The economic activities that take place in the province provide economic opportunities for neighbouring regions, for example forward and backward linkages in the Ehlanzeni district.

Mpumalanga holds many spatial attributes which include an excellent movement network, responsible for connecting people, services and goods. This is especially true for tourism, which requires defined linkages between regions and opportunities for the import and export of goods. A great array of tourism attractions is evident in Mpumalanga, which plays a significant role in the spatial economy of the province in the form of job opportunities in the surrounding areas. Tourism and other economic activities that take place in the province have a spill-over effect for neighbouring regions such as the existing forward and backward linkages in the Ehlanzeni district.

Regional linkages:

- The N4, which is Mpumalanga's main road, links Gauteng (Tshwane) to the Maputo Harbour (Mozambique). The N4 is also supported by the N12 which links to Emalahleni to Johannesburg.
- The N17 links Johannesburg with Swaziland through Ermelo in Gert Sibande DM.
- The N3 traverses Mpumalanga (Dipaleseng LM) to link Johannesburg and Durban.
- The N2 links Ermelo with Mkhondo and KwaZulu-Natal.

- The N11 links the Botswana Groblersbrug border post with Mookgopong (Limpopo), Middelburg (Nkangala LM), Ermelo (Gert Sibande DM) and Volksrust (Gert Sibande DM) in Mpumalanga to Newcastle and Ladysmith in KwaZulu-Natal.

Table 1: Growth points that were identified

	Dominant Function	Significance	Growth/Concentration Point	GVA Contributions at Each Growth Point
Mbombela	Economic	Regional	Growth Point	16.57%
Secunda	Economic	Regional	Growth Point	14.04%
eMalahleni	Economic	Regional	Growth Point	22.59%
Middelburg	Economic	Sub-Regional	Growth Point	11.49%
Ermelo	Economic	Sub-Regional	Concentration Point	4.42%

The spatial economic points in the region were identified. They show where the main economic activities take place in each region and how it impacts on the economy. According to the previous provincial Spatial Development Framework (SDF), the growth points are defined as:

Growth Point	**These are the key economic drivers of the province from a spatial perspective. These municipalities contribute a significant amount to the GVA/GDP of the province. These areas are also where most of the economic growth and new developments/investments are happening.**
Concentration point	This refers to Ermelo's unique spatial location in that a number of major arterial routes go through Ermelo both east-west (N17, R65) and north-south (N11, N2, R36, R39) arterials. It is also a concentration point for government departments (most sector departments' regional offices for Gert Sibande are located in Ermelo), and the district municipality (Gert Sibande) is located in Ermelo.

From Map 1 it can be concluded that the road linkages play a significant role in tourism. Each corridor links a tourist destination, for example the Maputo Corridor links Gauteng to the Kruger National Park and Maputo. Most of the roads link the tourism destinations with one another; thus, it is of the utmost importance that the roads be maintained and developed regularly.

Map 1: Regional Spatial Development Initiative
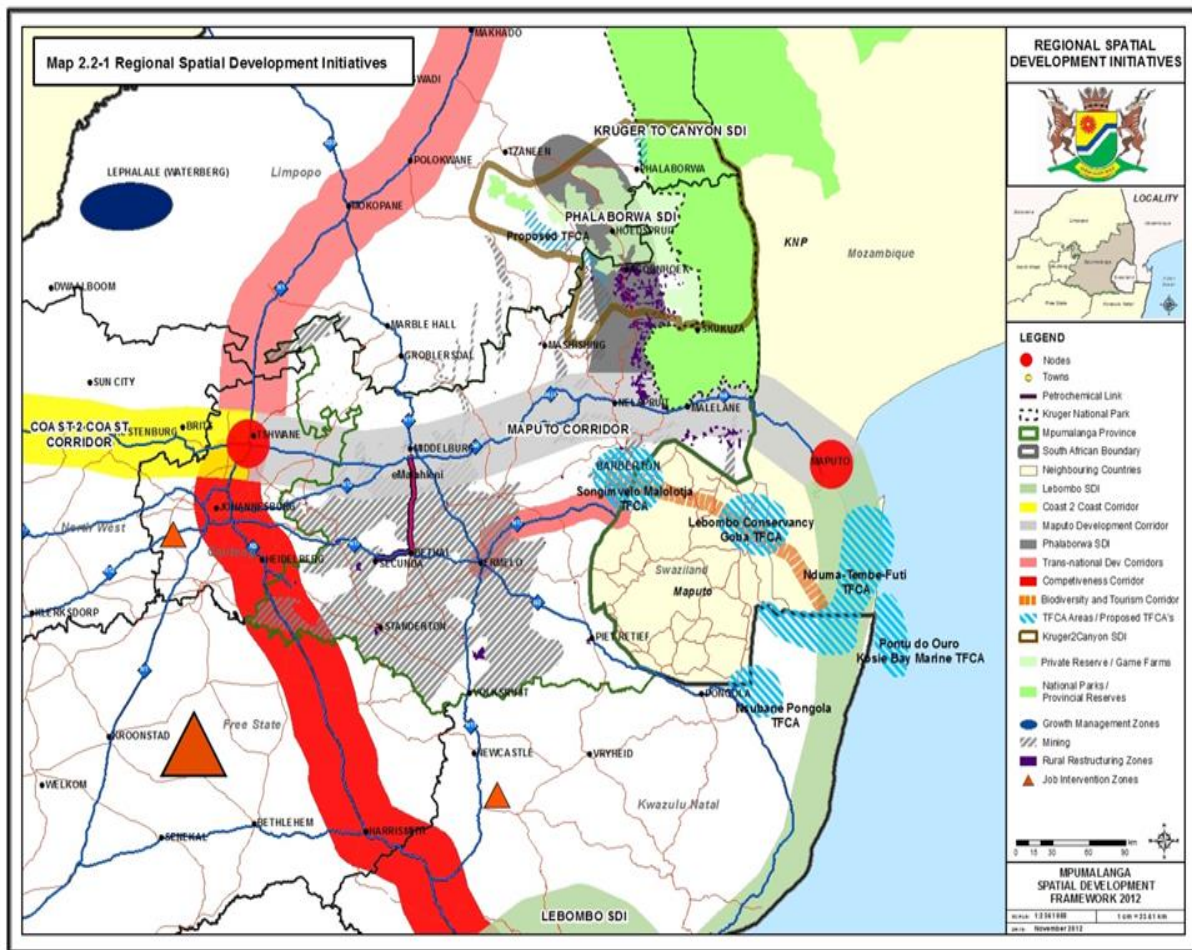
Source: Mpumalanga SDF 2013

It is also evident that one of the most important links is the Maputo Corridor link between Gauteng and Mozambique. In terms of economic development, the Phalaborwa Spatial Development Initiatives (SDI) play a significant role, which seeks to transform small-scale mining activities in parts of Mpumalanga and Limpopo from being a subsistence activity into an economic empowerment tool. The promising Trans Frontier Conservation Area (TFCA) between Mpumalanga and Swaziland as well as the Kruger National Park to Canyons Biosphere Region spans across parts of Mpumalanga and Limpopo. This can be a valuable link to promote conservation, manufacturing and tourism. The N17 Development Corridor can contribute significantly to trade between SA and Swaziland and the Ermelo-Richards Bay Freight Corridor links Mpumalanga to the harbour, which will ultimately promote international trade.

Mpumalanga's accessibility to tourists from Mozambique, Gauteng, Swaziland and KZN is evident. Mpumalanga, as a province, has a large road network connecting all tourism points as well as the neighbouring regions, one of the most important linkages is the Kruger International Airport in Mbombela. Economic growth in the neighbouring

regions can be related to Mpumalanga's tourism routes and linkages. Some neighbouring regions are dependent on Mpumalanga's high tourism capacity in terms of job opportunities and road linkages to visit family members.

Mpumalanga is also dependent on neighbouring regions like Swaziland, Gauteng, KwaZulu-Natal (KZN) and Mozambique. This is due to the high number of people (tourists) coming from these regions to Mpumalanga. Development of more roads linking Mpumalanga to other areas in these regions will benefit all the provinces and neighbouring countries economically. The diverse range of tourism attractions contribute to economic growth from a regional (Gauteng, Swaziland, Mozambique, KZN) stand point.

Network linkages, in general, can have the following positive outcomes:

- Networks can play a significant role in destination competitiveness since they facilitate access to knowledge transfer, resources, markets, and technologies, which is particularly important for emerging destinations[1]
- Inclusion and exposure to variety of tourism products
- Information and knowledge sharing
- Stronger 'packaged products'
- Enhance the dynamics of tourism by offering more valuable visitor experiences

2.3. Mpumalanga's Economy in General

The economy of Mpumalanga consists of various activities. The main activities in the province, according to Global Africa Network, are agriculture and mining. Agriculture accounts for 3.3% of the gross domestic product (GDP) of Mpumalanga and contributes an estimated 12% towards employment (total of 89 000 people). Most of the soil in Mpumalanga has a medium capability, which provides potential in terms of agricultural development (livestock or crop farming), except for the soil located at the border of the Gert Sibande DM and the Nkangala DM.

This soil has a high capability, which gives the opportunity for development to increase the GVA contribution of agriculture. Mining contributes the most to the province's gross value added (GVA). Mpumalanga also hosts large manufacturing companies in terms of steel and aluminium which contributes significantly towards Mpumalanga's economy.

As illustrated in the figure below, other main contributors towards the GVA of Mpumalanga include wholesale, retail and tourism. Tourism has been identified as one of the main drivers for the economy of Mpumalanga. The underperforming industries comprise of forestry and fishing as well as electricity, gas and water. These sectors show low growth, and thus they require attention and development.

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[1] Costa et al. (2008)

Figure 1: GVA contribution per sector for Mpumalanga 2015-2016 (at 2010 constant prices)
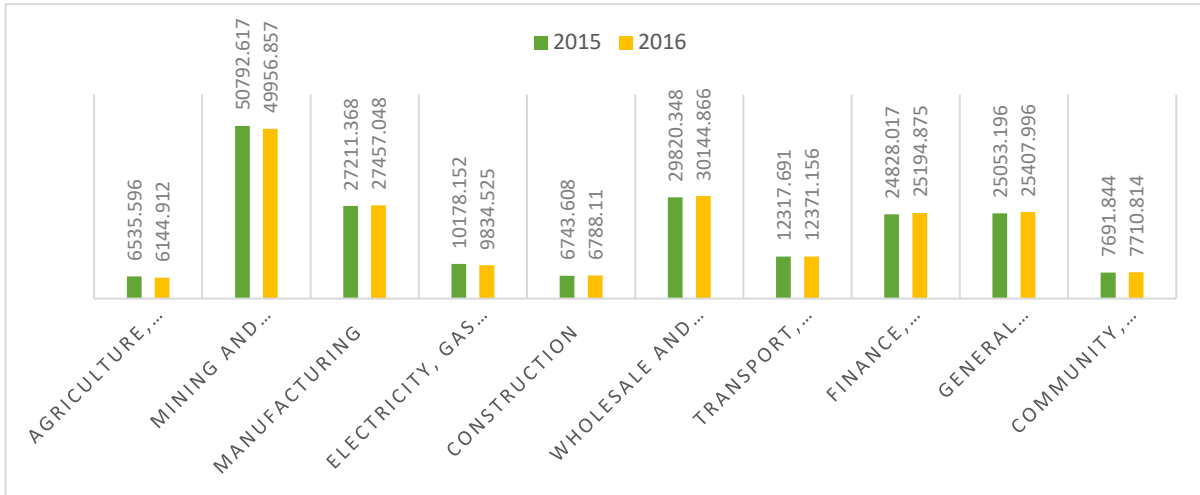
Source: Quantec 2016

The municipality that contributes the most is eMalahleni (see Figure 2). This is due to the extensive mining activities that take place in the region as mining is the main contributor towards the province's GVA. Tourism and mining empower employment in eMalahleni, thus contributing towards the economic growth of the region. Another municipality that contributes significantly towards the GVA is the City of Mbombela. This is due to the high amount of forestry activities that take place within the region, which add value towards the manufacturing sectors.

Figure 2: Municipalities' share in Population and Gross Value Added (at 2010 Constant Prices) for 2016
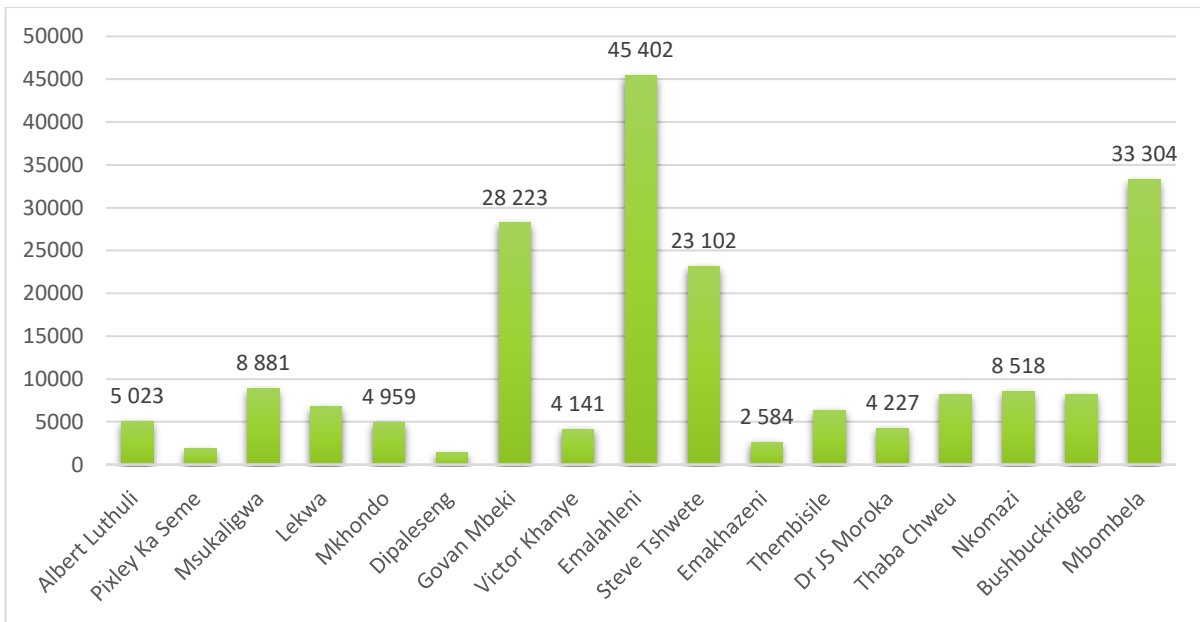
Source: Quantec 2016

The lowest contributing municipality is Dipaleseng. This can be due to the rural nature of the region and also indicates underdevelopment within the municipality. Farming, especially, plays a role in this municipality. There are opportunities for agricultural development in terms of switching from subsistence farming to commercial farming.

In 2015-2016, the province of Mpumalanga's GVA grew by -0.08%, which is lower than the national growth rate (0.38%). In 2015-2016, the GVA growth rates for Gert Sibande were 0.75%, -0.42% for Nkangala and -0.38% for Ehlanzeni. These numbers reflect that the districts' economies are vulnerable to external global circumstances such as the ones experienced during the global economic downturns in 2008-2009.

2.3.1. Employment in Mpumalanga

❖ **Employment status of Mpumalanga**

Illustrated in the figure below, the labour force participation numbers are above 50%. The labour force is made up of the employed and the unemployed. The remainder—those who have no job and are not looking for one—are counted as not in the labour force. Many who are not in the labour force are going to school or are retired. Family responsibilities keep others out of the labour force. The lowest labour force contributions are for Ehlanzeni; this is due to the high amount of land being used for wildlife purposes. We can conclude than interventions that relate to education specifically need to take place to excel economic growth in the Ehlanzeni district. The relatively small numbers for labour participation indicate a lack of work or the lack of will to work.

❖ **Unemployment status of Mpumalanga**

According to Stats SA, an unemployed individual is defined as a person (aged between 15-64) who:

- Has not worked within the last seven days
- Wants to work and is available to start within two weeks
- Took active steps to look for work or business in the preceding four weeks

Figure 3: Labour force participation 2016
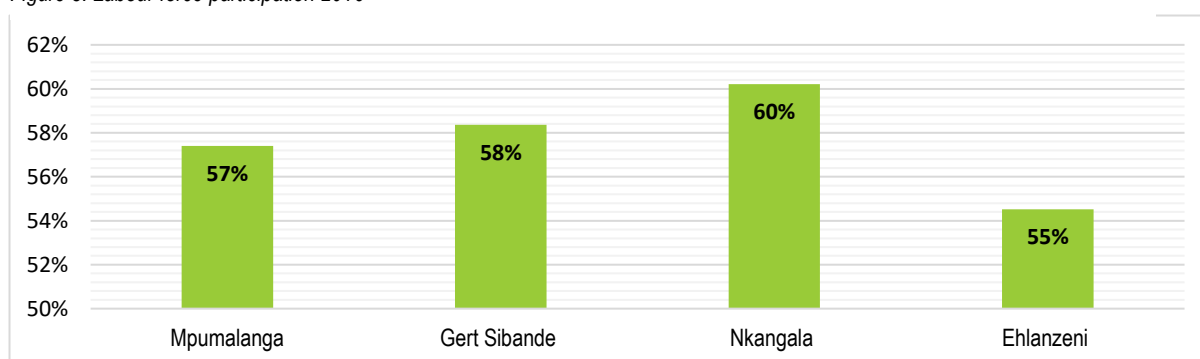
Source: Quantec 2016

Mpumalanga's employment rates are relatively low. It is a concerning factor for Mpumalanga and SA as the low employment status indicates low economic growth and underdevelopment of sectors. Development and utilisation of Mpumalanga's abundant resources is needed to improve the low employment rate. The low employed status of Mpumalanga can be due to the negative GVA growth rate of -0.08%, which indicates that no development took place to utilise resources.

Economic interventions should be considered to assist with decreasing unemployment as well as encouraging people who are not economically active to participate in the economy in order to decrease their dependence on the working population. Factors that play a role in low employment numbers include low levels or the lack of education and skills development. The figure below illustrates the unemployment rates of the main districts in Mpumalanga as well as the total percentage of unemployment for the province. Ehlanzeni has the highest unemployment rate at 31%.

