



tourism

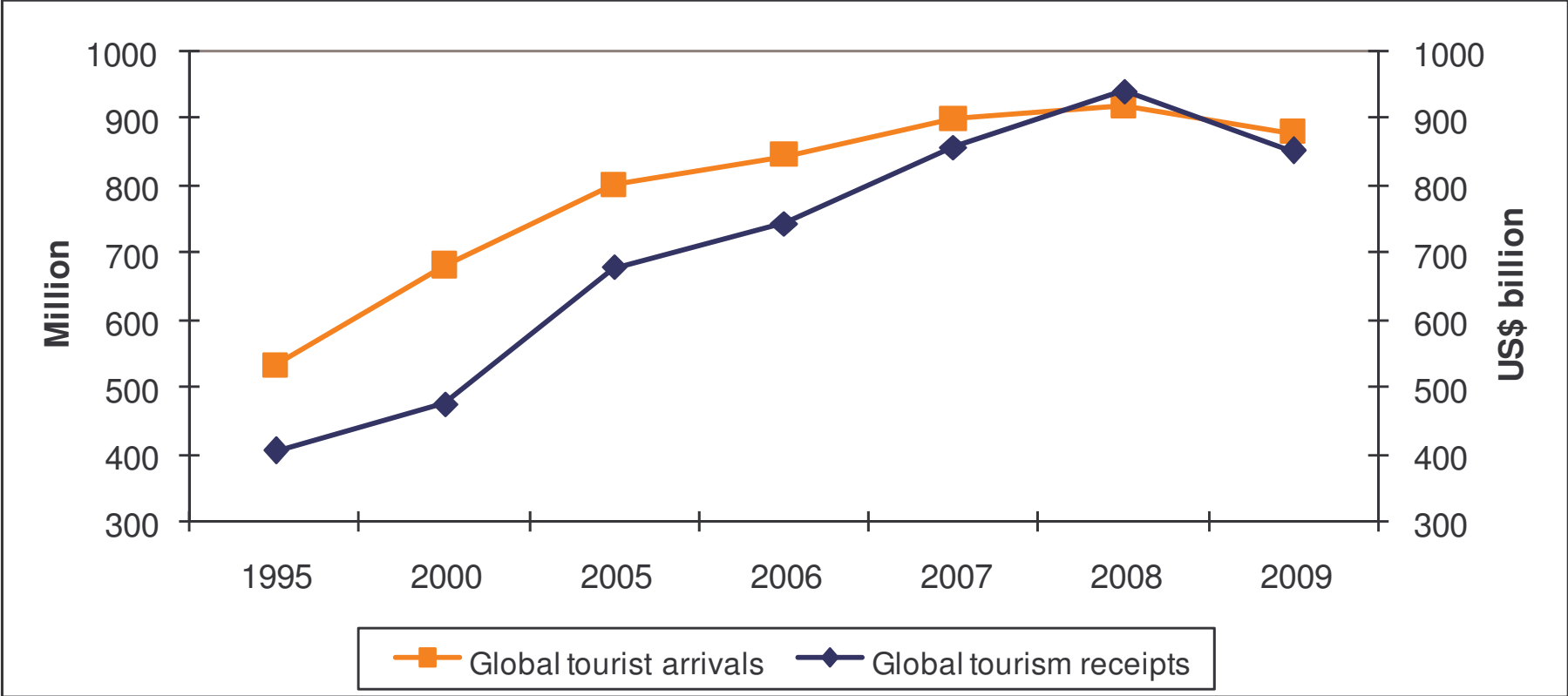
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Press briefing

