

NATIONAL TOURISM SECTOR STRATEGY (NTSS) 2016 - 2026

22 October 2019

broadening horizons



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA



Outline of the presentation

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I. Background

- The NTSS was commissioned for a review in 2015.
- The review was aimed at determining the necessary adjustments in the old NTSS, to ensure that it retains its relevance, and to align and give effect to the overarching national strategic plans and other critical policy determinations.
- The Review has taken into account critical issues and emerging trends that impact on the travel and tourism environment both at macro and micro level.
- The process culminated in a 2nd iteration of the NTSS.
- The NTSS 2016 – 2026 was approved by Cabinet in December 2017.
- NTSS is aimed at providing a strategic direction for the sustainable growth and development of the sector.



2.The Case for Tourism

- Tourism is one of the best performing economic sectors.
- Has the potential to increase jobs, foreign exchange earnings & balance of payments, provision of economic opportunity for youth, stimulates economic activity in rural areas, support development of SMME's.
- Supports the NDP's economic policy proposal for a more diversified economy.
- Has multiple linkages with other sectors of the economy and generate significant multiplier effects.

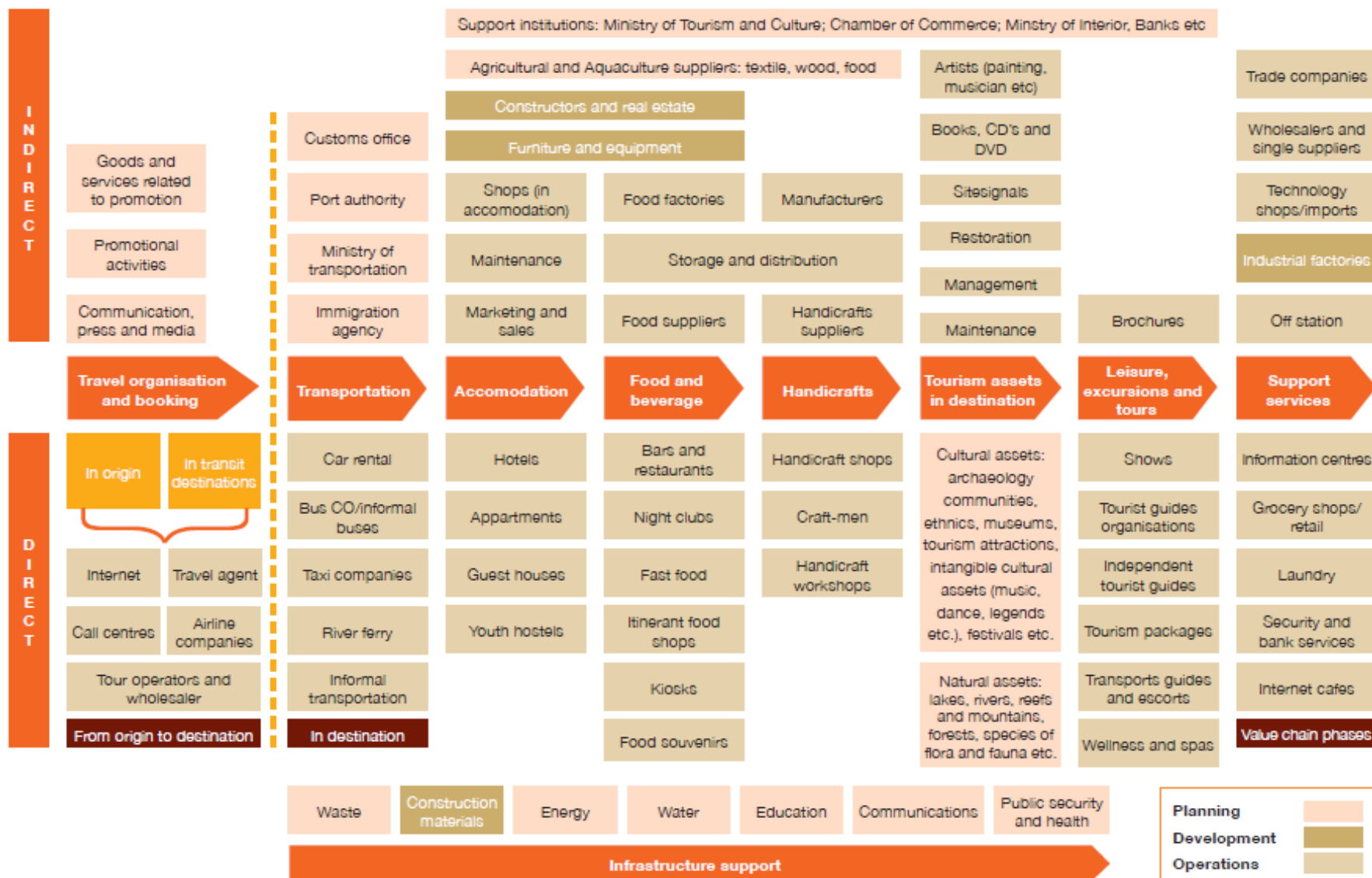


2.The Case for Tourism Cont...

- Tourism is a complex sector, composed of a very diverse series of industries and activities.
- It involves not only primary tourism businesses such as hotels, visitor attractions and tourism transport, but a wide range of facilities and services within the economy.
- Tourism is thus affected by, and has a bearing on, other factors and economic sectors that must also be competitive.
- Tourism is often perceived as being the exclusive domain of the ministry responsible for tourism - Yet, the very elements of tourism competitiveness are the responsibility of several different government departments, authorities, agencies and private sector interests.



3. Tourism Value Chain Model



4. NTSS Framework

- The Strategy has two main sections i.e. Part A and Part B.
- Part A Focuses on:
 - Consideration of the Policy & Technological Environment;
 - Appraisal of Domestic & International Tourism Trends;
 - Unpacks the Case for Tourism in South Africa and players in the Tourism Economy; and