Figure 4: Unemployment rate 2016
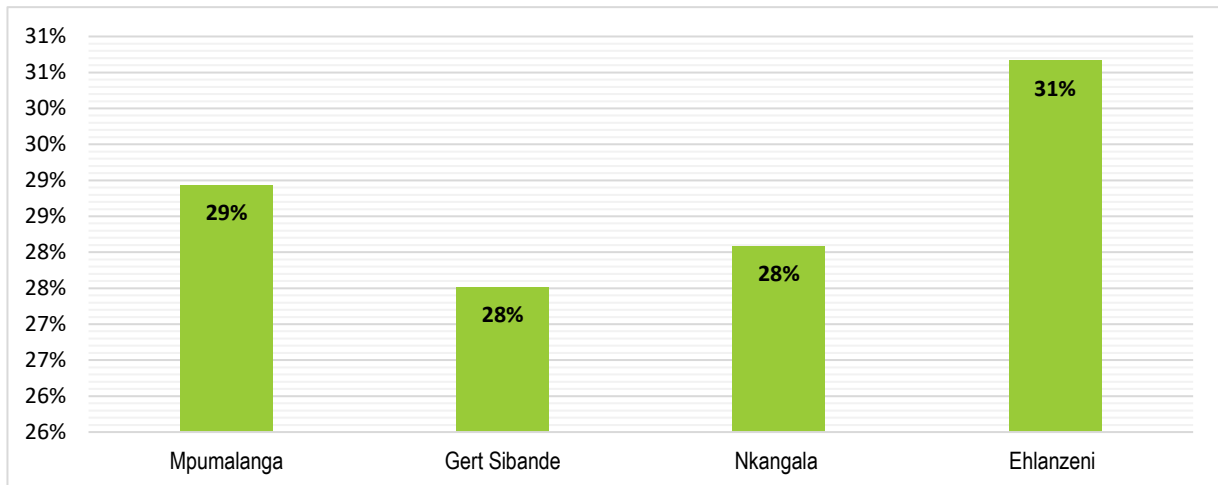
Source: Quantec 2016

2.3.2. Education and Literacy Levels in Mpumalanga

❖ **Education Rates**

Education is key to developing a strong economy. Providing that education numbers and levels increase, so will the economy of a province. Human capital is an important input into the economy; however, productivity and growth in the province can most definitely be improved upon. The table below shows slight decreases on some schooling levels. The rate can be exponentially increased through betterment of schools and education programmes. The sparse numbers of tertiary education can be due to a few factors. The lack of financial support can cause difficulties in terms of funding tertiary education. The second factor can be that the individual lacks the academic qualifications in order to be promoted to tertiary education. These factors can be enhanced through the development of better and affordable education systems in the province, increasing tertiary education opportunities can also be developed through more bursary programmes.

Table 2: Average level of education level completed 2015-2017

	No schooling	Primary	Some secondary	Matric	Tertiary
2015	10%	25%	27,3%	17,9%	5,2%
2016	9,9%	25,2%	27,2%	18%	5,2%
2017	9,9%	25%	27,2%	18%	5,2%

Source: Quantec 2017

For a growing and developing economy, what is needed is an education sector that focuses on improving the quality of education and fostering skills. Thus, the province's economy will be more productive as the proportion of educated workers increases.

❖ **Literacy Rates**

Education and sufficient literacy rates are a source of growth and increasing productivity. Still deficiencies in the quality and relevance of education and skills are negatively impacting the potential growth of the economy. The adult literacy rates of Mpumalanga are not on a satisfactory level with only 28.5% of adults being literate.

Figure 5: Adult literacy rates for Mpumalanga 2016
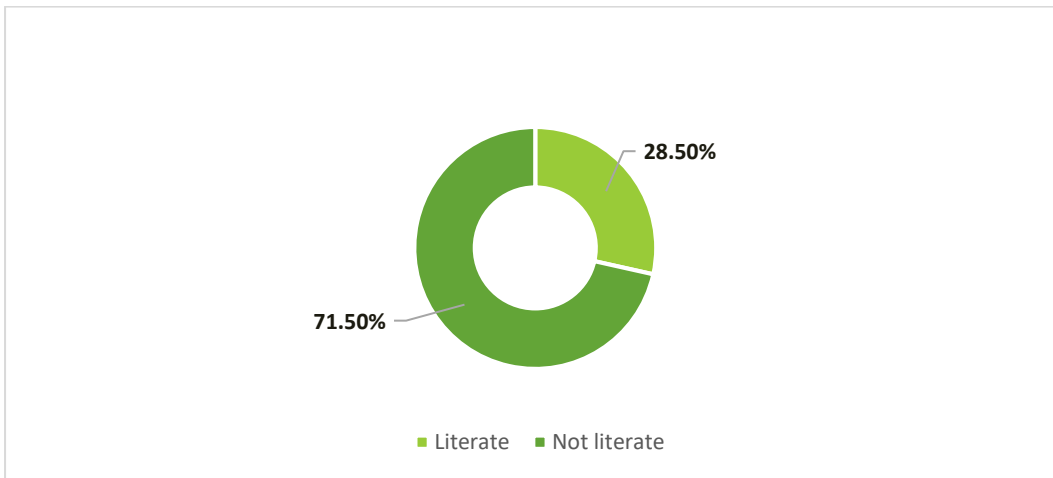
Source: Stats SA Educational Enrolment and Achievement, 2016

Figure 6: Municipalities with the highest illiteracy rates, 2016
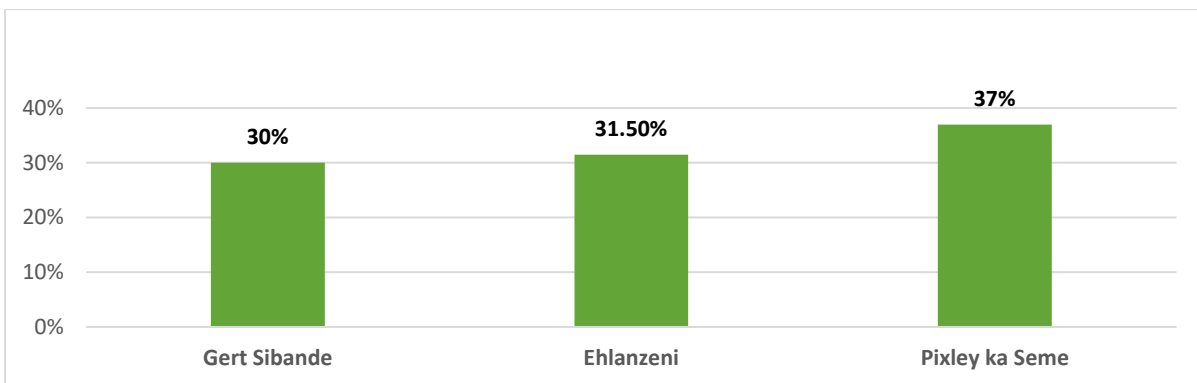
Source: Stats SA Educational Enrolment and Achievement, 2016

The municipalities with the highest illiteracy rates in the province are the Gert Sibande DM, the Ehlanzeni DM and the Pixley ka Seme LM with 30%, 31.5% and 37% respectively. Programmes to support and enhance basic literacy rates should be initiated to accommodate people of all ages.

Table 3: Positive and negative impacts of education and the workforce

Educated	Uneducated
• Labour market success • Increase earning potential for workers • Skilled labour (through formal education) encourages the development of more value-added industries, such as advanced or modern manufacturing	• Skill gaps causes differing levels of economic growth between regions • Unemployment due to skills mismatch can lead to high levels of inequality • Limiting the impact of the new technologies on productivity and economic growth

2.3.3. Tourism's Value for Mpumalanga

An economic model was developed to determine the tourism economic contribution to Mpumalanga's economy. The economic model will be based on the most recent National Tourism Satellite Account[2] and the Provincial SAM. The economic model will run with simulations, through applying SAM multipliers, which undertakes model projection and quantifies direct, indirect and induced economic impacts of the tourism economy. The modelling exercise was completed in light of the following assumptions:

- The technical coefficients of the SAM model remain constant for the period of analysis, i.e. no structural changes in the economy are experienced.

- The direct expenditure model input is based on the total tourist expenditure generated within the international and domestic tourist market.

- The estimated tourist expenditure generated by the province and its regions is distributed within the supply sub-sectors based on the expenditure behaviour of both international tourists and domestic tourists.

- The base data used within the expenditure breakdown are sourced from South African Tourism's supply database, international tourists' analysed data, and Statistics South Africa's Domestic Tourism Survey.

- The input calculations are based on the expenditure breakdown figures applied to the National Tourism Satellite Account inbound tourism expenditure and domestic tourism expenditure figures.

- The sub-sector expenditure figures are reallocated to their suitable SIC category to be feed into the SAM model.

Apart from being one of the fastest growing sectors, tourism plays a vital role on a regional level as a development tool for various tourism-related industries. Amongst others, tourism has a positive impact on gross income, production and poverty alleviation through its contributions to employment. According to StatsSA (2017), the tourism direct gross domestic product (GDP) increased from R114 419 million in 2014 to R118 928 million in 2015 (3,9%), contributing 3% of the national GDP for South Africa. Taking the above-mentioned assumptions into consideration, the economic model estimated that the tourism sector will contribute in total R20.3 billion in GDP to

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[2] The final 2012 and provisional 2013 and 2014 TSA is due for release on 17 February 2016.

Mpumalanga's economy in 2017/18. It is estimated that the Mpumalanga tourism sector directly contributes R9.04 billion in GDP, which represents 8% of the direct GDP generated by tourism in South Africa.

Figure 7: GDP contribution of tourism in Mpumalanga (million)
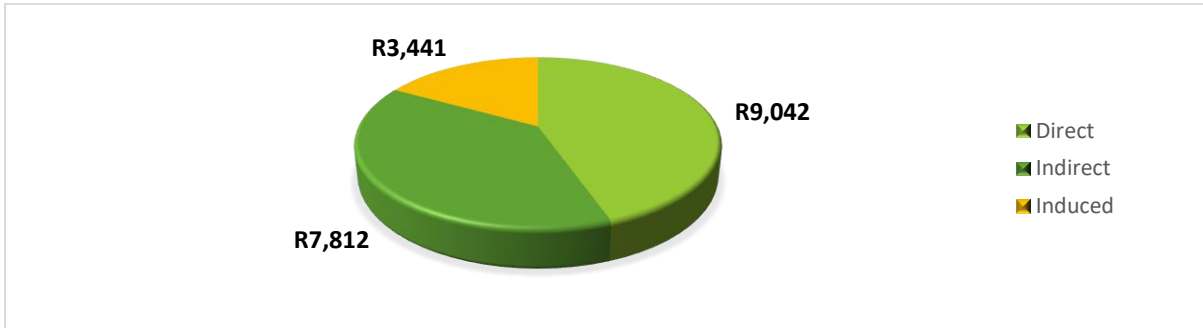
Total employment contribution for 2015 was estimated at more than 2.7 million jobs in South Africa's tourism sector, with the direct job contribution estimated at 711 746 contributing 4.5% to South Africa's total employment.[3] The economic model for the Mpumalanga tourism sector estimated that a total of 76 989 jobs have been generated for 2017/18 by the sector, representing 7% of the total employment in Mpumalanga.

Figure 8: Employment generated by tourism in Mpumalanga
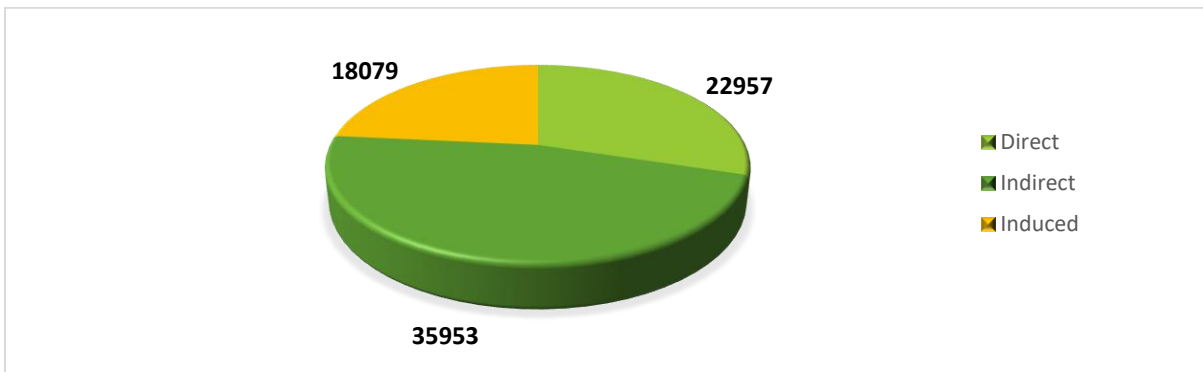
As a recognised income and jobs generator, tourism is an established source of welfare. For this reason, it is essential for government to focus on key areas such as market penetration, accessibility, visitor experience and destination management. The ultimate goal is to achieve the outcome set by the National Development Plan (NDP) and the NTSS by taking into consideration the state of tourism to enhance the sector's performance and strengthen Mpumalanga's competitiveness as a tourism destination

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[3] StatsSA. Tourism Satellite Account for South Africa, final 2013 and provisional 2014 and 2015.

Section 3: Status Quo of the Tourism Sector

3.1. Tourism Demand

3.1.1. International Tourism

Mpumalanga provides an all-in-one 'African experience' for international tourists. International arrivals to the province experienced slight growth in 2016 with 1 427 795 arrivals compared to the 1 300 270 arrivals in 2015. The increases in arrival volumes show that the province remains sturdy as a tourism destination competitor. For as long as results keep growing in a positive direction, Mpumalanga should invest in, encourage and pioneer development in this sector.

Figure 9: International tourist arrivals to Mpumalanga 2013-2016
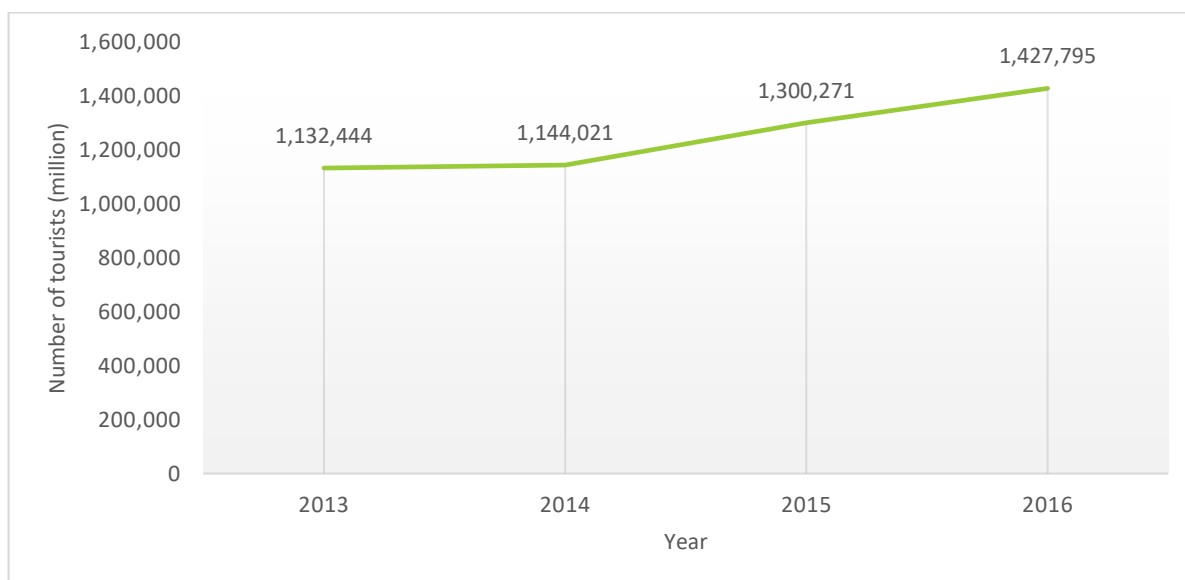
Source: SAT Annual Report 2016

Africa land markets represented the largest source market to Mpumalanga with a total of 72% of visitors in 2016. The second biggest market was Europe with 17%. The amount of first timers to the province presented a 2.3% growth with a total of 19.7% compared to the 17.4% of 2015. An increase in first timers is always a good sign as it shows that people are interested in exploring what Mpumalanga has to offer and that the tourist product is relevant. The province also has strong representation in terms of tourists who visited the province for the second and third time. Compared to 2015, the percentage of tourists remained the same at 15.8% in 2016. Tourists visiting for the fourth or more times also presented quite a big portion at 15.7% in 2016. Overall, repeat visits to the province show promising results and bear evidence of visitor satisfaction.

In terms of the annual spend of international tourists by province during 2015 and 2016, Gauteng represented the largest portion of total international spend in South Africa with a total just over R34.3 million, whilst the Western

Cape came in second reaching R18 million. In Mpumalanga, tourists spent R4.7 million, placing the province in 4th position.

Experiences are based on a combination of travel motives and the activities that tourists participated in. The most positive experiences coincide with the number one purpose of visit- visiting friends and relatives. The second-best experience points to the extraordinary scenic views that this country has to offer. A very strong tourist-drawcard is the Big 5 and wilderness-aspect of Africa. This gives Mpumalanga that extra boost due to the abundance of wildlife in the province and of course, the Kruger National Park.

Figure 10: Top most positive experiences for international tourists 2015-2016
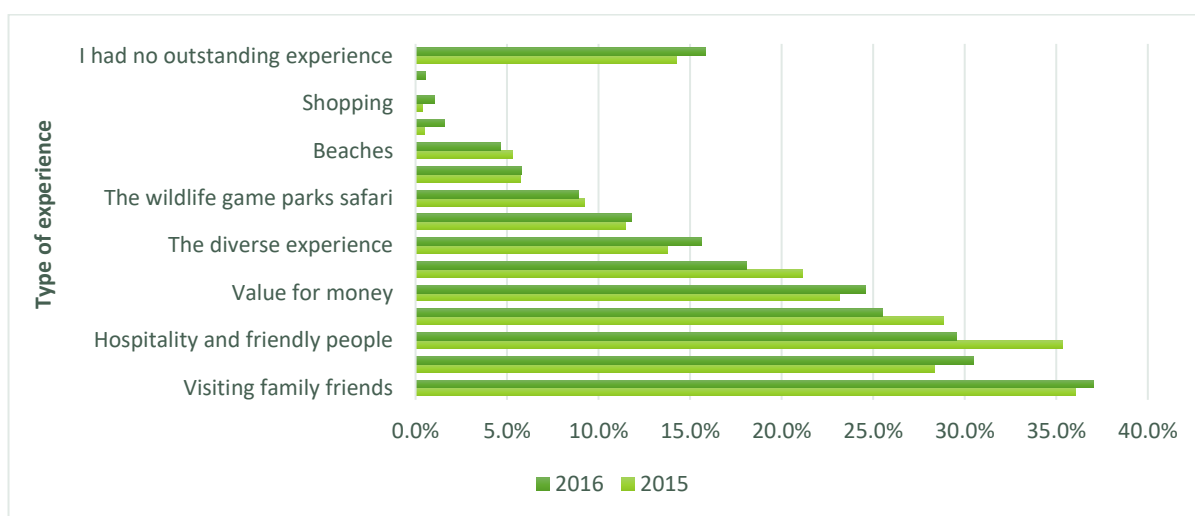
Source: SAT Annual Tourism Report 2016

Another positive experience for visitors that is quite unique to Mpumalanga, is the heritage and cultural aspect of its tourism products. The South Africa Yearbook 2015/2016 states that Heritage and Cultural Tourism is the fastest emerging competitive niche within domestic and international tourism markets. This category accounts for 40% of international tourism. Mpumalanga has an array of cultural/historical villages (Shangaan Village, Ndebele Village, Botshabelo Mission station and historical village) and the Matsamo Cultural Park informing tourists on the Swazi culture and the significance of their traditions and customs[4]. Negative experiences that tourists listed include: poor food facilities, personal safety, poverty (beggars) and price complaints (products that are too expensive).