Draft National Tourism Sector Strategy

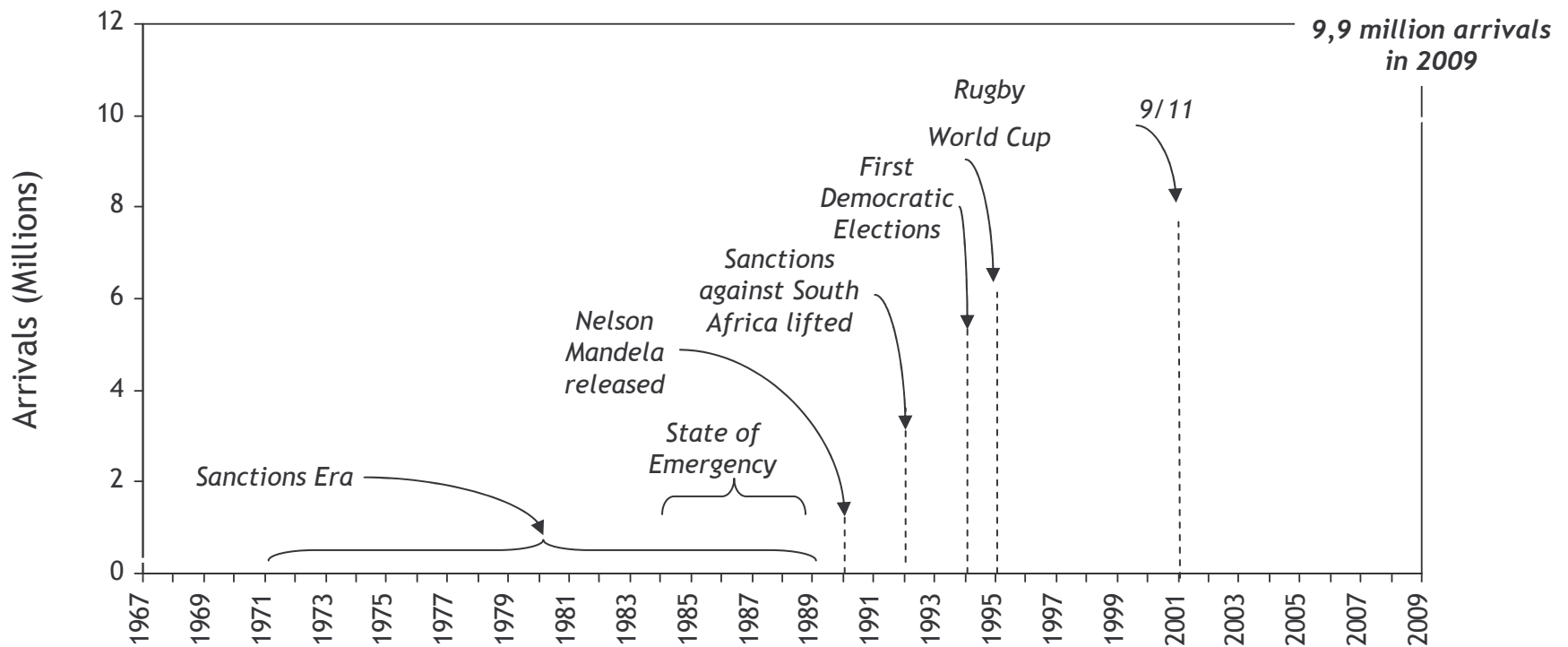
21 May 2010

GLOBAL PICTURE



Arrivals to South Africa continues its upward climb reaching 9,9 million arrivals in 2009

Foreign Tourist Arrivals to South Africa, 1967-2009



1970s and 80s - Stagnation

- Stagnation drove low investment, focus on narrow white domestic market and costs

1990-1998 - Growth

- Initial period of short-term profit-taking followed by period of investment growth and entry of foreign players

1998-2004 - Cyclical

- Global events, currency volatility drove uncertainty and short-term strategy by firms
- Investment rates remain weak overall

*Comments captured above based on opinion of participants interviewed and anecdotal evidence