 - Appraisal of Tourism Performance against 2011 NTSS Targets.
- Part B Outlines:
 - Vision, Mission & Values;
 - Measurements & Targets;
 - Strategic Pillars;
 - Actions Plans;
 - Institutional Arrangements;
 - Monitoring, Evaluation and Reporting.



5. Vision, Mission, Guiding Principles and Values

Vision	A rapidly and inclusively growing tourism economy that leverages South Africa's competitive edge in nature, culture, and heritage, underpinned by Ubuntu and supported by innovation and service excellence. A top world responsible tourism destination.
Mission	To increase the direct contribution of tourism to the economy through partnerships, research based collaborative planning, and the implementation of agreed priority actions.
Guiding Principles and Values	Trust, accountability, respect for arts, culture & heritage, responsible tourism, service excellence, upholding the values of our constitution & commitment to transformation.



6. Measurements and Targets

Indicators/Measure of Performance	2015 Baseline	2020 Targets(Est.)	2026 Targets(Est.)
Increase direct contribution to National GDP	R118 bn	R175 bn	R302 bn
Total contribution to National GDP	R375.502 bn	R548 bn	R941 bn
Number of direct jobs supported by the sector	702 824	802 526	1 mil
Number of total jobs supported by the sector	1 551 200	1 766 970	2.2 mil
Increase tourism export earnings	R115 billion	R182 bn	R359 bn
Increase in capital investment	R64 billion	R89 bn	R148 bn

Other indicators: Growth in international tourist arrivals, domestic trips and spend in all categories.

Source: World Travel and Tourism Council (2016)

7. NTSS Strategic Pillars

Inclusive
and
Quality
Growth of
the South
African
Tourism
Economy

- Effective Marketing
- Facilitating Ease of Access
- The Visitor Experience
- Destination Management
- Broad Based Benefits



7.1 Effective Marketing

Outcome Statement:

A coherent approach to promote South Africa to become top of mind destination and improved conversion rate

- Winning campaigns to attract international and domestic tourists with improved conversion rates;
- Improve market and segment prioritization;
- Enhance effectiveness of international marketing;
- Expand and improve domestic marketing activities and travel facilitation programmes;
- Establish effective brand management of the South African Tourism brand;
- Hosting of events to improve seasonal and regional spread of tourism benefits.