Mpumalanga experienced a few seasonal 'highs' during 2016 in the months of March and May with 17.2% and 15.3% of international trip respectively. On a positive note, the province did not show obvious fluctuation in seasonality results, which is ideal. Reasons for seasonality can be divided into two categories i.e. 'Natural' and 'Institutional/Cultural'. Natural include weather impacts, climate and geographic location, whereas the latter refers to holidays, religious events, sporting seasons, activity opportunities, physical attractions and changes in travel habits[5].

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[4] Mpumalanga Tourism and Parks Agency website
[5] CRC for Sustainable Tourism 2008

Figure 11: Mpumalanga's percentage international trips per month 2016

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2015	10.9%	12.6%	11.1%	14.6%	17.3%	15.4%	14.2%	17.2%	16.2%	16.0%	16.2%	14.4%
2016	14.8%	15.0%	17.2%	13.4%	15.3%	14.1%	13.2%	14.4%	13.4%	14.8%	14.5%	10.7%
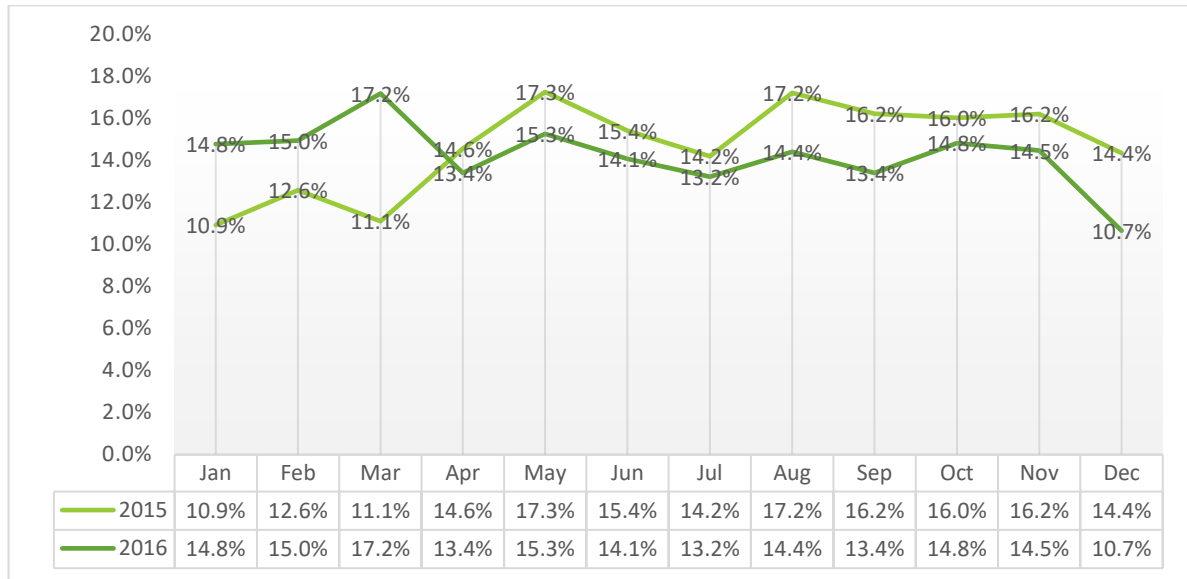
Source: SAT Annual Tourism Report 2016

3.1.2. Domestic Tourism

Domestic tourism to Mpumalanga suffered a substantial decline in 2016, reaching 1.6 million in domestic arrivals compared to the 2.1 million arrivals in 2015. With the direct influence on revenue generated from tourism, Mpumalanga experienced the decline on an economic front as well. The declining market share was due to insufficient marketing spend, fragmented programmes and initiatives, lack of skills and poor-quality service, shortcomings in infrastructure, poor institutional relationships and lack of product.[6]

Figure 12: Domestic tourist trips to Mpumalanga 2009-2016
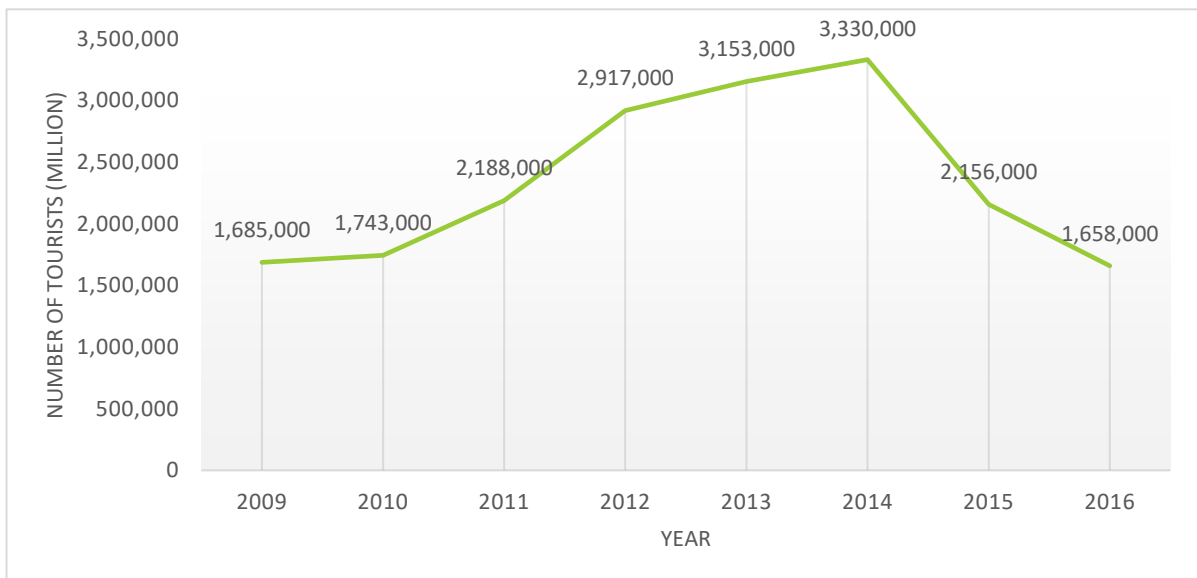
Source: SAT Annual Report 2016

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[6] MTPA official website- www.mtpa.co.za

Most of the domestic visits to Mpumalanga in 2016 were for holiday purposes. It was also the only section that recorded growth from 201 to 2016. This category represented 15% of domestic trips in 2016 (2% more than in 2015). A total of 6% (2% less than in 2015) of domestic trips were taken to visit friends and relatives. Travelling for business was a strong motivation in 2015 at 9%; however, it experienced a significant decline to reach 3% in 2016.

When it comes to spending by domestic tourists in SA, in comparison to the other provinces, Mpumalanga falls in 6th position with a total of R1.7 billion in domestic expenditure. This figure is a drop from 2015, where domestic spend was recorded at R1.8 billion for the province. The leading province was Limpopo with a remarkable expenditure of R6.6 billion for 2016. Gauteng followed with a noteworthy R5.1 billion in domestic spend and KwaZulu-Natal took 3rd place with R4.5 billion. Overall, most provinces showed growth in domestic expenditure, especially Gauteng who jumped from R2.3 billion in 2015 to R5.1 billion in 2016 in domestic expenditure.

Figure 13: Percentage share of total trips per month to Mpumalanga in 2016
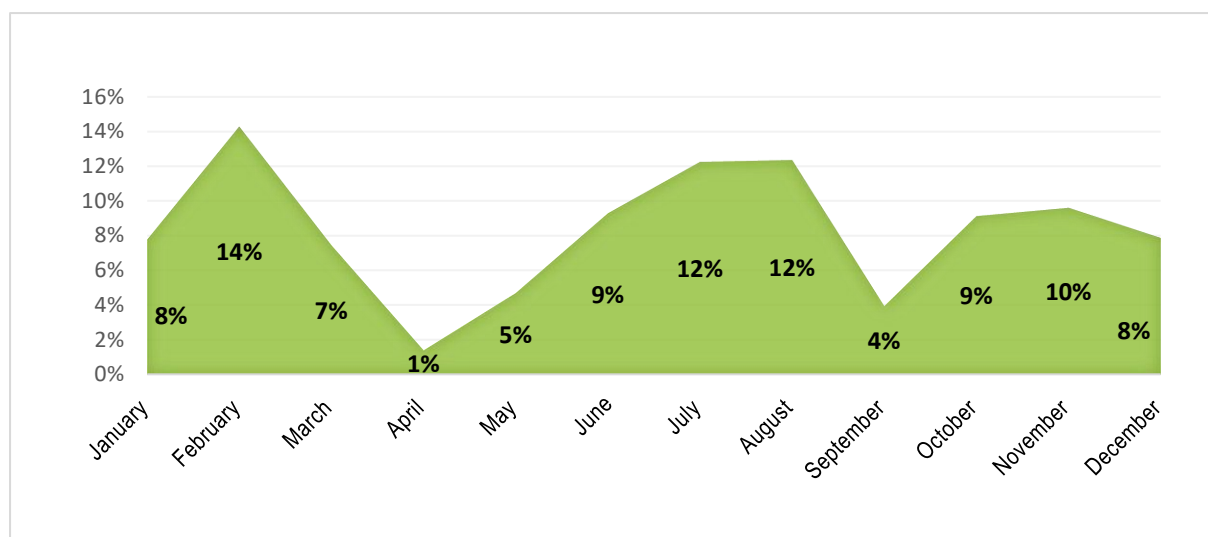
Source: SAT Annual Tourism Report 2016

The monthly tourist volumes fluctuated quite intensely. In February, Mpumalanga had the most domestic trips at 14% followed by another influx of 12% over July and August. The lowest number of domestic trips took place in April and September at 1% and 4% respectively. For 2016, a 'mean' of 9% would've been ideal, rather than the seasonal highs and lows following directly after one another. Annual peaking of tourism activity during a few hectic weeks or months is likely to result in inefficiency within the industry and is a greater burden on the physical and social resources of the destination area and therefore an important contributor to the carrying capacity problem.[7]

Most of the domestic visits to Mpumalanga in 2016 was for holiday purposes. It was also the only section that recorded growth from 2015-2016. As portrayed in Figure 22, this category represented 15% of domestic trips in 2016 (2% more than in 2015). A total of 6% (2% less than in 2015) of domestic trips were taken to visit friends and relatives. Travelling for business was a strong motivation in 2015 at 9%, however in 2016 it experienced a significant decline to reach 3% in 2016.

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[7] Seasonality in the Tourism Industry- Impacts and Strategies (2016)

Figure 14: Domestic purpose of Visit for Mpumalanga province2015-2016
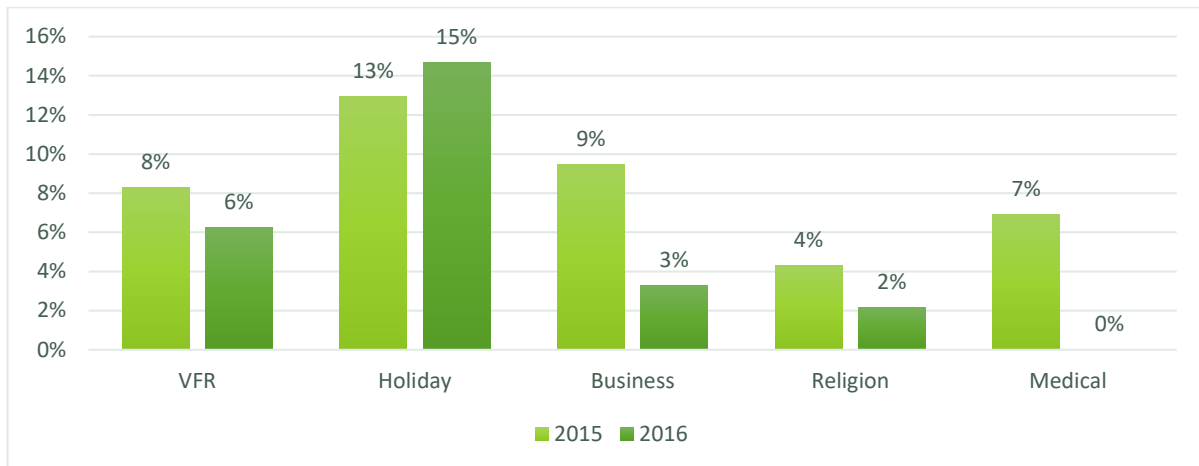
Domestic tourist's reasons for not travelling in 2015-2016 are listed in Figure 15. The two most prominent reasons for not travelling are more based on personal circumstances, rather than complaints about the tourist destination. The number one reason relates to finances. 36.7% of domestic tourists argue that in general, finances prevent them from travelling i.e. it is too expensive for them to travel. The second reason relates to the physical location of the tourists' relatives or friends. 30.4% explained that they live within 40 km from their loved ones and therefore there is no need to travel far to visit them. Being 'too busy' at work/school was the third main reason, with a total of 9% of domestic tourists agreeing to this.

Figure 15: Main reasons for not travelling 2015-2016

3.2. Tourism Supply

The following section provides an overview of the tourism supply distribution and performance within Mpumalanga. It focuses on what attractions and activities Mpumalanga offers to tourists and looks at the province's accommodation industry (e.g. grading of establishments), general accessibility and transport. The tourism industry consists of three main categories of services and products that it provides: 1. Accommodation, 2. Hospitality and related services and 3. Travel and related services. The table below gives examples of each category, all which are supplied by the province.

Table 4: Type of tourism products available in Mpumalanga

Accommodation	Hospitality and Related Services	Travel and Related Services
Hotels	Restaurants	Tour wholesalers
Guest houses	Conference venues	Tour operators
Game lodges	Professional catering	Travel agents
Bed and breakfast (B&B)	Attractions	Tourist guides
Self-catering	Consulting/professional services	Car rental companies
Caravan and camping		Coach operators
Backpacker and hostel		
Country house		

❖ **Travel and related services**

These services involve the planning, booking, organisation and documentation of travel arrangements for clients. The sharing economy, the rise of the millennial traveller and the use of mobile are increasing traveller expectations of the user experience associated with travel.[8] Mpumalanga boasts with a wide variety of tour operators, travel agencies, tour guides and coach operators to ensure ease of access of planning and booking a trip.

❖ **Hospitality and meeting industry**

Globally, South Africa as a 'meetings destination' moved up four ranks from 2015 to 34th place in 2016. This also positioned South Africa as the leading business events destination in Africa.[9] In the Africa Ranking for number of

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[8] Bandara & Silva (2016)
[9] SAT Annual Tourism Report 2016/2017

international meetings per country, South Africa placed first in 2016 with a total of 125 meetings. In general, the meetings, incentives, conferences and exhibitions (MICE) industry is experiencing growth each year. Restaurants in the province cater for fine dining, fast food and local cuisine at affordable prices. Restaurant settings range from bushveld, to country club to river side.

3.2.1. Attractions and Activities

Attractions and activities play a very important motivational role when it comes to choosing a travel destination. Tourists choose a destination based on the amount and type of experiences they may possibly have at the destination. Mpumalanga takes pride in its scenic beauty and abundant wildlife and offers visitors a variety of experiences including hiking, bird-watching, elephant-back safaris, visits to animal centres and photography tours.

Map 2: Map of Mpumalanga's key attractions
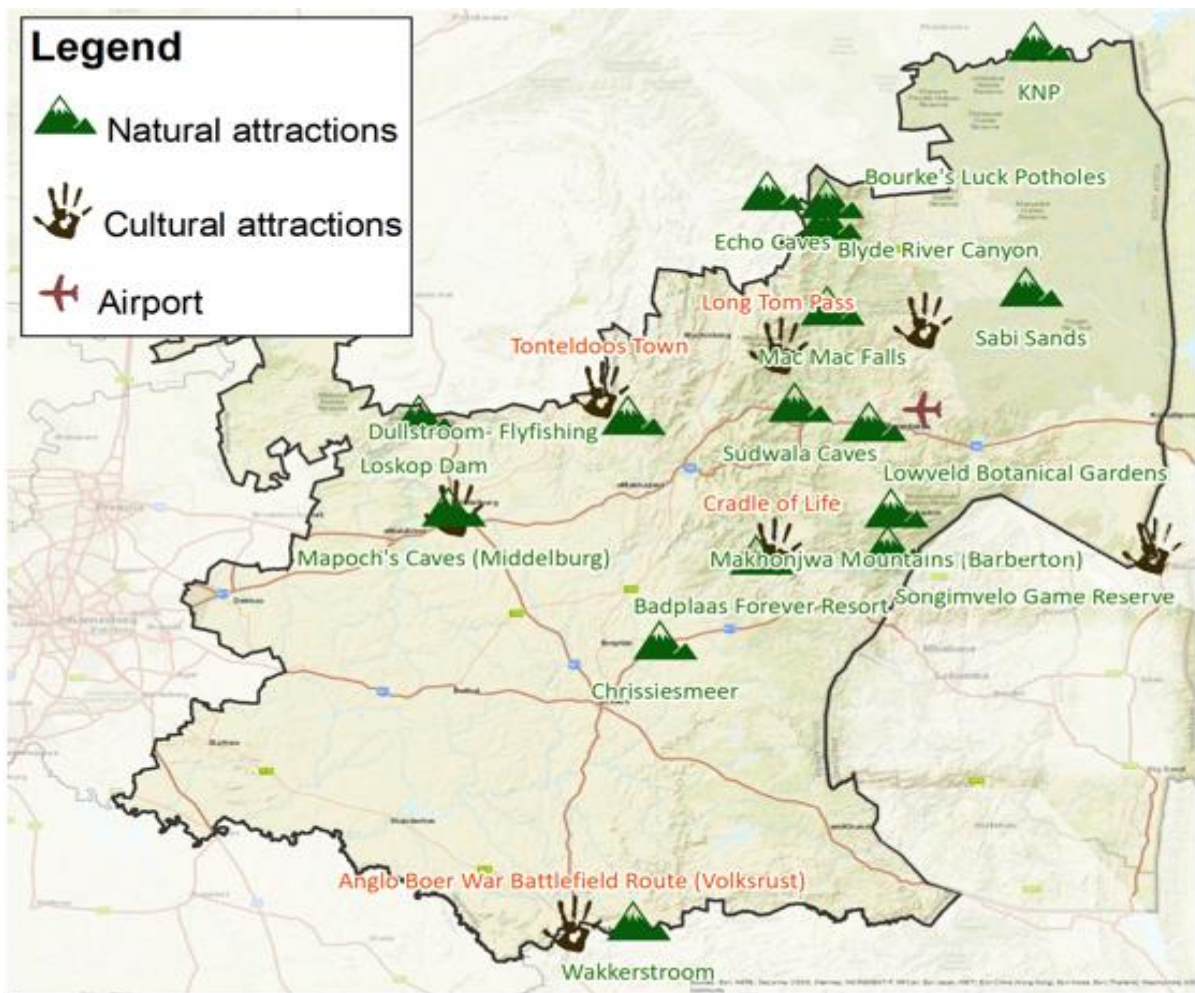
Source: Arc Map 2016

According to the SAT Annual Tourism Report 2016, the top three attractions in the province are the Kruger National Park, Blyde River Canyon (the world's third largest canyon) situated on the Panorama Route, all of whom offer exceptional natural phenomena.