Source: Stats SA, Tourism & Migration release

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



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

SCENARIOS AND ASSUMPTIONS

- **There is complete recovery from recession across the world (particularly in our core and investment markets);**
- **The country continues to collect revenue above target allowing for increased allocations to tourism;**
- **A positive and memorable 2010 experience for visitors and for viewers, listeners and web surfers;**
- **There is conducive political, policy and regulatory environment for travel and tourism;**
- **Complete ownership of responsibilities by all parties.**
- **There is limited blockages (e.g. natural disasters, access to development finance, market access...);**



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THE DEVELOPMENT OF THE NTSS

- took into account the:
 - principles and objectives of the Tourism White Paper of 1996;
 - electoral mandate (e.g. growth and decent job creation);
 - medium-term strategic framework priorities;
 - new outcomes-based approach to government performance;
- recognised:
 - tourism is a concurrent function across all spheres of government;
 - enabling role that other government departments play in tourism;
 - role that private sector and ordinary South Africans play in making tourism a success;
- acknowledges:
 - that tourism, both internationally and domestically, has grown significantly since 1994 but recognises that it has not yet reached its full potential;



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VISION

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

MISSION

We will achieve our vision through:

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



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RESPONSIBLE GROWTH OBJECTIVES

- 1 To grow the tourism sector's absolute contribution to GDP by more than average GDP growth**
- 2 To achieve transformation within the tourism sector**
- 3 To provide excellent people development and decent work within the tourism sector**
- 4 To entrench a culture of travel amongst South Africans**
- 5 To deliver a world-class visitor experience**
- 6 To address the issue of geographic, seasonal and rural spread**



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KEY INDICATORS

- To grow the tourism sector's absolute contribution to GDP by more than average GDP growth;
 - To achieve transformation within the tourism sector;
 - To provide excellent people development and decent work within the tourism sector;
- Contribution to GDP and Employment;
 - Foreign Visitor Arrivals
 - Domestic Tourism;
 - Investment;
 - # of tourism industry companies with BBBEE ratings;
 - # of tourism industry companies reaching Tourism Charter Targets;
 - # of black majority owned companies (small, medium & large);
 - Culture of travel amongst South Africans;
 - # of population penetration of black domestic tourists;
 - Tourism industry provides decent work & the industry recognised as a provider of decent work;
 - Tourism industry provides an attractive career choice, skills development and career progression;



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KEY INDICATORS (cont.)

- To entrench a culture of travel amongst South Africans;
- To deliver a world-class visitor experience;
- To address the issue of geographic, rural and seasonal spread;
- Domestic holiday travel across all markets;
- Develop a positive attitude to and a greater propensity / willingness to undertake leisure travel and holidays in SA amongst South Africans;
- Deliver experiences that equal/surpass expectations of foreign visitors;
- Meet or exceed expectations of domestic tourists;
- Share of foreign tourist bed nights spent in least and mid-level visited provinces;
- Share of domestic tourist bed nights spent in least visited provinces;
- Number of visitors and bed nights spent in rural areas;
- Supply of rural tourism products with acceptable patronage & revenue levels;
- Seasonality index of all foreign arrivals;
- Share of foreign bed nights in low season months;
- Share of domestic bed nights in low season months;



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KEY INTERVENTIONS

Demand

- Branding
- Convention Bureau;
- Strengthening of domestic tourism;
- International Marketing (core markets)
- New markets identification and development