7.1 Effective Marketing

OBJECTIVE	ACTIONS	PARTNERS
Improve market and segment prioritisation	Institute an improved priority tourism market identification tool to deliver increased volume and value and to optimise and maximise limited resources.	Lead: SA Tourism Contributing Partners: Provincial Tourism Marketing Agencies, Local Tourism Marketing Agencies, Industry (TBCSA)
Enhance effectiveness of international marketing	Design and implement product driven marketing approach.	Lead: SA Tourism Contributing Partners: Provincial Tourism Marketing Agencies, Local Tourism Marketing Agencies, Industry (TBCSA)
	Introduce a comprehensive set of marketing campaigns and resources for priority markets with collaboration from industry.	Lead: SA Tourism Contributing Partners: Provincial Tourism Marketing Agencies, Local Tourism Marketing Agencies, Industry
	Develop and implement an International Tourism Relations Plan/Strategy to leverage on Diplomatic and multilateral relations.	Lead: Department of Tourism Contributing Partners: DIRCO, DEA, SA Tourism, Brand SA and TBCSA

7.1 Effective Marketing Cont..

OBJECTIVE	ACTIONS	PARTNERS
Establish effective brand management of the destination brand (South Africa)	Confirm and implement brand management protocol including specific crisis protocol.	Lead: GCIS and DIRCO Contributing Partners: SA Tourism, Provincial Tourism Marketing Agencies, Local Tourism Marketing Agencies, TBCSA and Department of Tourism
Expand and improve domestic marketing activities and travel facilitation programmes	Implement a substantially enhanced and expanded Domestic Tourism Marketing Strategy.	Lead: SA Tourism Contributing Partners: Provincial Departments, Local government (particularly cities), Trade, Product Owners and Department of Tourism



7.1 Effective Marketing Cont..

OBJECTIVE	ACTIONS	PARTNERS
Expand and improve domestic marketing activities and travel facilitation programmes	Implement the revised Domestic Tourism Growth Strategy based on new consumer insights and update to align with the expanded SA Tourism Marketing Strategy and the Domestic Travel Facilitation Programme.	Lead: Department of Tourism Contributing Partners: SA Tourism, Provincial Departments, Local Destination Marketing Agencies, Attractions, Educational, Environmental and Heritage Institutions and Transport Providers
	Encourage and support Regional and Local Tourism Organisations to communicate the importance of regional and local campaigns in driving the domestic market and creating opportunities for domestic travel.	Lead: Provincial Tourism Marketing Agencies Contributing Partners: Provincial Departments, Local Destination Marketing Agencies, Department of Tourism and TBCSA



7.1 Effective Marketing Cont..

OBJECTIVE	ACTIONS	PARTNERS
Attraction and hosting of events (business, sporting and lifestyle) to improve seasonal and regional spread of tourism benefits.	<p>Analyse the current calendar of major events and their impacts.</p> <p>Develop a strategy with reference to excellent global and local practice to support events that can improve regional and seasonal spread of tourism, particularly domestic tourism. (Bid for, and secure major international events).</p>	<p>Lead: SA Tourism</p> <p>Contributing Partners: Relevant Government Departments e.g. Sports and Recreation, Provincial Departments (Including Provincial Conventions Bureau), Local Destination Marketing Agencies, TBCSA and Department of Tourism</p>



7.2 Facilitating Ease of Access

Outcome Statement:

Seamless travel facilitation and access to participate in tourism.

- Addressing impediments that limit the ability of potential international tourists to travel to South Africa;
- Facilitate increased travel through the application of a tourist friendly visa regime and automated passenger movement and monitoring systems;
- Improve airlift access, particularly for priority markets;
- Ensure favorable regulatory environment to promote entrepreneurship and investment;
- Removal of barriers which impedes growth.



7.2 Facilitating Ease of Access Cont..

OBJECTIVE	ACTIONS	PARTNERS
Facilitate increased travel through the application of a tourist friendly visa regime and automated passenger movement and monitoring systems	Monitor and highlight any visa processing related challenges within priority markets for timeous response.	Lead: Department of Tourism and TBCSA Contributing Partners: SA Tourism country offices, Trade and DHA
	Implement modernisation initiatives in respect of visa processing for tourist travel facilitation.	Lead: DHA Contributing Partners: Department of Tourism, DoT, ACSA and TBCSA
	Design, implement, monitor and maintain an Accredited Travel Company Programme (ATCP).	Lead: Department of Tourism Contributing Partners: DHA, SA Tourism and TBCSA
	Participate in the Immigration Advisory Board (IAB).	Lead: Department of Tourism Contributing Partners: TBCSA and other tourism related members of the IAB