Table 5: Key natural tourist attractions and their spatial status within Mpumalanga

Resource	Description
Forests, mountains, waterfalls, special flora and wildlife	These resources are generally located in Ehlanzeni DM.
Kruger National Park	Kruger National Park is located in the Ehlanzeni DM and is very popular amongst international and domestic tourists.
Blyde River Canyon and Drakensberg Escarpment	Blyde River Canyon is the world's third largest "green canyon". There are many view points along the escarpment and includes famous attractions such as God's Window.
Lowveld Botanical Gardens	The Gardens are situated in the Mbombela LM and have several rare and indigenous wild flowers.
Makhonjwa Mountains and Blyde Mariepskop Complex	These sites have been nominated as a World Heritage Site and boast with 2 100 different species of fauna and flora.
Sudwala Caves	These caves are the world's oldest dolomite caves.
Echo Caves	The Echo Caves are situated in the Molopong Valley and are home to ancient San rock engravings.
Mapoch's Caves	The Mapoch's Caves are located near Roossenekal and served as a stronghold for local tribes for hundreds of years.
Chrissiesmeer	Chrissiesmeer is Southern Africa's largest natural freshwater lake district. It is located in the Gert Sibande municipal region. This lake district has 270 lakes and pans and attracts approximately 20 000 flamingos annually. The wetland also attracts 82 species of water birds as well as 170 other bird species.

Source: Economic Interventions of Mpumalanga

Table 6: Key historic and cultural tourist attractions and their spatial status within Mpumalanga

Wakkerstroom	This wetland is also an important bird watching destination.
Cradle of Life	Situated on the outskirts of Badplaas, this World Heritage Site is the location where some of earth's earliest life forms have been discovered in the adjacent Barberton mountains. A new geo-trail is also located between Barberton and Bulembu.

Lion Cavern and Dumaneni in the Ngwenya Mountains	Lion Cavern and Dumaneni boast with the earliest recorded evidence of humanoid settlement. Large-scale mining of red ochre also occurs here.
Botshabelo Mission Station	An accessible site where San and Khoi-San cave paintings can be viewed.
Stone Ruins	The ruins are located at Legoya, near Ermelo and dates between 1 500 BC and colonial times. The origin of these ruins is unknown.
Fort Merensky	The fort, located near Middelburg, was built in the 1860s to provide refuge for Christian converts fleeing from their own communities.
Ruins of 19th century capital of the Ndzundza Ndebele Kingdom	Located at Erholweni near Roossenekal.
Historic towns and Anglo-Boer War sites	Emgwenya, Dullstroom, Entokozweni, Mashishing, Chrissiesmeer, Long Tom Pass, Bergendal, Emalahleni.
Former gold rush towns	Barberton, Kaapsehoop, Eureka and Pilgrim's Rest (Pilgrim's Rest has been declared a national monument).
Historic churches	St. Peter's Church in Sabie, Thaba Chweu LM.
Samora Machel Memorial	Located at the Mbuzini crash sites near Komatipoort.
Modern buildings	Provincial government and legislative building in Mbombela as well as the Mbombela Stadium built for the 2010 Soccer World Cup.
Ndebele museums and cultural villages	Kghodwana Cultural Village, Ndzundza Mabhoko Royal Kraal, Botshabelo Historical Village, Little Elephant/Ndlovu Encane Art and Craft Market.
Shona Cultural Village	Located near Hazyview, this village has been built by local Shangaan people.

Source: Economic Interventions of Mpumalanga

Mpumalanga's strongest attraction 'pull-factors' relates to its natural and cultural attributes. Tourists are spoiled with a variety of natural wonders to experience and nature-based activities that include viewing wildlife, visiting parks, caves, waterfalls or driving along mountain passes doing sightseeing. Due to the rapid growth of tourism in developing countries, a vast amount of opportunities exist for the development of tourism niche areas to capitalise on.

One such niche-category is heritage and cultural tourism. Heritage and cultural activities in the province involve visiting cultural villages and museums, interacting with local community members, viewing rock art or visiting arts

and crafts markets. Other categories worth exploring and investing in more include business tourism, religious tourism and events tourism. More and more people are travelling for business reasons and this provides the perfect opportunity for tourists to explore the province while in their 'down time'. The same accounts for religious festivals and other events. Before and after the big event or festival, tourists can visit attractions and take part in activities. These visiting business men, religious tourists and festival goers all make use of accommodation and hospitality services, boosting those tourism categories in the process as well.

3.2.2. Accommodation

There are many types of tourist accommodation that satisfy individual needs (and budgets) of tourists. Hence, tourists have the freedom to choose from a range of accommodation options depending on the type of experience they wish to have at their travel destination. This section provides more insight into the performance of the accommodation industry in Mpumalanga between 2015 and 2016.

The most popular form of tourist accommodation for 2015-2016 was staying over at friends or relatives' houses. This was followed by game lodges, hotels and making use of self-catering accommodation. The popularity of game lodges and to be closer to nature are also reflected in the most popular tourist attractions and activities, which are primarily nature-based.

Figure 16: Mpumalanga type of accommodation preferred by tourists 2015-2016

	Hotels	Guesthouse	Bed and breakfast	Self-catering	Game lodge	Backpackers	Camping	Train or ship	Hospital	Visiting friends and family	Other
2015	522,000	664,000	170,000	448,000	658,000	289,000	115,000	11,000	17,000	2,266,0	789,000
2016	545,000	404,000	107,000	364,000	618,000	95,000	218,000	11,000	32,000	3,998,0	831,000
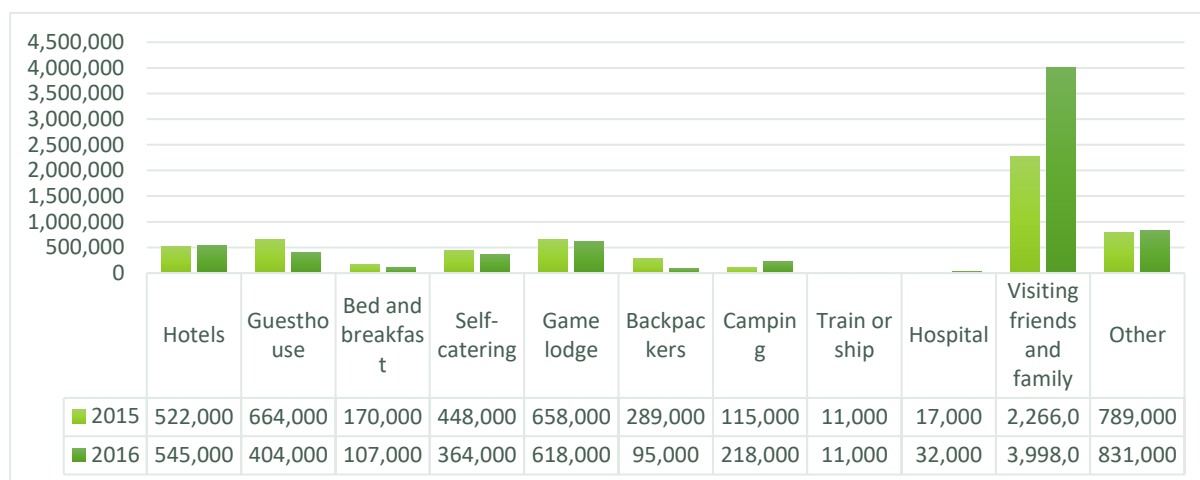
Source: SAT Annual Tourism Report 2016

As most tourists (international and domestic) made use of family/relative hospitality for accommodation, the impact was noticeable when looking at the results for formal bed nights. Both 2015 and 2016 experienced declines in international and domestic bed nights. Domestic bed nights suffered the biggest loss with a decline of 35%, whereas the international bed nights also recorded a decline, however slightly better than the domestic side with a total decline of 8%.

Figure 17: Number of international & domestic formal bed nights in Mpumalanga 2015-2016
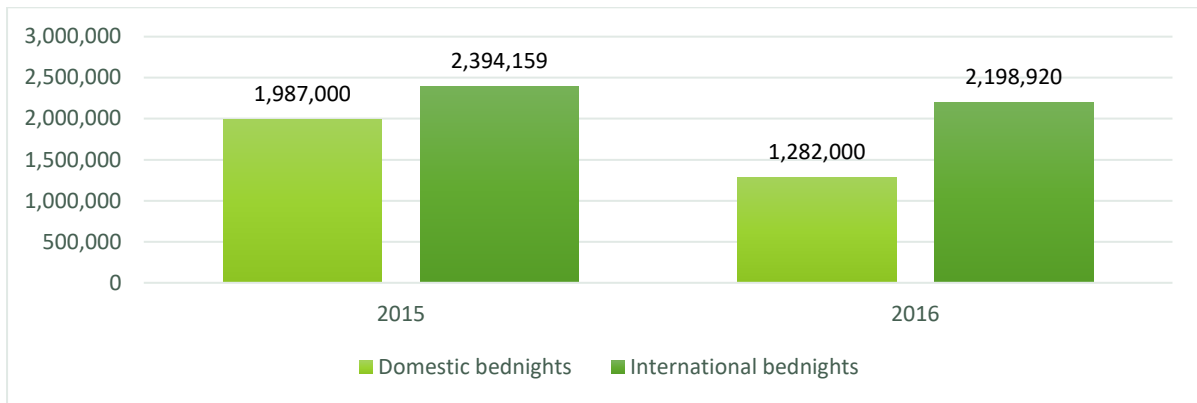
Most of the bed nights for Mpumalanga for 2015 and 2016 were paid with only a small percentage of growth from 2015 to 2016. Unpaid bed nights account for the fact that more tourists visited friends and relatives, which also clarifies the 8% decline in formal bed nights from 2015 to 2016.

Figure 18: Mpumalanga paid vs unpaid accommodation 2015-2016
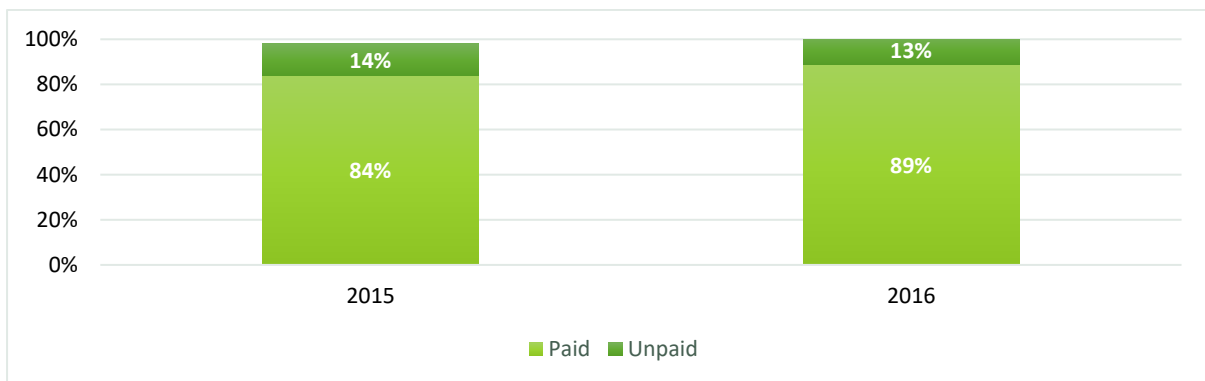
To establish and promote tourist accommodation within the tourism sector, it is beneficial to have your accommodation graded. Grading allows establishments to open their doors to more visitors as people prefer to make use of graded accommodation. The grading guarantees, to some extent, a quality product and experience for the visitor. The level of excellence is represented by the grading level of the establishment. Grading involves benefits relating to procurement, recruitment, legal advice, access to information, training and marketing.[10]

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[10] Tourism Grading Council of South Africa website

Figure 19: Mpumalanga accommodation enterprises graded by the Grading Council of SA
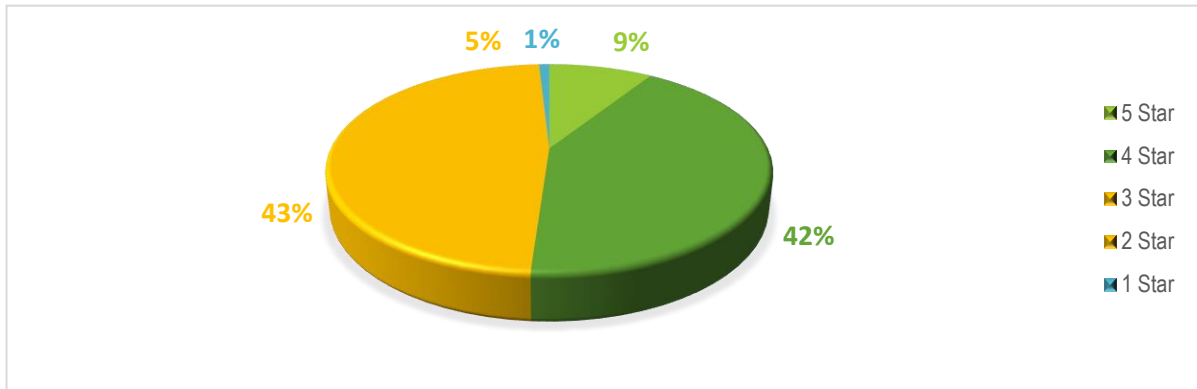
According to the Grading Council of South Africa, a total of 338 accommodation establishments in Mpumalanga are graded (this total excludes the new entries that are still in the process to be graded). Most accommodation establishments (43%) adhere to the grading standards that afford a 3-Star grading, meaning general levels of service are very good. 4 Star accommodation with levels of service that are of superior standard accounts for 42% of graded establishments, and the 5 Star graded establishments, that meet the highest international requirements of luxurious accommodation, are represented by 9% of accommodation establishments in Mpumalanga.

Figure 20: Type of graded accommodation and percentage share of total graded enterprises
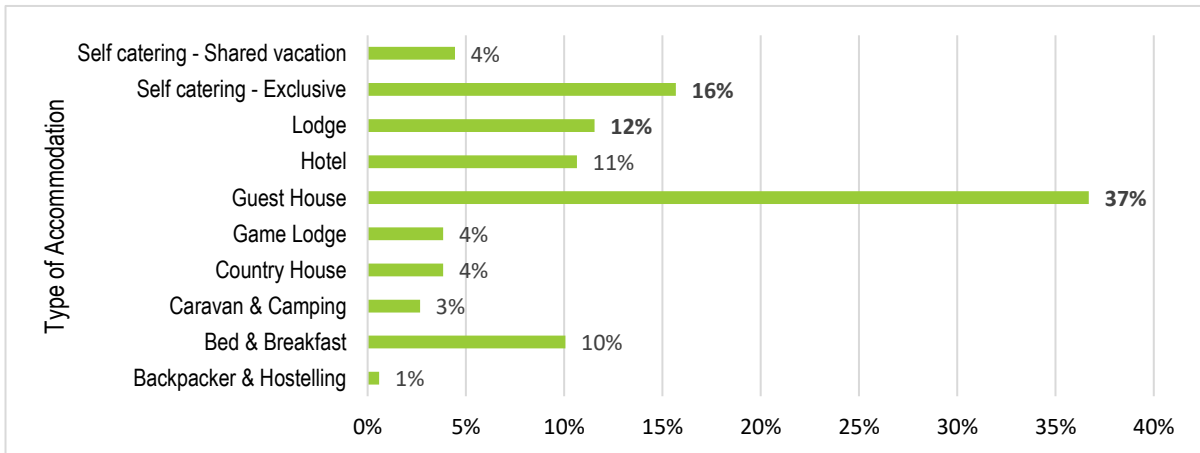
The figure above indicates the type of accommodation as well as its percentage share of the total number of graded accommodation enterprises in Mpumalanga. Guesthouses represent the largest portion of graded establishments with a total of 37%. Self-catering comes in second with 16% representation, followed by lodges, hotels and B&Bs at 12%, 11% and 10% respectively. Although all types of accommodation are graded to some extent, individual representation proves to be low for most of the businesses. Government should encourage and support accommodation establishments to grade themselves and through this enhance the standard of tourism products in the province.

3.2.3. General Tourism Accessibility

❖ Access to information

From a supply-side, research, information provision, and communication play a crucial role in the marketing, strategic decision-making and delivering of a product. The tourism demand-side requires information and communication abilities to not only inform their decision-making and trip, but also to assist with bookings, accessibility, communication, social media and safety. It is important that management understand that information is an essential building block in tourism and hospitality. One site that is valuable for potential visitors to Mpumalanga is the Mpumalanga-Info website (www.mpumalanga-info.co.za). This site provides tourists with beneficial information relating to all different aspects of their travels – accommodation, activities, restaurants, business listings, safety and security information as well as specials hosted within the different regions. Because the site is specific to the province, the information is meant to guide and prepare visitors for this destination specifically. Such information provides a helpful platform to educate and equip tourists with the relevant information.

❖ E- Tourism and Marketing

Figure 21: Mode of travel booking 2016
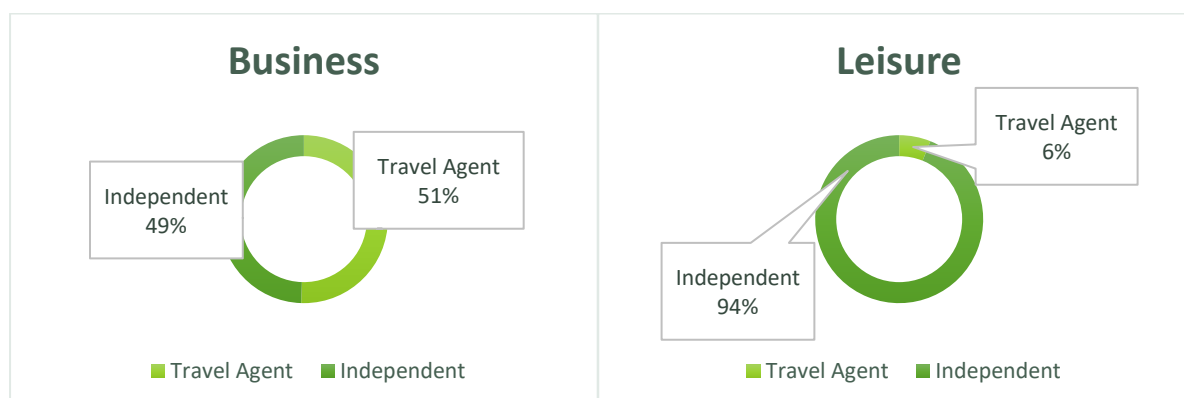
Source: Stats SA Domestic Tourism Survey 2016

More and more tourists are making use of the internet and other related technology to independently book their travels. For this reason, it is imperative that tourism managers obtain the necessary knowledge of e-commerce and use of IT to achieve a competitive advantage, especially when it comes to product development and marketing. ICTs can be applied to improve businesses not only through online marketing (expanding business) but also strategic management (operations). E-tourism, in particular, supports the interactivity between tourism enterprises and consumers and as a result they re-engineer the entire process of developing, managing and marketing tourism products and destinations. Because it plays an important role in buyers' decision-making process, e-tourism is at the centre of consumer processes for purchasing tourism products. Only those organisations that take advantage of the opportunities which ICTs bring and manage their resources successfully will be able to enhance their innovation and competitiveness in the future.