Supply

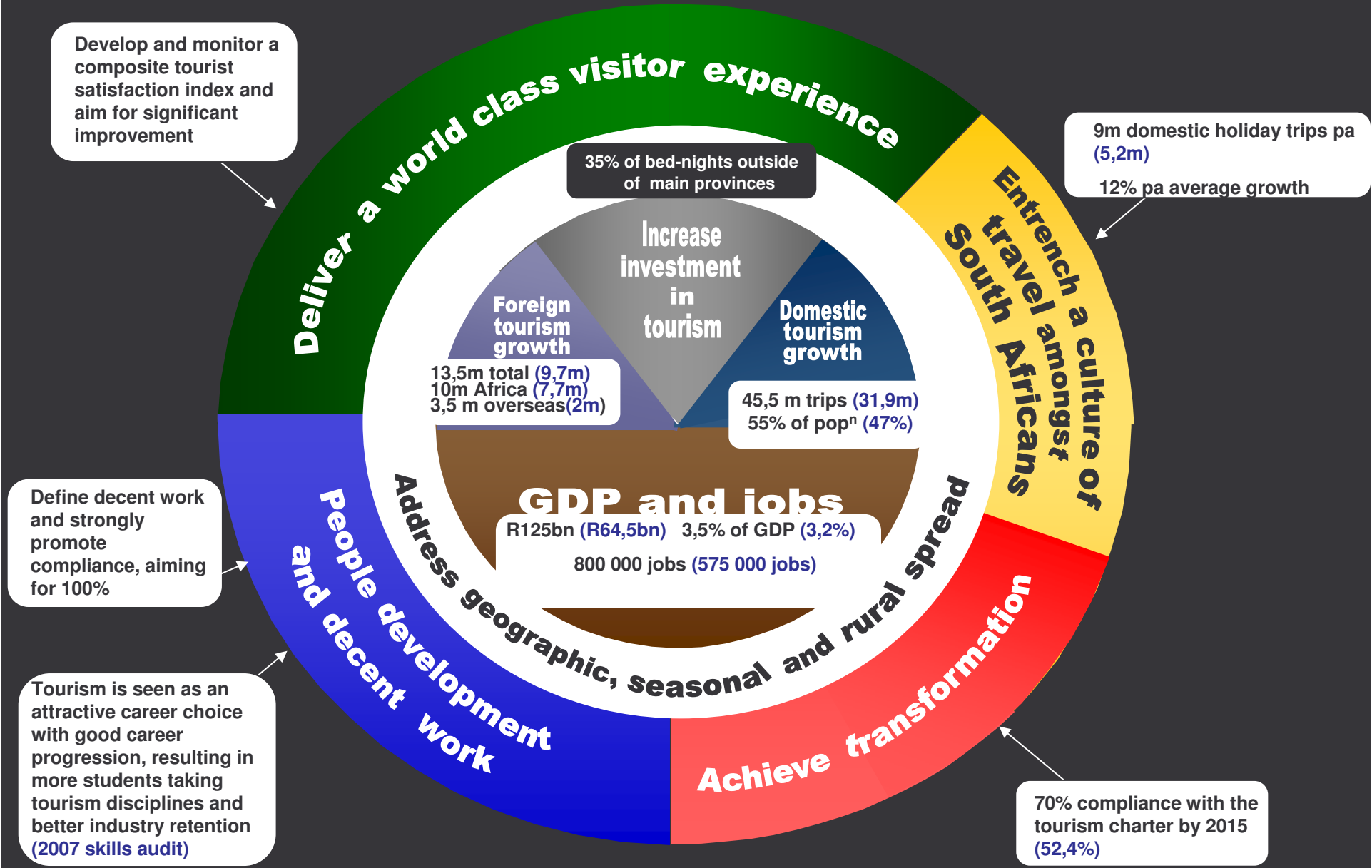
- Product development (e.g. cultural, heritage, rural);
- Niche tourism (e.g. science, cruise, medical);
- Strengthening of quality assurance (not only accommodation);
- Service excellence;
- Transformation (small, medium and large establishments);



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2015: KEY TARGETS



COORDINATION MECHANISMS

- Delivery Forum;
- Participation of private sector;
- Ownership of government entities;
- Proper monitoring mechanisms;



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It's Possible

TODAY

- launch the draft National Tourism Sector Strategy for public comment;
- the strategy can be accessed on: www.tourism.gov.za (url: <http://www.tourism.gov.za/Pages/tourism-Indaba.aspx>);
- Written comments can be send to:
 - strategy@tourism.gov.za ;
 - Not later than end of business on **31 July 2010**;



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THANK YOU



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