❖ Universal accessibility

Accessible tourism enables people with access requirements, including mobility, vision, hearing and cognitive impairments, to function independently and with dignity through the delivery of universally designed tourism products, services and environments. This includes all people including those travelling with children in prams, people with disabilities, and senior citizens. Tourism establishments and tourism planning approaches should be inclusive of people with disabilities. Tourism is about getting away and being able to relax and enjoy yourself; this should be the case for people with disabilities as well. To be able to get around and have ease of access will automatically contribute towards the general 'tourist experience'. It is important that destinations 'position' themselves on a global scale, highlighting the positive elements (e.g. natural, cultural and historical resources) that makes their destination unique. Those elements distinguish the tourism destination/product in the minds of consumers as having a certain character, personality and identity that promise pleasurable and memorable experiences. This forms a very important element for their branding when it comes to marketing. A destination's geographical position and its tourism assets play a key role in attracting tourists. Market segmentation is thus crucial so that the correct distribution channels can be used to reach those specific markets.

3.2.4. Transport

Transport plays a very important role in tourism as it carries passengers on the routes to and from their tourist destinations and activities. It also has an impact on the overall experience and satisfaction of tourists. In Mpumalanga, the most used mode of transport (for domestic tourists) in 2016 was cars, with a total of 10.6% of tourists. This is a 0.9% increase from the same mode of transport in 2015. Coming in at a very close second with 10.2% are taxis which also experienced a 0.6% growth. Bus travel represents 5.3% of the total transport usage in 2016, showing a decline compared to 2015. Air travel grew by a massive jump from 0.2% in 2015 to 4.7% in 2016.

Figure 22: Mpumalanga's share of domestic mode of transport 2016
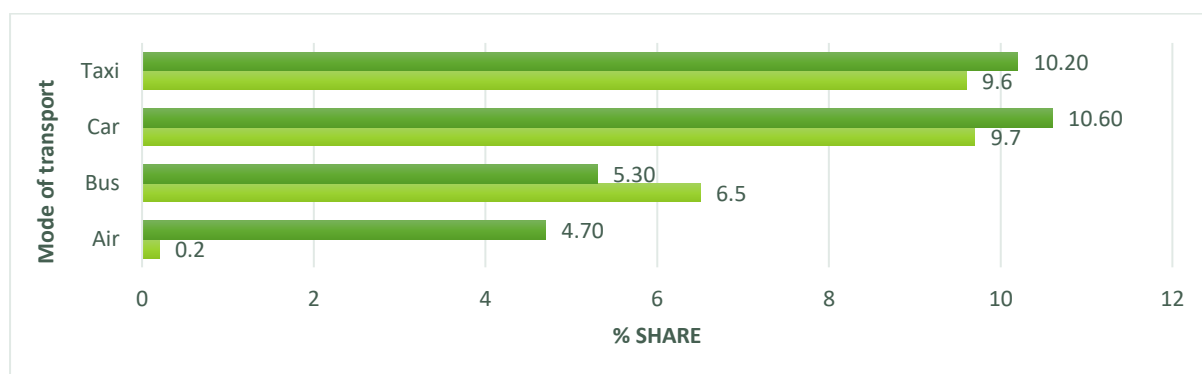
Source: SAT Annual Tourism Report 2016

It is important that the transportation system and gateways of a destination are efficient and sustainable to motivate more effective and responsible travel mode usage from tourists and residents alike. The development of transportation, transportation vehicles, infrastructure and using new technologies in the transportation sector speeds up the development of tourism.

The Kruger Mpumalanga International Airport (KMI Airport) took the lead in airport technology and became the first airport in Africa to implement virtual reality (VR) technology in September 2015. With this, technology users are transported to an immersive virtual world at the click of a button, which showcases the airport and surrounding highlights of the province. The airport also recently introduced additional flights between Mbombela to Cape Town and Mbombela to Vilanculos. Flights have been added in response to market demand and will provide travellers with increased flexibility when planning their itineraries.[11] Air charter companies offer shuttle services to a host of South Africa's premier destinations as well as offering specialised "fly-in" safaris to the Kruger National Park. From helicopters and small planes to hot air balloons, there are many exciting ways to discover the province. Many of the private game lodges and reserves have landing strips making charter flights possible.

3.3. Mpumalanga's Tourism Challenges and Opportunities

3.3.1. Challenges for Tourism

Table 7: Mpumalanga's tourism challenges relating to main pillars of NTSS

CHALLENGES	
MARKETING	
Poor packaging of products	Lack of strategy and guidance i.e. target markets/emerging markets
Lack of vision for the sector	Not keeping up with marketing trends
Insufficient funding to carry out marketing efforts	Lack of support from municipalities
No collaborative effort by industry players and Government	Lack of information offices
Limited platform to market services	
ACCESSIBILITY	
Rapidly decaying road infrastructure	Dysfunctional border posts (Mozambique & Swaziland)
Corruption by traffic officials (roadside)	High costs of airlift to and from Kruger Lowveld area
Almost no suitable public transport between towns and in towns to attractions	Lack of tourism signage in general
Lack of provision of free, reliable information, i.e. information centres web-based applications and apps.	Problems with obtaining Public Transport Permits for vehicles and drivers
TRANSFORMATION AND SMME DEVELOPMENT	
Corruption and mismanagement of funds in government	Lack of catalytic projects
Existing businesses are small and transformation possibilities limited	Uncoordinated interventions by different government agencies/departments that bear no fruit
Projects that are suspended due to lack of government support	Unreliable service delivery hampers development of any kind
BBBEE is missing the mark – only a handful of participants which are big enough to comply; it has maxed out its effectiveness	Poor participation of minority groups in forums
DESTINATION MANAGEMENT AND COORDINATION	
Lack of effective marketing, management and coordination	No benchmarking of meeting visitor expectations
Poor service delivery from municipalities	No management and coordination
Lack of heritage site management, decaying public attractions and parks	Lack of clarity on the roles and responsibilities of the different organisations

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[11] KMI Airport official website- www.kmiairport.co.za.

CHALLENGES	
Poor stakeholder relations between government and private sector	No established research units within municipalities
PRODUCT DEVELOPMENT/ VISITOR EXPERIENCE	
Lack of/mismanagement of funding	Lack of reliable statistics to encourage/attract investment
Lack of resources and expertise	Lack of tourism innovation and foresight
Land claims and uncertainty about land tenure	Lack of heritage site management and heritage research
Unresponsiveness of government	Crafter markets on the outskirts of town; tourists don't really go there
Red tape associated with creating new products	More tour guides need to be trained so that they can form part of product packaging
No initiative at key sites that are in government ownership – private sector cannot invest	Limited coordination and integration of products and experiences to be part of sensible routes
Industry "spoilt" with what we have is enough – no need to think out of the box	Poor access/signage to heritage sites – mostly too far "off the beaten track".
Lack of capability/capacity to host large international conferences	

Source: Stakeholder engagements

❖ **Decline of Domestic Tourism**

Several studies demonstrate the promotion of domestic tourism can have significant economic, socio-cultural and economic impacts and contribute to obtaining the objectives of both national and local economic development. Mpumalanga's domestic tourism suffered a 24% decline from 2015 to 2016, and for this reason considerable attention should be given to stimulate growth of the domestic tourism market. Domestic tourism is not only important because it increases the tourism market in general, but also because it contributes towards the sustainability of the industry. It is viewed that domestic tourism can be a vital catalyst for local economic development as domestic tourists "typically purchase more locally produced goods and services than other categories of tourists, thus supporting small-scale enterprises and the informal sector".[12]

❖ **Safety and security**

Tourism is generally associated with increased crime and disorder, but the pattern varies between different tourism destinations. The safety and security of visitors, residents and tourism product owners are of utmost importance. When picking a travel destination, tourists are highly cautious as they are aware of the risks they're taking when travelling to a foreign country. Being labelled as a destination that is not safe and secure will most surely affect the number of arrivals to that destination. If a visitor feels threatened or unsafe during a trip this may impact on length of stay and expenditure in a destination and decrease the likelihood of repeat visitation and word-of-mouth referrals. Tourists want to be able to enjoy the attractions and participate in activities without the fear of being victim to a crime. Mpumalanga has unfortunately been exposed to more than one safety and security breach as numerous incidents of hijackings, theft and other attacks on tourists have been reported. This is not good for the province's reputation. The lack of safety and security also influences the business environment as well as the confidence of

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[12] Scheyvens (2007: 312)

product owners. Safety and security issues relate to public transport, strikes, demonstrations and crowds, car-related theft, pickpocketing/theft from person and robberies.

'We are concerned about these attacks as they impact negatively on tourism in the province'

- Mr. J. Nobunga (CEO of MTPA 2017)

In developing tourism as part of the strategy for sustainable development, safety and security improvements should include[13]:

Better touristic information: The authorities should be involved in opening some tourist information centres/offices and in the creation of a touristic orientation system to facilitate tourists' access to different touristic objectives or institutions. This would include better use of the internet.

Better safety advice: Tourists' awareness of the various risks should be raised, including information and recommendations concerning units of accommodation and catering, sanitary units, cab companies, means of transport, routes, etc. As the different local constituencies appreciated, however, this latter point is hostile to fortune. Too great an emphasis on security information can induce a sense of fear among tourists.

Better guidelines for stakeholders: Thus, the emphasis also needs to focus on safety advice for stakeholders. A document of good practice was therefore seen as an invaluable aid to creating, at the local level, a safe and high quality touristic environment, one in which tourists could coexist with residents.

❖ **Condition of Roads**

Mpumalanga has received backlash in the media relating to the poor condition and lack of maintenance of main tourism routes. Headlines such as "Potholed Mpumalanga is driving away tourists' (Business Live 2018), is negatively impacting tourists' decisions to visit the province and can lead to even bigger problems for the economy going forward. The roads have become increasingly dangerous and feedback from unsatisfied tourists only emphasises the dire need for action. It is imperative that these tourism routes be upgraded and maintained to improve access to the province and in-between tourist attractions.

Table 8: Key Tourism Routes in Mpumalanga that need urgent attention

R540	Belfast-Dullstroom-Lydenburg (Mashishing)
R36	Bambi turnoff (N4) to Lydenburg (Mashishing)
	Lydenburg (Mashishing) to Ohrigstad
R536	Sabie to Hazyview
	Hazyview to KNP Gate
R525	Hazyview to Graskop

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[13] Mawby et al. (2016:524)

R532	Sabie to Graskop
	Graskop to Echo Caves
R534	Road to God's Window
R533	Ohrigstad-Pilgrims Rest- Graskop
R537	Sabie to White River

Source: Kruger Lowveld Chamber of Business & Tourism

Although maintenance on the roads is taking place, there is a considerable backlog. Discussions between DEDT, MTPA, PWRT and other stakeholders are proceeding, where generating the necessary funding to rehabilitate these roads is a top priority. The department of Public Works, Roads and Transport has compiled a cost requirement in order to accommodate only these major routes (see Table below).

Table 9:Mpumalanga Provincial Tourism Routes Proposed Treatment (2017/2018)

Type of Treatment	Length (km)	Cost (R, Million)
Re-gravel	36	25.263
Ungraded to paved	3	113.46
Light Rehab	252	1551.161
Reseal	264	502
Heavy Rehab	199	2596.205
Total	754	4787.648

Source: Department of Public Works, Roads and Transport

❖ **Lack of community involvement/participation**

Participation in this sense can be defined as 'a programme that involves sharing decision-making process in the implementation of programmes and evaluating of programmes associated with development and benefits'.[14] Communities play a very important role when it comes to tourism as they form part of the tourism 'product'. Communities form part of the hosts in a destination and therefore have an impact on the development and delivery of a tourism product. When communities are not included/not participants in tourism practices they may develop a mindset and attitude of alienation and through this deter from supporting such initiatives. The lack of participation is partly due to the lack of awareness and lack of knowledge of tourism information. If effectively addressed and implemented, community participation positively influences social development, supports local integration and contributes to transformation progress. In addition, the involvement of local communities not only enhances socio-economic development, but also establishes a responsibility within them to protect the industry and all its aspects.

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[14] Meyer & Theron (2000:1)

3.3.2. Opportunities for tourism

Table 10: Mpumalanga's tourism opportunities relating to main pillars of NTSS

OPPORTUNITIES	
MARKETING	
Enhance experiences to iconic attractions KNP, Panorama Route, Geo-trail (World Heritage Site)	Broader options in terms of packaging the province
Participate in joint marketing – one vision	Develop an Events & Festival Strategy
ACCESSIBILITY	
Network of buses for 'hop on hop off' sightseeing	Railway resuscitation connecting nodes in Kruger Lowveld area with a straight line from OR Tambo Airport to Mbombela
DESTINATION MANAGEMENT AND COORDINATION	
Route and sub-region development, e.g. Liberation Route	Availability of industry experts and experienced industry leaders to advise on strategy, plus the support of well-organised and established RTOs, LTOs and Chambers
Incredible untapped potential, natural resources, heritage, art, etc.	
TRANSFORMATION AND SMME DEVELOPMENT	
Make proper proposals about ideas to stop investment in poorly thought out projects	Expand the industry for successful transformation
Create an understanding of how a sub-region or route needs to be established to be successful	Develop catalytic projects that provide opportunities to many
PRODUCT DEVELOPMENT/ VISITOR EXPERIENCE	
Creation and packaging of township and rural tourism	Concessions to be granted by government for private sector to take over sites
Developing special interest tourism routes, i.e. birding, art, struggle history, Jock, etc.	Panorama Pass (for example), provide easier navigation and payment to access attractions – better revenue control to pay for necessary upgrades

Source: Stakeholder engagements

❖ **Expand domestic tourist market**

More attention should be given to stimulating the growth of the domestic tourism market. Product development and packaging should be revised to be more appealing and affordable and must cater to this market specifically. New product lines and new suppliers should be integrated to make it accessible to more consumers and to further increase leisure and recreational opportunities for the domestic market. High occupancy levels on the domestic front could reduce the fluctuating levels of seasonality. Tourism promotion should increase tourism awareness among residents and seek to enhance the reputation and standing of domestic holidays.

❖ **Transformation and development of SMMEs**

Transforming the sector means providing economic growth opportunities to the youth, women and other previously disadvantaged groups and equipping them with the right tools and skills to make the best of those opportunities.

Table 11: Support programmes currently available to empower women and the youth

Programme	By
Executive Development Programme-Woman managers in tourism	NDT

Youth chef, hospitality and wine programmes, learnerships, internships	NDT
Social Responsibility Implementation Programme- Developing CBT	NDT
Youth Pipeline Development Programme	IDC
Grow-E Youth Scheme	IDC
National Youth Development Agency Grant Programme	NYDA

Training and skills development initiatives focus on business counselling, training, planning, building and mentorship. It is important to note that stronger awareness should be created for all the youth-related programmes through promotion and marketing campaigns. In many cases, entrepreneurs are unaware of all these opportunities as the information is not reaching them. Funding channels are available through SEDA, IDC, NEF and SEFA to mention a few. Various government and other organisations are providing the support and mentorship needed to guide new and aspiring entrepreneurs to build their businesses.

Table 12: Support programmes currently available to assist entrepreneurs who want to start their own SMMEs

Programme	By
SMME Development, Tourism Skills Training and Awareness	MTPA
Enterprise Development Programme, CPPP Programme, Incubation Programme	SEDA
Tourism Incubation Programme	NDT
TIP (grading, accessibility, green tourism, transformation support)	NDT
Tourism Incentive Programme – small business	NDT
International Market Access Support Programme	NDT
Tourism Grading Support Programme	NDT

❖ **Packaging and promotion of heritage and cultural products**

This form of tourism provides an opportunity for cultural exchange, learning, and mutual understanding between visitors and local community members. Heritage tourism focuses on both tangible and intangible elements of culture. Intangible elements refer to the non-material aspect of heritage and culture such as language, religious practices, music, oral histories/narratives that are 'important to people in helping to establish their identity and sense of community in the world'.[15] It also includes memory, people's sense of attachment and emotional engagement to a place. The heritage and cultural component is important for tourism in the region because:

- It is an important means for educating tourists and promoting a better understanding of local culture and cultural resources as well as encouraging interaction between tourists and locals.

- The demand has already been established and confirmed for cultural and heritage products and therefore it is an asset for tourism since it has influence on the province's economic development.

- It is of great importance on a socio-economic level; local communities benefit economically and develop a stronger connection to their heritage.

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[15] Harrison & Rose (2010:238)

- It strengthens the marketing image and 'brand' potential of the area as a historical and cultural heritage destination

Cultural and heritage tourism has also taken centre stage as an inexpensive mechanism to attract tourism development[16], and it is also considered a very reliable source of income.

❖ **Participation of local communities**

Tourism has been identified as a tool to enhance the livelihood of local people, and therefore the involvement of local communities in tourism initiatives is strongly advocated by scholars in the field. The overall success rate is much more positive once communities are involved with and benefitting from tourism in the area. The support of the locals is paramount in order to identify, implement and manage any form of tourism in the area. It is essential to find out how the residents are already using the area and how they wish to use it in the future.

Tourism not only affords an income to community members but also introduces skills development through various training programmes. In this sense, tourism provides economically towards the province and the locals; it contributes to individual personal growth and social cohesion and community pride. Actions in this regard should thus move towards proactive, inclusive and locally-based initiatives to tackle the roots causes of socio-economic problems experienced by communities in deprived areas.

❖ **Development of tourism routes**

'Tourist routes' or 'tourism routes' can be defined as linking together a series of tourism attractions in order to promote local tourism by encouraging visitors to travel from one location to another. Tourism routes provide the perfect opportunity to display those aspects that make a destination unique (e.g. historic and cultural elements) but also to increase the spread of benefits to more than one product owner. The ideal is to create routes that directly contribute to the alleviation of poverty in especially rural and marginalised areas while celebrating and fostering African culture and promoting nature conservation. This unique cultural offer provided by destinations has become a major driver and motivation for tourists worldwide. As mentioned before, local community participation is important in tourism product development, and these routes offer opportunities for participation as well as local community development.

Current routes in Mpumalanga, for example the Panorama Route, bear testimony of the strong pull factor that these tourism routes can be in attracting tourists to the destination. Stakeholders have also highlighted the development of more tourism routes as a catalyst to attract more tourists. The potential for more tourism routes exist where routes can be 'packaged' to cater to specific niche markets, highlight the best tourism offerings in each district or combine the major tourist attractions within the whole province. Other advantages include opportunities for the formation of local development partnerships as well as support to other industries. For example, the physical nature of these routes brings forth the need to turn to a variety of means of transport. An itinerary may involve

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[16] Kavita, E. *et al* (2017:4)

travelling by train, plane, bike, on foot, by boat and car as alternatives or as a single solution, depending on the individual decisions of the visitor. One of the most important considerations is to spread the economic benefits more widely by developing tourist facilities, activities and services along tour routes in a manner that will facilitate tourist spending at these stopover points to provide additional employment and income, both directly and indirectly[17].

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[17] Meyer (2004)

Section 4: Policy and Strategic Overview

This section provides a summary of all the relevant and appropriate national, provincial, district, and local economic development and tourism-related legislation, policies and strategies of the Mpumalanga Province. These policies guide responsible and sustainable tourism objectives that aim to not only expand the tourism sector, but also to ensure economic growth and a better quality of life for those who form part of it. It is imperative that tourism-focused strategies align with these policies so that the objectives can be carried out successfully.

4.1. National Regulatory Framework for Tourism Development

There are several national policies that have an effect on tourism development. Each policy has a view on the economic growth role of tourism as a sector and makes its own provision for the development of tourism as well as the promotion of tourism. The national policies consider international changes. The consideration of these policies provides the tourism sector with the ability to change along with the international changes.

4.1.1 Tourism White Paper 1996 and the Tourism Act no. 3 of 2014:

The Tourism White Paper identified tourism as a clear economic growth role. The main purpose of this policy is to identify the guiding principles for tourism. The policy states that tourism development will support the economic, social and environmental goals and policies of the government. The policy identifies the guiding principles for tourism as follows:

- Tourism will be underpinned by sustainable environmental practices.
- Tourism is dependent on the establishment of cooperation and close partnerships among key stakeholders.
- Effective community involvement will form the basis of tourism growth.
- Tourism will be private sector driven.

The Tourism Act (no. 3 of 2014) makes provision for the development and promotion of sustainable tourism for the social, economic and environmental benefit of South African citizens.

The Act highlights objectives such as:

- Promotion of responsible tourism practices
- Promotion of quality tourism products and services
- Promotion of economic growth and development of the sector
- Establishment of concrete intergovernmental relations to develop and manage tourism

The Act focuses on grading systems and tourism protection and on aspects like the designation of tourism complaints officers and the duties of the tourism complaints officers.

4.1.2. National Tourism Sector Strategy (NTSS) 2016-2026:

The main purpose of the NTSS is to position South Africa as an internationally competitive tourism destination. The continuous change of the domestic and international environment led to a new vision for the NTSS in terms of a rapidly growing tourism economy that leverages South Africa's competitive advantages in nature, culture and heritage, which led the NTSS focus on the following:

- Inclusive growth which is fundamentally based on increasing expenditures of tourist
- Harnessing the strengths of the public and private sector to ensure alignment and the responsible use of resources
- Linking marketing plans to broader development requirements
- Building a transformed and inclusive tourism economy

The strategy also highlights effective marketing, visitor experience, facilitating ease of access and destination management which plays a significant role in the new vision of the NTSS.

4.1.3. National Development Plan (NDP)

The policy highlights a vision for South Africa for 2030 and outlines the set-up for improvement on all spectrums including tourism. The focus of this policy is predominantly on the services to stimulate areas where there is potential for competitive advantage. The policy also highlights the NDP efforts to encourage tourism to participate in rural areas to stimulate economic growth while packaging and marketing of regional tourism destinations together with the bigger South African destinations.

The NDP suggests the following in the effort to boost tourism:

- Increase airline competition would help lower costs of travel
- Increase the number of tourist entering the country as well as increasing the average amount spent during their visit
- Ease of doing business and the availability of infrastructure will attract diverse types of tourist
- Foreign business tourist arriving by air generates significant multipliers

4.1.4. South African Tourism (SAT) 5 in 5 Tourism Growth Strategy

This policy is committed to contributing to the government's objectives of increased GDP growth, sustainable job creation and transformation through:

- Increasing the number of tourists who visit the country
- Increasing the geographic spread, length of stay and spend of all visitors
- Improving seasonal arrival patterns

It is safe to say that the policy highlights extensive tourism growth in regions by obtaining an increase rate in tourism activities participated through tourist. One of the main purposes is to market tourism through the development of effective partnerships and the utilisation of resources.

4.1.5. Domestic Tourism Growth Strategy 2012-2020

This strategy is aimed at accelerating programmes and projects that will benefit local communities; prioritise campaigns that target both the lower and higher end of the domestic market; create a holiday culture among previously disadvantaged groups; extend visits to friends and relatives into tourism leisure and market domestic leisure to all major local markets. The vision and mission of this strategy is to:

- Increase domestic tourism expenditure (revenue)
- Increase domestic tourism volume
- Enhance measures and efforts aimed at addressing seasonality and equitable geographical spread
- Enhance the level of the culture of tourism/travel among South Africans

4.2. Provincial and Regional Policies and Strategies for Tourism Development

4.2.1. Mpumalanga Vision 2030

Tourism in Mpumalanga is seen as one of the main sectors contributing towards economic growth. Investment into the tourism sector will be channelled to the development of the sector, prioritising the five-key tourism functional areas in the province. The development is hindered by underdevelopment or deteriorating of key inputs such as infrastructure. The strategy will focus on developing key linkage sectors or developments directly linked to the tourism sector.

4.2.2 Mpumalanga Economic Growth and Development Path (MEGDP)

The provincial plan takes into consideration provincial specific advantages as well as disadvantages and most importantly where to improve them. The MEGDP holds the key to obtaining strategic objectives that were missionised. The policy identified interventions that can improve the state of tourism in the province. Such interventions include infrastructure development, skills development, cooperatives development, implementation of tourism awareness education programmes as well as differentiated marketing. The tourism strategy will focus on indirectly or directly impacting on the interventions highlighted on the MEGDP.

4.2.3. Development of Tourism Policy Framework: Mpumalanga Annual Performance Plan

The policy focuses on tourism as a sector that requires development. According to the policy, tourism is one of the major growth points in Mpumalanga. The policy also focuses on tourism historical imperatives, stating that tourism is highly fragmented and that there is a growing divide between what the public sector does as part of the efforts to grow the economy through tourism versus the strategic direction that the private sector is taking. The policy

identified certain tourism key areas that need development, e.g. Pilgrim's Rest theme park, Waterval Boven heritage and tourism development plan and the strategic Blyde River Canyon tourism projects.

4.2.4. Mpumalanga SMME and Second Economy Support Strategy 2009

To establish Mpumalanga as a province that attempts to alleviate poverty and create more job opportunities in the tourism sector, it is important to bridge the gap that exists between the first and second economy and provide the necessary support to the SMMEs in the province. For this reason, the development of an SMME and Second Economy Support Strategy was commissioned.

The Strategy is based on addressing the key challenges that are faced by the upcoming SMMEs and how the MTPA can assist or facilitate the solutions to the challenges with key partners. The challenges are viewed from different perspectives in regard to the size (small, medium or large) as well as the stage (new entrants established or well established) of the businesses. The frameworks that have been developed to address the challenges include the following:

- SMME product development programme
- Skills development programme
- Financial development programme
- 'New entrants' business programme
- Transformation programme
- 'Formalize your tourism business' programme
- Information and communication management programme
- SMME product packaging and channel access programme
- SMME marketing programme

4.2.5. Mpumalanga Tourism Research and Information Management Strategy 2009

The primary scope of this project was the development of a strategy for tourism-related research and information management for the province of Mpumalanga that would feed into the Tourism Growth and Development Strategy. The report presents feasible strategies to plan for more effective research and information management to meet the aims and objectives set out by the MTPA.

Broadly speaking, the primary purposes for the development of this report were:

- Provide the tools to assist the province in developing an efficient information system
- Provide a comprehensive and integrated strategy to direct tourism research practices
- Provide a comprehensive and integrated strategy to direct tourism information practices

4.2.6. Mpumalanga Tourism Investment Promotion Strategy

Increasing tourist arrivals has presented various challenges whereby tourism product owners must improve the quality of their products and increase the variety of offerings in order to accommodate and encourage higher volumes of visitors.

The desired outcomes for this strategy include:

- The promotion of investment opportunities in the tourism sector
- Identification of home countries of potential investors
- Reflect the overall competitive advantage of the tourism sector to attract investors
- Create job opportunities
- Participation of SMMEs in tourism projects.

4.2.7. Ehlanzeni District LED Strategy

Tourism for the district is a major contributor to the economic growth and to the diversification of the local economy, reducing levels of poverty and increasing opportunities for businesses in the second economy. The key tourism aspects that make the district a tourism destination are scenic beauty, proximity to wildlife game reserves, climate as well as events and activities. The strategy should prioritise preserving the wildlife as well as keeping the tourism driven activities.

4.2.8. Gert Sibande District LED Strategy

The policy shows signs that Mpumalanga as a province can contribute to the economy through tourism as well as gain from it. There are certain factors that makes the policy difficult to implement, such as the fact that it requires excessive amounts of investment and capital to develop tourism to the desired standard. The strategy should prioritise securing investments and properly allocate it into priority projects directly linked to the sector.

4.2.9. Ehlanzeni Rural Development Plan

Rural villages around the key tourist attractions require proper service delivery in order to create a calm environment for tourists while dealing with the issues of strikes. Community involvement in the development of the sector is also important. The municipality involvement is key. The strategy should therefore focus on integrating various government stakeholders into the development of the sector to work together.

4.2.10. Nkangala Rural Development Strategy

The tourism sector in the district is hindered by the decaying infrastructure and underdevelopment of the rural areas. This strategy also highlights the importance of infrastructure development and rural area development in the district.

4.3. Policy Alignment Diagram

There are many objectives that overlap between the national and provincial policies relating to job creation, growing the economy, tourism marketing and transforming the sector. For this reason, they are all linked to one another in some way or another. The diagram illustrates that the tourism strategy is developed in alignment with not only the NTSS and NDP, but also other important policies and strategies pertaining specifically to Mpumalanga.

Figure 23: Alignment of national and provincial policies to guide and inform the tourism strategy
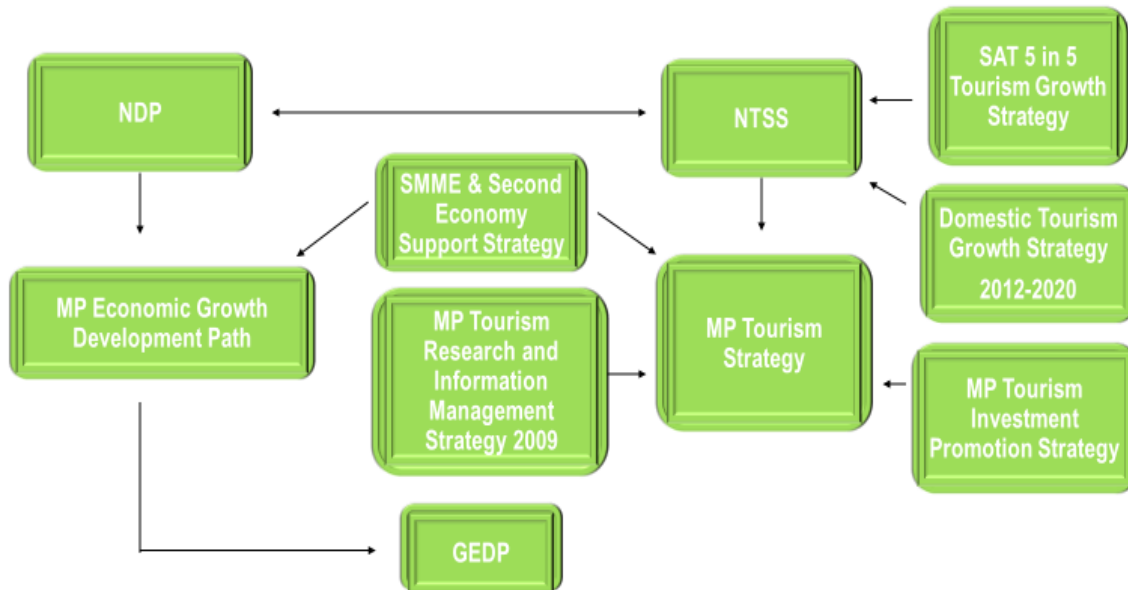
In general, policies and strategies are well represented on the provincial level. It covers elements ranging from communities to the environment, to development. Regulations on a district level reveal that each district is incorporating local economic and integrated development plans as well as rural development strategies. Providing that policy alignment is in place and government spheres and the private sector collaborate in developing and enhancing the tourism sector, Mpumalanga's competitiveness as a tourism destination can only go from strength to strength. Working together to achieve the outcomes as specified in the strategy will safeguard benefits for all.

Section 5: Appraisal of Previous Tourism Strategy

The previous strategy, the Mpumalanga Tourism Growth Strategy (MTGS), was published in November 2007 and was developed on a 10-year implementation period. The strategy addressed, amongst other, the lack of tourism offerings, the loss of competitiveness and the potential for developing and expanding the tourism sector. Other focus areas identified in the strategy to enable tourism growth were the following:

Focus Areas: Geographical	Focus Areas: Other
Blyde River Canyon and other reserves managed by MTPA	Better regulation of licences, tourism grading and safety and security
White River area	FIFA World Cup Soccer 2010
Barberton	Improved air access
Sabie/Hazyview	Reorganising institutional relationships
Pilgrim's Rest	Creating more job opportunities
Dullstroom	Promotional campaigns by MTPA
Wakkerstroom	Economic empowerment of historically disadvantaged communities
Chrissiesmeer	Improve product standards
Loskop area	Formal certified training systems
The Mpumalanga Route	Sustainable benefits

Source: Mpumalanga Tourism Growth Strategy 2007

Specific flagship projects that were identified:

- Development of a world class amusement park in Witbank area
- Biopark development at Barberton
- Development of an international convention centre, Mpumalanga ICC in Mbombela
- Ndebele Arts and Design Centre
- Further development of sport, shopping and medical tourism in Mbombela
- Loskop area Tourism Centre
- Hotel and villa development (golfing and spas/wellness) at Pilgrim's Rest, White River, Hazyview, Barberton, Sabie
- Luxury steam train from Sabie, Mbombela, Barberton to Malelane and Maputo
- Budget accommodation development at Mbombela
- Development of industrial museums
- Casinos and other forms of entertainment
- Blyde River Cable Car and Visitor Heritage Centre

Source: Mpumalanga Tourism Growth Strategy 2007

Although the development of some flagship projects progressed and were implemented to an extent, many project items experienced limited development throughout the strategy's running period, these include the development of the Barberton BioPark, increased investment to Sabie and Hazyview with residential tourism and a 5* Golf Resort Complex, hunting and angling centre in Dullstroom, visitor security as a top priority and increased investor interest in sport tourism.

Projects that were not developed include: enhancing Pilgrim's Rest National Monument status with a world class living museum, the amusement park neat Witbank, the development of the Ndebele Arts & Design Centre in the Nkangala District and increased investment in tourism and leisure facilities.

This strategy also outlined matters that were not addressed due to time, budget and other constraints (see below). Apart from the development of the nature and game reserve management, which the MTPA addressed, the other elements have been factored into the new tourism strategy.

Not addressed in previous Growth Strategy

Better access to transport

Development of the nature and game reserves management (The MTPA formulated an investment strategy for the parks and reserves under its control)

The business climate for enterprise development

Community involvement

Transformation of the sector
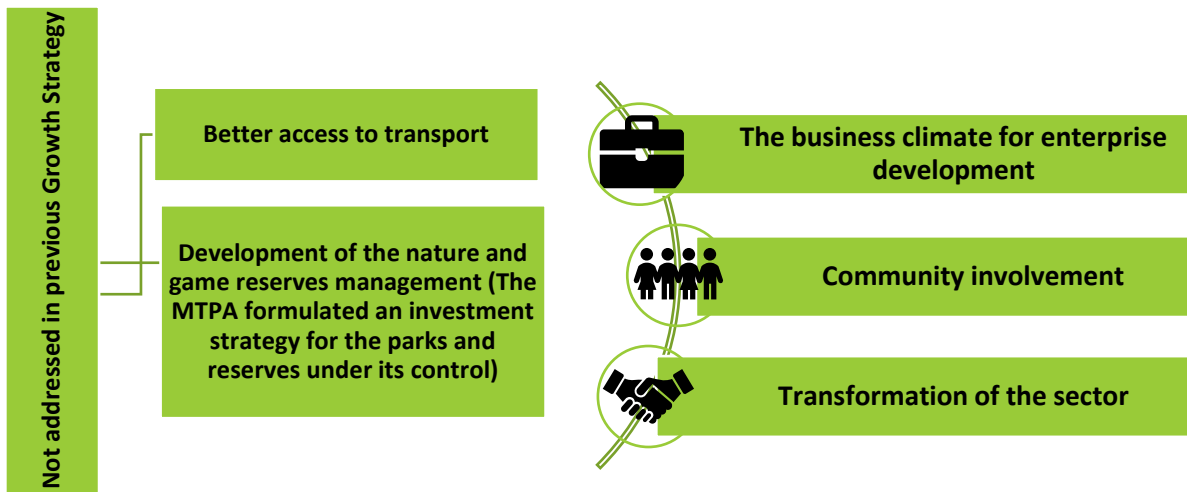
Although not all the flagship projects were addressed, and some only partially, the province still has the potential to translate its resource base into a more competitive tourism sector. Projects from this strategy that have been identified as projects with the potential to still be developed, and which was added to the new strategy implementation plan, is the Mpumalanga ICC in Mbombela and the Ndebele Arts and Design Centre

Section 6: Strategic Framework

The strategic objectives of the tourism strategy have been adapted from the previous Mpumalanga Growth Strategy 2007.

| Develop tourism sector as driver of economic activity | Product expansion & diversification | Implement responsible & sustainable tourism practices | Enhance general competitiveness of proivnce | Structure effective institutional relationships | Grow domestic tourism for a sustainable economy |

STRATEGY OBJECTIVES

The objectives are in line with national tourism objectives as well as those indicated in other provincial and local tourism policies. The main aim is to attract more visitors to the province and this can be done through more vigorous and innovate marketing, expanding on product offerings and ensuring a safe and enjoyable experience to tourists. Throughout the development and implementation of these strategies, it is imperative to promote and exercise sustainable and responsible tourism practices to ensure long-term sector and economic growth within the province.

In the process of working towards achieving these tourism objectives, there are important factors that influence the processes. One of them relates to the key elements that motivate the will and drive to achieve positive outcomes. For this strategy, the key drivers include:

Market Expansion

Product Development

Destination Competitiveness

Responsible & Sustainable Tourism

Transformation

Economic Growth

These drivers sustain progress and allow the industry to keep its eye on the prize. Both the public and private sectors benefit from these drivers as a continuously increasing tourist flow means economic growth, sustainable income and benefits to those who operate in the tourism sector.

The strategy has been designed in alignment with the main NTSS Pillars, with slight amendments made to suit the specific needs for tourism in Mpumalanga.

6.1. Vision Formulation

The vision statement is the anchor point of any strategic plan. It needs to be specific to the province and its tourism sector and should describe a unique approach that should be implemented to position tourism as one of the key drivers of the economy. The vision should also align to the values that the province upholds as a tourism destination and what it hopes to

Products:
- ❖ Cultural and Heritage Experience
- ❖ Wilderness/Wildlife Experience
- ❖ Adventure Experience
- ❖ Conferencing & Entertainment

Mechanism:
- ✓ Economic Growth
- ✓ Improve infrastructure
- ✓ Improve living conditions,
- ✓ Improve employment
- ✓ SMME development and support.

Market:
International, Domestic, Emerging

Source: Urban-Econ

be and achieve in the long term. The vision statement provides a concrete way for stakeholders, especially employees, to understand the meaning and purpose of the current, and future role of tourism, as well as its impact on the province's economic growth and on the wellbeing of the people It is important that the vision provides guidance and clarity, inform direction and set priorities while challenging the sector to grow.

To develop the vision, attention should be given to the tourism products that the province has to offer, the mechanisms that will be put in motion through tourism and also the specific markets that are targeted. The vision should also align with the specific tourism objectives that the province wants to achieve. In Mpumalanga, the tourist markets are international (American and European), domestic and emerging (Asian). The drawcards of the

province include the natural/scenic beauty (wilderness & wildlife), the heritage and cultural offerings as well as the diverse adventure experiences. The objectives, that strongly support economic growth, best practice and transformation within the sector, are also reflected in the vision statement. In merging all these important aspects to represent and guide the tourism strategy, the vision statement for the Mpumalanga Tourism Development Strategy is:

To encourage and support inclusive growth that will sustain and transform the tourism sector, enhance the livelihood of the people and strengthen the competitiveness of the province to become a preferred destination of choice

6.2. Marketing and Promotion

With advances in technology and new ICT systems being implemented to coordinate tourism-related process, destination management should adopt to these changes and implement the latest technologies, especially in marketing. Attracting tourists depends solely on the capability of the destination to broadly market itself to the rest of the world by making use of distribution channels that will produce the best results for that specific product. One of the most important reasons for the growing importance of marketing communication is that it plays a key role in the process of developing and sustaining a consistent image in the market.[18] Marketing management should therefore keep adopting new and innovative ways in which the destination can be presented and packaged to the rest of the world.

Pillar: Marketing and Promotion		
Objectives	**Action**	**Expected Outcome**
International Market	• Sustain current int. markets - European & American markets • Focus on new/emerging markets - Asian markets	• Reaching target audience • Stronger representation • Niche marketing • Greater efficiency in in product supply
Domestic Market	• Package affordable offerings for this market- value for money products, family & recreation • Target off-peak and mid-week travels- package 'specials'	• Increased domestic arrivals • Reduced seasonality impacts • Nation building and increased pride among residents/locals • Spreading benefits throughout the tourism value chain and its linked sectors
Brand Management	• Make use of more innovative distribution channels- promotional videos, host competitions/challenges, create discussion platforms	• Whole province to back one 'brand' • Attract more tourists • Build relationship with markets • Information provided relating to frequently asked questions about the province

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[18] Lisita et al. (2015:29)

Events Strategy	• Develop & host more festivals, sporting events and adventure events	• Additional destination pull-factors • Seasonal contributions • More niche markets
MICE Market	• Collaboration of Convention Bureau and private sector	• More business travellers • Seasonal contributions

6.3. Destination Accessibility

Accessibility to a destination manifests in various forms. Information access relates to potential visitors being able to get information of the destination when doing research or planning/booking a trip. This is usually linked to the different distribution channels used by a destination to market itself. Ease of access also relates to how easy is it to reach the destination (transport/roads) and, when at the destination- how easy is it to navigate your way to and from attractions and activities (gateways, infrastructure). This is especially the case for people with disabilities and the elderly (seniors with access needs). Destinations should cater for these people (i.e. lifts, ramps, handrails) so that they can comfortably get around and have an enjoyable experience. The tourism sector must plan to address accessibility requirements sooner rather than later. What is needed is a much more detailed understanding of the consumer needs. Challenges for persons with disabilities include[19]:

- Untrained professional staff capable of informing and advising about accessibility issues
- Inaccessible booking services and related websites
- Lack of accessible airports and transfer facilities and services
- Unavailability of adapted and accessible hotel rooms, restaurants, shops, toilets and public places
- Inaccessible streets and transport services
- Unavailable information on accessible facilities, services, equipment rentals and tourist attractions

Pillar: Destination Accessibility		
Objectives	**Action**	**Expected Outcome**
Universal Access	• Accommodate people with disabilities in destination planning approaches-ablution, walkways, parking, etc.	• Stronger motivation to visit destination • No accessibility limitations
Signage **Roads** **Air** **ICT** **Rail**	• Put up more signage along major tourism routes/hubs	• Easy access to destinations • Easy access to relevant information • Easy navigation at destination • Latest specials and offerings available to tourists
Tourist Transport	• Provide public transport between attractions and activities	• More commuting between attractions, more visits at various sites

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[19] United Nations Official Website

6.4. Visitor Experience

Visitor experience plays a very important role. It is affected by the destination attributes, the quality of the products and services, the variety and scope of attractions and activities and impacts the general repeat visitation rates. The destination should aim to meet the tourist's expectations and they should leave with their individual needs met.

Pillar: Visitor Experience		
Objectives	**Action**	**Expected Outcome**
Upgrading and maintenance public tourist facilities	• Enhance attractiveness of destination	• More tourists • Sustainable tourism
Safety and security	• Increase tourist security • Tourism Police Units at tourism 'hubs' • CCTV cameras • Effective street lighting	• Public safety of tourists
Information provision	• Provide more information centres that are interactive and interpretive	• Information integration and distribution • Quick access to relevant information
Tourism skills and service excellence	• Provide continuous 'in-house' training at tourism establishments	• Increased growth in skilled labour • Transformation of sector • Ensure quality of products and services
Eco-tourism	• Incorporate interactive communication/participation with local communities on eco-projects	• Building a positive and sustainable tourism sector • Educating the public on best practice

6.5. Product Innovation

It is the products that ultimately lure tourists to a destination, and for this reason they should be refreshed often, keep up with the times and be innovative in marketing and development approaches. Access to these products, general infrastructure and continuous evaluation will keep it relevant and interesting.

Pillar: Product Innovation		
Objectives	**Action**	**Expected Outcome**
New Product Development	• Create niche products based on strengths of local assets	• Attracting more tourists • Expanding tourism offerings
Responsible & Sustainable Tourism	• Make sure products harmonise with environment • Emphasise conservation of assets and educate the importance thereof	• Long-term economic growth • Provide attractive location for tourists • Stronger appeal to investors
Tourism/Cultural Route	• Develop routes within each district to highlight its offerings	• Access to and between tourism products • Strengthen local partnerships
Township Tourism	• Promote arts and craft stalls • Encourage community participation	• Draw tourists to marginalised areas • Community participation • Economic benefits to locals
Guided Tours	• Provide training to tourist guides as they form part of product packaging	• Quality tours • Informative & enjoyable experience for tourist

		• Stronger representation of the culture of the province
Business Tourism	• Host more business events to build the MICE sector	• Exposure to what the province has to offer might encourage tourists to come back for longer stays

6.6. Destination Management

Successfully maintaining a tourism destination requires a lot of work, information integration and strong human resource development. Accommodation establishments, for example, should aspire to be graded in order to raise and also maintain accommodation standards in the industry. Marketing, accessibility, infrastructure development and maintenance, and providing training and skills development to the workforce all contribute to the success and sustainability of a tourism destination.

Pillar: Destination Management		
Objectives	**Action**	**Expected Outcome**
Tourism marketing and developments	• Coordinate marketing and development initiatives between: government departments, between public and private sector	• Strengthening destination competitiveness • Enhance comparative advantage
Training and skills development	• Host workshops and roadshows • Advertise and promote opportunities	• Strengthen workforce • Increase productivity • Sustainable development of the tourism and hospitality sector
Best practice approaches and risk management tools	• Implement support systems, risk management and business rescue programmes	• Higher standards in industry • Higher occupancy rates
Grading of establishments	• Develop support programmes to guide product owners in the grading process	• Maintain high standards of quality products and services

6.7. Transformation and Development of SMMEs

For the sector to be transformed, the youth, women and previously disadvantaged should be granted the opportunity to operate their own businesses and be equipped to further develop and manage their businesses successfully. People should be informed on and be aware of tourism development in the area so that they can also get involved and participate in tourism. However, one of the greatest obstacles to visible transformation and restructuring of the SMME is the unfamiliar and irritatingly long and complex series of procedures and actions confronting financial aid seekers.[20] There are various support structures in place to facilitate access to business opportunities and to assist these aspiring entrepreneurs in their business ventures. Assistance with marketing is a

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[20] Monakhisi, N.P (2008:163)

key component to these programmes to help SMMEs with finding suitable markets and to create competitive advantages that will ensure the long-term survival of SMMEs.

Pillar: Transformation and Development of SMMEs		
Objectives	**Action**	**Expected Outcome**
Black Economic Empowerment (B-BBEE) targets	• Create stronger awareness • Encourage target reaching	• Inclusion of youth, women & previously disadvantaged • Inclusive distribution of benefits
Enterprise Development	• Provide training for SMME development • Funding support • Host workshops & exhibitions to create awareness	• Improve transformation status • Continuous guidance & mentorship • Economic growth
Rural areas	• Bring visitors to local crafters and artists.	• Attract more visitors to these areas
Community participation	• Initiate Participation programmes	• Inclusive participation • Stronger support and understanding from communities

Section 7: Institutional Arrangement and Implementation

7.1. Institutional Constraints

Most of these recognised barriers that hinder progress and growth within the sector can be changed to deliver a different outcome for the province in terms of tourism. To mention a few in terms of the institutional relationships
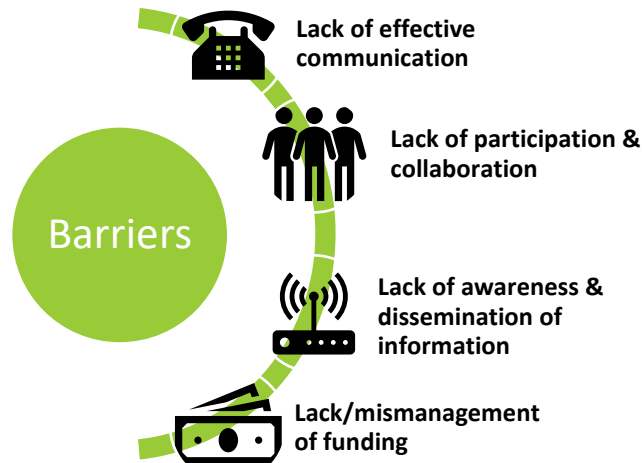
and it general functioning- the lack of effective communication between the public and private sector causes frustration and results in misunderstandings and feelings of alienation or disregard. This affects business confidence and prohibits successful collaborations to enhance tourism in the province. The lack of awareness and information dissemination also leads to a lack of acting and making the most of available opportunities. This relates to the community who are not aware of how tourism works and its impact on society, entrepreneurs that are not aware of support programmes that can help them fund and build their businesses and government departments and tourism organisations that are unaware of the projects and programmes initiated/hosted by one another.

In order to alleviate the impact of some of these barriers, the following recommendations are suggested, along with the possible positive outcome of each:

Collaboration between public and private sector	• Benefits for investment
	• Unity among stakeholder and nation building
	• Amplify influence over economic development
	• Joint commitment to increasing sector productivity
	• Cooperation between these two sectors allows destinations to offer quality products and to exceed consumer expectations, which will further ensure destination maintenance successfully and in the long term[21]
	• Improvement of infrastructure and public services
Information distribution between	• Effective coordination and management of information
	• Stronger statistical representation

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[21] Buhalis (2000)

government spheres	• 'One mind' approach
Roles & responsibilities	• Clarity and focus on individual roles eliminates duplication of actions, unnecessary waste of resources and enhances overall productivity
Availability and management of funds	• Better control and responsible management of allocation of funds • Follow up on progress and outcomes of funded projects • Accountability within departments and organisations relating to the approval and allocation of funding towards tourism

7.2 Institutional Tourism Framework Recommendation

The institutional environment analysis shows the tourism sector in Mpumalanga as highly prioritised within its institutional structure. The following diagram represents the recommended institutional arrangement surrounding tourism development and growth in Mpumalanga:

Figure 24: Proposed Institutional Framework for tourism in Mpumalanga
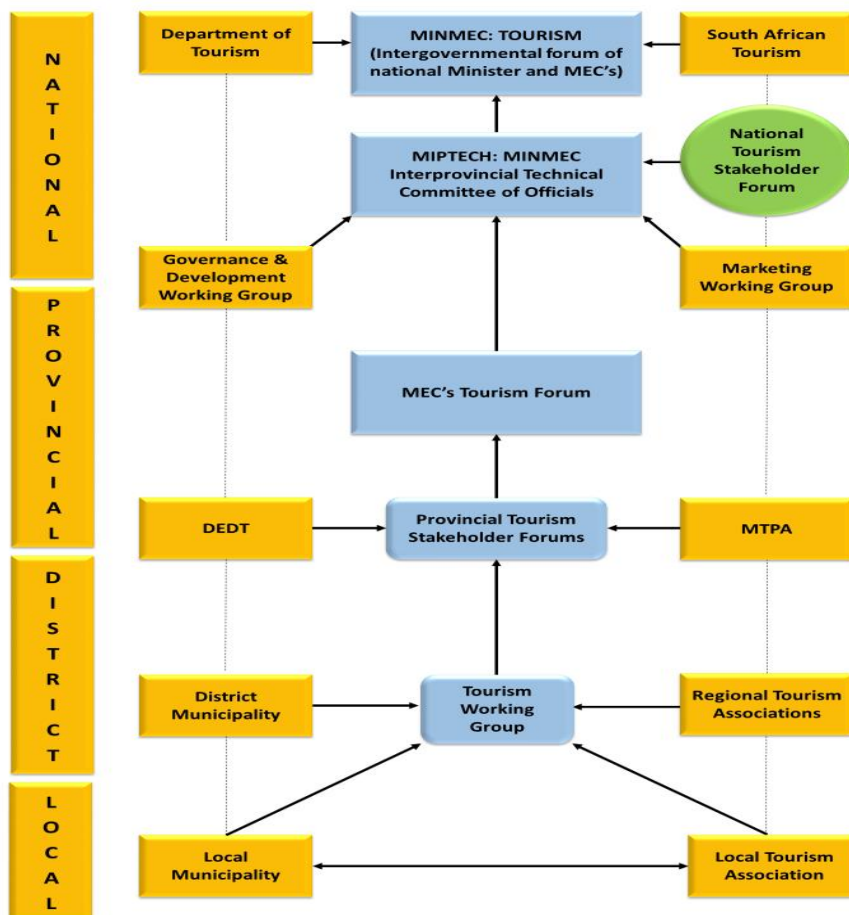
Source: Adapted from the NTSS (2016-2026)

The growth of the tourism economy depends on effective government structures and processes that manage and support tourism. The engagement between government, the private sector and other relevant stakeholders is crucial on national, provincial and local level. Adequate communication channels and other interactive platforms provide role players with the opportunity to deliberate on tourism matters and bring to light the challenges experienced in the tourism sector. These communication channels also enable a 'one vision' approach that will drive and guide tourism moving forward. Stakeholders and government alike can capitalise on this vision to obtain proper funding for tourism initiatives and solve challenges. The institutional structures of the various levels of government are briefly discussed below (as adapted from the NTSS).

On National level, key structures include the National Department of Tourism who is responsible for national tourism policy, regulation and development. South African Tourism is responsible for marketing South Africa as a tourism destination and to provide strategic leadership on convention bureaus. MIPTECH coordinates provincial and national affairs in preparation for the MINMEC, whereas the MINMEC discusses and agrees on national tourism policy matters. To ensure coordination and collaboration, the Tourism Working Groups deal with governance, planning and marketing issues as an intergovernmental structure. The National Tourism Stakeholder Forum, coordinated by the NDT, addresses strategic issues including. for example, the implementation of the NTSS. To ensure that provincial priorities are considered at national level, the MEC will take these matters to MINMEC for consideration.

On Provincial level, the DEDT is mandated by legislation to develop tourism. Their strategic goals are: sustained economic development that increases employment alleviates poverty and addresses inequality among the citizenry, flourishing domestic and foreign tourism, and increased inclusivity of all stakeholders in the sector. The provincial tourism marketing authority, the MTPA, should align their international tourism marketing effort with those of SAT to ensure combined effect. MTPA's main objective is to provide for the sustainable management and promotion of tourism and nature conservation in the Province and to ensure the sustainable utilisation of natural resources. They also make it their mission to grow tourism and manage bio-diversity to stimulate sustainable economic growth that is inclusive and creates decent employment. It is recommended that they also communicate and coordinate their marketing with the regional tourism organisations. Tourism benchmarking with other provinces reveals a new trend in South Africa where a tourism destination marketing agency is established which is solely devoted to tourism marketing in the province. Through this agency, resources (i.e. human resource capacity, funding, tourism expertise and marketing strategies) are directed and applied towards promoting the province and enhancing its competitiveness. For this to be implemented in Mpumalanga, a review of the functionality of the MTPA is recommended, whereby the possible division and establishment of such a tourism agency, that operates separately from parks and conservation, can be explored. Stakeholder engagements have confirmed that conservation priorities and the promotion of tourism present conflict of interest, as each of these functions represent different organisational priorities. The need exists for a tourism agency that is dedicated specifically to tourism

marketing in the province, as this will eliminate capacity restrictions, provide focus and attention where it is due and ensure the efficiency and effectiveness of the entity, and the tourism sector going forward.

The MEC Tourism Forum addresses cooperative tourism programmes and strategies and should therefore be informed about provincial tourism interests, challenges and priorities which need national attention for consideration by MINMEC. Provincial Tourism Stakeholder Forum provides a platform for the public and private sectors to consider planning, development and marketing issues These matters are then communicated to the MEC Tourism Forum.

On Regional level, the Tourism Working Group determine tourism priorities to support tourism growth and development in the region. They also facilitate cooperation and alignment with provincial tourism development priorities. This arrangement, although not a formal institution, can be replicated on local level whereby local municipalities and LTO's communicate relevant tourism priorities/constraints with one another. Tourism-related responsibilities lie with the municipalities as well as the regional and local tourism organisations. The introduction of RTOs (at district municipality level) and LTOs (at local municipality level) have been welcomed by district municipalities in the Province. They are seen to be good vehicles to support the growth of the tourism sector and to encourage the involvement of all South Africans in the sector. The district municipalities are considering financial and non-financial support to some of the operational programmes of RTOs, once transformation has been achieved.

It is vital that the institutional framework feeds into and supports the goals of the spheres of government and follows a structured approach to regulating and facilitating the growth and transformation of tourism sector.

Section 8: Implementation Plan

8.1 Overview

The implementation plan is the principal tool for guiding the development of the tourism sector in the Province. The purpose of the implementation plan sets out the measures that will be implemented over the next five years in order to achieve the goals outlined within the tourism strategy. Mpumalanga's vision for tourism can be realised should the institutional framework operate effectively in carrying out the implementation actions within the allocated timeframe.

The purpose of this section is to provide guidance on using the plan. It requires balancing the aspirations of the tourism sector and adapting to conditions that will change over the life of the plan. Implementing the plan will require continued coordination with government departments, municipalities, tourism organisation and other stakeholders.

8.2. Implementation Items

Implementation tools and timeframes are outlined in the plan- the following is a directive on the implementation items that are allocated to the relevant action to be taken.

8.2.1. Implementation Method

The implementation method specifies the main functions that should be performed by the 'responsible' party. Implementation methods include Planning, Marketing, Facilitate, Develop and Support and it is carried out in collaboration with other relevant role players.

Planning	Refers to setting up the groundwork for a project, compiling the draft/design. Arranging for the relevant procedures to be put in place.
Marketing	Refers to the creation, presentation and delivery of value product- and- service offerings. It involves researching, promoting, selling and distributing that which makes the Province a competitive tourism destination.
Facilitate	Refers to sharing resources and clearing the way for something to take place. It also involves making things possible and/or easier to achieve.
Development	Refers to the process of developing something, growing or advancing a process or project. Development is putting 'into motion' and driving a certain venture.
Support	Refers to providing encouragement and assistance. it also includes a level of maintenance as well as mentoring and evaluation.

8.2.2. Priority Level

The priority level involves priority assignment to every action or process, the priorities are ranked in terms of importance. Factors that influence priority ranking include urgency, value, timeframe, cost, marketing and other operational and developmental challenges. Priority assignment is evaluated on the following level of importance/urgency:

Priority Level	
Low	These actions are recommended and necessary, however, it does not have an immediate impact on the quality, performance, or functionality of the tourism sector. This includes cases of general requests that is not tied to a specific mission milestone and has the least business impact.
Medium	These actions have equal priorities and are carried out on a first-come-first-served basis. They are 'potentially critical' and are subject to availability of resources. These actions operate within medium business impact.
High	Processes/actions with highest priorities are carried out first. They are labelled as 'currently critical'. These actions operate within a priority basis of high business impact.

8.2.3. Timeframe Scheduling

Timeframe scheduling refers to a specified period in which the identified actions occur or is planned to take place. The timeframe for the Mpumalanga Tourism Strategy is five years in which the necessary actions should be addressed and implemented. In some instances, the priority level and timeframe priority correspond where actions of highest priority should be implemented as soon as possible. However, due to time, rigorous planning and facilitation processes, other high priority actions take longer to get off the ground and are therefore scheduled to be implemented over the entire strategy implementation period.

The timeframes for the strategy are as follow:

Timeframe Schedule	
1-3 Years	This involves projects that should be addressed as soon as possible. Their priority levels may vary, however the implementation is possible within a shorter time should the relevant partnerships collaborate effectively.
3-5 Years	Due to the nature of these projects and programmes, the implementation thereof is dependent on the following: Many of these actions follow on the actions to be implemented within 1-3 years. Once those projects have been dealt with, then the others can be sufficiently addressed.
5+ Years	These projects involve ongoing processes, continuous planning and development, and are gradually implemented over a longer period.

Ongoing evaluation of the strategies and status of completing actions in all these different categories, will be critical for long-term revitalization of the tourism sector. The purpose of the Implementation Plan is to provide a collective resource that identifies the implementation action, the party responsible, the possible partnerships that can be formed with other stakeholders and the level of importance and urgency of each action.

8.3 Implementation Table
Marketing and Promotion

Pillar	Focus Area	Actions	Responsible	Implementation Method	Partnership	Priority Level	Timeframe Priority (Years) 1-3	3-5	5+
Marketing and Promotion	Market Segmentation	Focus marketing efforts and tour packages to specific markets i.e. millennials, families, couples, seniors, backpackers	MTPA, Travel Agents, Tour operators	Facilitate	RTOs, Private Sector, SANParks	Red	filled		
		Package tours for emerging markets e.g. Asian market. Encourage tour operators to diversify packages.		Planning		Green			filled
	Destination Marketing to Domestic Market	Package affordable offerings for this market- value for money products, family & recreation	MTPA, Media	Development	Wholesalers, Retail Partners, Tourism Attractions, Local Government, Private Sector	Red	filled		
		Capture millennial market with off-peak and mid-week travels- package 'specials'		Facilitate Marketing		Red	filled		
		Create a strategy for weddings and celebrations for residents and key markets e.g. Gauteng				Red	filled		
		Partner with major National radio stations to campaign tourism offers in the province (5FM, Metro FM, Jacaranda FM, Highveld, East Coast Radio, Power FM, Motsweding FM, Lesedi FM, RSG, Radio 702 etc.)		Planning		Yellow	filled		
	Brand Management + Destination Positioning	Make use of more innovative distribution channels- promotional videos, host competitions/challenges and create discussion platforms on social media	MTPA, Travel Agents, Tour operators	Facilitate	Local Government, Tourism Organisations, Private Sector, ICT	Red	filled		
		Promote and encourage making use of database marketing to build client relations and build trust		Support		Green	filled	filled	filled
		Create branding strategy for MP to promote offerings in all regions and clusters e.g. Heritage		Planning		Green	filled		
	Events Strategy	Develop and host more festivals, e.g. 'annual Mpumalanga festival' (food, crafts, entertainment, prizes)	DEDT, MTPA, Provincial Convention Bureau	Development	Local Government, DCSR, Private Sector	Red	filled		
		Develop events calendar and coordination for seasonality and geographical spread.		Planning		Red	filled		
		Improve the services and access of municipal facilities for event usage.		Facilitate		Red	filled		
		Motivate more sporting and adventure events		Facilitate		Red	filled		
		Support youth initiatives and events (events established by youth)		Development		Red	filled		

						Priority Level	Timeframe Priority (Years)		
	MICE Market	Enable functioning of Convention Bureau in collaboration with private sector	MTPA	Facilitate	Private Sector, Provincial Convention Bureau				
		Create incentive packages that are more wide spread across the provinces to expand business tourists' exposure to what the province has to offer	DEDT,	Planning	MTPA, Private Sector				
		Investigate the potential for a Mpumalanga International Conference Centre (ICC) in Mbombela in order to host large international conferences	DEDT, DCSR	Planning Development	MTPA, Private Sector				

Destination Accessibility

Pillar	Focus Area	Actions	Responsible	Implementation Method	Partnership	Priority Level	Timeframe Priority (Years)		
							1-3	3-5	5+
Destination Accessibility	**Universal Access**	Accommodate the disabled in destination planning approaches-ablution, walkways, parking etc.	DEDT, DOT, NDT,	Facilitate	Municipalities, Product Owners				
		Create safe and interactive environments for people with young children.		Facilitate					
		Encourage attractions and amenities to take consideration of elderly travellers enroute to tourism destinations		Facilitate					
		Include provision for people with disabilities, in municipal by-laws		Planning					
	Improve Accessibility to the Destination through Signage, Roads, Air & Rail Transport and ICT	Implementation of the tourism signage strategy, focussing on signage en route to and within major tourism routes/hubs (e.g. R536, R352, R36)	NDT, PWRT, SALGA, DOT	Facilitate	Municipalities, Private Sector, Airlines				
		Improvement of air access and pricing to Nelspruit and the Greater Kruger		Facilitate Support					
		Improve road infrastructure en route to, and at tourism destination (i.e. R540, R536, R525, R534, R537)		Planning					
		MTPA must provide relevant, reliable, up-to-date online marketing information that are readily available to tourists	MTPA	Facilitate	Private Sector Municipalities				

Pillar	Focus Area	Actions	Responsible	Implementation Method	Partnership	Priority Level	Timeframe Priority (Years)		
							1-3	3-5	5+
		Encourage product owners and municipalities to make sure their websites are running and have the latest information available	DEDT, MTPA	Facilitate Support		🟥	🟩	🟩	🟩
						🟥			
	Tourist Transport	Provide tourists public transport system between attractions and activities within the districts	DOT,	Development	DEDT, MTPA, Private Sector	🟩	🟩		
		Creation of activity nodes (e.g. in Hazyview, Barberton, Sabie, Chrissiesmeer) where tourists can come together and decide which activity to participate in- from there they can get on a shuttle and be transported to the activity	DEDT	Planning	MTPA, Private Sector	🟩	🟩		

Destination Management

Pillar	Focus Area	Actions	Responsible	Implementation Method	Partnership	Priority Level	Timeframe Priority (Years)		
							1-3	3-5	5+
Destination Management	**Improve the Focus, Funding and Delivery of Tourism Marketing and Development**	Coordinate marketing and development initiatives between: government departments, between public and private sector	MTPA, DEDT	Facilitate Support	Local Government, Tourism Organisations, Product Owners	🟩	🟧	🟧	
		Facilitate MTPA and RTO coordination				🟩	🟧		
	Training and skills Development of Municipal Officers and General Sector Employees	Host workshops and roadshows with Training Programmes and Services companies to create awareness of all available skills training	NDT, DEDT	Planning	MTPA, Private Sector, Municipalities	🟥	🟧	🟧	🟧
		Partner with product owners in advertising and providing future (hospitality) students with training and skills internships within the sector		Facilitate		🟥			
	Improve Understanding of, and Enhance Support for Tourism Across Provincial Government Departments	Coordination between departments for effective communication and execution of functions	DEDT, MTPA	Facilitate	Municipalities, Private Sector	🟩	🟧	🟧	
		Promote stronger collaboration with private sector so that opportunities and challenges can be dealt with as soon as they are raised		Support		🟩	🟧		

Pillar	Focus Area	Actions	Responsible	Implementation Method	Partnership	Priority Level	Timeframe Priority (Years) 1-3	3-5	5+
	Introduce Best Practice Approaches and Risk Management Tools	Implement support systems in risk management and business rescue programmes through workshops presented to the industry to introduce them to these management tools	MTPA, DEDT	Development	TGCSA, Private Sector	Red	Orange	Orange	Orange
	Encourage & Assist with the Grading of Establishments	Develop support programmes to guide product owners in the grading process	MTPA, DEDT, TGCSA	Development	Private Sector, SANParks	Green	Orange		
		Promote meaningful benefits and cost structure to encourage grading		Planning		Green	Orange		
		Ensure employment of qualified persons from local area		Facilitate		Green	Orange	Orange	Orange
	Benchmarking	Develop realistic targets and deliverables in tourism-related strategies (promotion investment, marketing, heritage and culture, ICT)	MTPA, DEDT	Development	Private Sector	Red	Orange		
	Research & Statistics	Develop a data collection system in collaboration with other industry players to collect and store real data as to generate more reliable statistical information to base strategies on	MTPA, Travel Agents, Tour Operators, Municipalities	Facilitate	Local Government, DEDT, Stats SA, Private Sector	Red	Orange	Orange	Orange
	Service Delivery	Provide reliable service delivery to create a pleasant experience for tourists, residents and product owners	Municipalities	Planning	Local Government, PWRT	Red	Orange		
	RTO & LTO Support	Provide support & funding to organisations as partners in tourism- Facilitate ad hoc tourism assemblies to enable interaction and provide the opportunity to raise concern or ask for assistance	DMs, LMs, Sector Representatives	Support	DEDT, MTPA	Green	Orange	Orange	Orange
		Actively promote and implement the RTO framework document and follow up its implementation progress	DEDT	Facilitate Support	Local Government, Municipalities, RTOs, LTOs	Green	Orange	Orange	Orange

Product Innovation

Pillar	Focus Area	Actions	Responsible	Implementation Method	Partnership	Priority Level	Timeframe Priority (Years) 1-3	3-5	5+
Product Innovation	New Product Development	Create niche products based on local assets e.g. relaunch the Panorama Route	DEDT	Development	Private Sector				
	Product Rationalisation & Innovation	Upgrade offerings along the Panorama Route i.e. Mathibi, Moremela & Leroro	DEDT, Private Sector	Facilitate	Municipalities, MTPA, SANParks				
		Investigate the potential of reviving the attractions of Pilgrims Rest in order to breathe new life into it e.g. launch new marketing campaigns, develop an event for the town like a carnival/trade show to attract visitors	MTPA	Marketing Planning	DEDT, Private Sector, Municipalities				
	Heritage & Cultural Tourism	Package and market more interactive & educational cultural experiences for tourists e.g. Ndebele heritage and prestige (Esther Mahlangu legacy)	MTPA, DEDT, Local Government, Private Sector	Planning	DAC, SAHRA, Municipalities, Private Sector				
		Develop a Ndebele Arts & Design Centre in Nkangala		Development					
		Investigate and promote commercial potential of WHS Barberton Makonjwa Mountains	DEDT, MTPA	Facilitate Marketing	Local Government Private Sector				
		Revitalise the current Tourism Heritage Route	DEDT, MTPA	Facilitate Marketing	Local Government Private Sector				
	Encourage Responsible & Sustainable Tourism	Emphasise conservation of assets and educate the importance thereof Host Responsible tourism workshops/awareness projects/ implement a 'Responsible Tourism Day' that features various informative discussion sessions. Get experts to lead talks.	DEDT, MTPA	Support / Facilitate	Private Sector, Municipalities				
		Implement educational conservation projects/activities and get communities and local schools involved	DEDT, MTPA	Facilitate Develop Support	Local Schools, Tertiary Institutions, Dept. of Education				
	Tourism Route Possibilities	Investigate the potential for Industrial Tourism in the Gert Sibande & Nkangala Districts	MTPA, Local Government, Private Sector	Facilitate	DAC, Municipalities				
		Do adequate research/marketing to develop the best tourist routes- Routes that highlight offerings of different districts i.e. the agriculture and manufacturing sectors of Gert Sibande & Nkangala		Planning					

Pillar	Focus Area	Actions	Responsible	Implementation Method	Partnership	Priority Level	Timeframe Priority (Years)		
							1-3	3-5	5+
	Township Tourism	Identify townships within al the districts that have potential/ unique offerings to be packaged for township tourism	DEDT, MTPA	Planning Facilitate	Local Government Private Sector	🟩	🟧	🟧	
		Promote arts and craft market hubs along tourist routes (e.g. Rainbow Route, Escarpment Route)	MTPA, DEDT, Local Government, Private Sector	Facilitate	DAC, Municipalities	🟩	🟧	🟧	
		Encourage community participation in developing Township Tourism packages in the rural areas of Gert Sibande & Nkangala Districts		Support		🟩	🟧	🟧	
	Package Guided Tours for Special Interest Groups	Ensure that all tourist guides are qualified and registered	DEDT, MTPA	Development	Private Sector, Municipalities, DAC	🟨	🟧	🟧	
	Promote Business Tourism	Evaluate the quality and capacity of MESE facilities to identify gaps in the market to improve business tourism and benefit SMME's	DEDT, MTPA	Facilitate	Private Sector	🟥	🟧		
		Each district to develop tourism packages (+- 3 products) that are quick and easy for the limited time that business tourists spend at a destination.		Development		🟥	🟧		

Visitor Experience

Pillar	Focus Area	Actions	Responsible	Implementation Method	Partnership	Priority Level	Timeframe Priority (Years)		
							1-3	3-5	5+
Visitor Experience	**Enhance Attractiveness of Destination**	Upgrade and maintain public tourist facilities and sites enroute to destinations and at the destination	Public Works	Facilitate	Local Government, MTPA, SANParks	🟥	⬜		
		Upgrade and develop provincial nature reserves and protected areas to benefit CPAs and local communities.	DEDT, MTPA	Facilitate	SANParks, Local Government	🟥	⬜		
	Cleanliness and Safety & Security	Tourism Police Units/Visible policing at tourism 'hubs' e.g. for strikes on roads, general tourist safety.	PWRT, SAPS	Planning Facilitate Support	DEDT, Private Sector, MTPA	🟥	⬜		
		CCTV Cameras at busy touristic spots (at attractions & activities)				🟥	⬜		
		Visibility of emergency services information and access				🟥	⬜		

Pillar	Focus Area	Actions	Responsible	Implementation Method	Partnership	Priority Level	Timeframe Priority (Years)		
							1-3	3-5	5+
	Improve Information Provision	Revitalise and reposition information centres across the province that are interactive and interpretive	MPTA, DEDT	Development	Private Sector, Municipalities, SAT	🟩	⬜		
		Employ trained and knowledgeable information officers to manage these posts		Facilitate					
		Encourage all product owners to keep their websites and systems updated making use of relevant and reliable ICT channels		Facilitate					
	Enhance Tourist Safety	Ensure effective responses to incidents of crimes against tourists	DEDT, SAPS,	Planning Facilitate Support	Dept of Community Safety, Security & Liaison MTPA	🟥	⬜		
		Known, well-published, working 24hour call line for help to assist tourists							
	Facilitate Tourist Travel through Improved Private & Public Transport	More (affordable) buses between different towns and to and from tourist attractions	DOT, MTPA	Facilitate	PWRT, Private Sector	🟩	⬜	⬜	
		Revitalise railways to operate in an effective and productive means within the tourism sector		Planning					
	Improve Tourism Skills and Service Excellence	Provide continuous 'inhouse' training at tourism establishments	SETAs, DEDT	Facilitate	NDT, Private Sector	🟥	⬜	⬜	⬜
		Equip young entrepreneurs with necessary tools to build their own business by introducing them to the support channels/programmes currently available in the province (NDT, NEF, IDC, SEDA)							
		Promote mentorship programmes to inform and update tourism product owners on latest skills development and implementation tools in the sector		Support					
	Focus on Multi-facetted Tourism Experience	Implement educational element to tourist experiences where local history, culture and heritage and environmental conservation is shared with visitors	MTPA, Local Government, Public Sector	Planning	Local Municipalities, Tourism Attractions, Tour Operators, Travel Agents, DAC, SANParks	🟨	⬜	⬜	
		Develop interactive communication/participation platforms with local communities to create awareness and educate on eco-tourism initiatives e.g. greening of products		Facilitate					
		Develop participation packages for tourists to interact with local communities and learn about local cultural practices	MTPA, DEDT	Develop Facilitate	Private Sector	🟨	⬜	⬜	

Transformation and SMME Development

Pillar	Focus Area	Actions	Responsible	Implementation Method	Partnership	Priority Level	Timeframe Priority (Years)		
							1-3	3-5	5+
Transformation and SMME Development	Achieve Broad Based Black Economic Empowerment (B-BBEE) Targets	Create awareness and provide business training to young entrepreneurs who want to enter into the tourism sector (accommodation, hospitality, travel support services)	DEDT NDT	Facilitate Marketing	Emerging SMMEs, Private Sector, TEP				
		Encourage entrepreneurship through stronger awareness of available support programmes (funding channels, business plan development etc.) to assist SMME owners							
		Collaborate with funding channels (NEF, IDC, NDT) & promote funding support and mentorship programmes through visits to communities/schools							
		Host workshops & consultation sessions to create awareness & educate the people on the opportunities that they, as aspiring business owners, can capitalise on		Support					
	Expand Benefits of Tourism to Rural Areas	Develop tourism products for 'peripheral' areas, provide infrastructure to support crafters in displaying their work	DEDT	Planning, Development	Private Sector				
		Develop activity nodes to attract tourists to these areas and encourage local community participation to expand benefit spread		Facilitate					
		Beneficiation of communities through the operation and management of provincial nature reserves.		Facilitate					
		Sustainable establishment of community cooperatives relating to cultural products and tourism services	DEDT	Facilitate	Private Sector				
	Encourage Community Participation	Initiate participation programmes assist private entities to incorporate community participation programmes in their operations	DEDT	Facilitate	Municipalities, Private Sector				
		Provide, on district level, a platform for negotiating interest with local communities		Support					

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Pillar	Focus Area	Actions	Responsible	Implementation Method	Partnership	Priority Level	Timeframe Priority (Years)		
							1-3	3-5	5+
		Allow access for SMMEs to 'big players' and create support systems for SMMEs within the private sector through interactive industry workshops		Facilitate Support					
		Host an (annual) provincial "Tourism Indaba" and create networking opportunities for the SMMEs and other more mature industry players	DEDT MTPA	Planning Facilitate	Local Government, Private Sector, SMME owners, entrepreneurs				

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