7.2 Facilitating Ease of Access Cont..

OBJECTIVE	ACTIONS	PARTNERS
Improve airlift access, particularly for priority markets	Monitor air service agreements, routes, carriers, air seats and load factors, from priority source markets and major carriers connecting priority markets to South Africa.	Lead: DoT and Department of Tourism Contributing Partners: SA Tourism, TBCSA, DoT's Air Transport Strategy Planning Committee (SPC)
	Ensure tourism requirements are specifically included in the implementation of the revised Air Transport Strategy through allocation of a senior Department of Tourism official to the SPC.	Lead: Department of Tourism Contributing Partners: DoT
	Provide clear tourism proposals and positions for inputs into Bilateral Air Services Negotiations / Agreements.	Lead: Department of Tourism Contributing Partners: SA Tourism and TBCSA
	Ensure that airport and border control authorities have the information needed to plan for tourism growth to facilitate the provision of resources needed to cope at peak times.	Lead: TBCSA Contributing Partners: Department of Tourism, SA Tourism and DoT

7.2 Facilitating Ease of Access Cont..

OBJECTIVE	ACTIONS	PARTNERS
Improve domestic air access	Develop and implement a Plan / Strategy aimed at encouraging domestic air travel to increase connectivity, frequency and affordability.	Lead: Department of Tourism and SA Tourism Contributing Partners: TBCSA (domestic airlines), Provincial Departments, Business Chambers and DoT
Create a conducive, legislative and regulatory environment for tourism growth	Conduct periodic review of policies with an impact on tourism in consultation with stakeholders to establish gaps and international best practice.	Lead: Department of Tourism Contributing Partners: TBCSA, Provincial Departments and relevant Government Departments
Facilitate ease of doing business to ensure growth of the tourism economy	Investigate how and where the regulatory environment for tourism businesses could be simplified, and develop a programme to work with the relevant authorities at all levels, with particular focus on relieving the regulatory burden on SMMEs	Lead: Department of Tourism Contributing Partners: Provincial and Local Government, TBCSA, Tourism SMMEs, Department of Small Business Development and other relevant Departments

7.3 Visitor Experience

Outcome Statement:

Provide quality visitor experiences for tourists (both domestic and international) to achieve customer satisfaction and inspire repeat visitation.

- Enhancements to tangible and intangible elements of the visitor experience;
- Upgrade experiences at World Heritage Sites;
- Enhance local destinations through cleanliness, aesthetics, and information improvements;
- Provide tourism experiences and facilities that cater for domestic market segments;
- Increase bandwidth to support tourism;
- Enhance tourist safety and support;
- Facilitate tourist travel through improved private and public transport for tourists;
- Improve tourism skills and service excellence.



7.3 Visitor Experience Cont..

OBJECTIVE	ACTIONS	PARTNERS
Diversify and enhance tourism product offerings	Investigate and develop tourism niche market products with the highest ability to attract more travelers in line with the competitiveness of a locality e.g. marine and coastal tourism, science tourism, adventure tourism etc.	Lead: Provincial Departments and Department of Tourism Contributing Partners: SA Tourism, TBCSA, Provincial Tourism Marketing Agencies, Local Government and relevant Government Departments
Improve major sites: Upgrade experiences at World and National Heritage Sites as well as National and Provincial and Municipal Parks	Work with WHS, National Heritage Sites as well as Provincial Parks to improve the visitor experience through infrastructure provision, training and systems development.	Lead: Department of Tourism Contributing Partners: WHS and National Heritage Sites as well as their custodian departments, Provincial and Local Government where appropriate and Local tourism industry where appropriate



7.3 Visitor Experience Cont..

OBJECTIVE	ACTIONS	PARTNERS
<p>Enhance local destination sites through cleanliness, safety and security, aesthetics, and information improvements</p>	<p>Implement a public employment programme for tourism that has a number of focus areas, starting with Blue Flag beaches and a focus on marine and coastal tourism.</p> <p>Ensure alignment of the Expanded Public Works Programme (EPWP) goals with local economic needs to ensure sustainability of employment.</p>	<p>Lead: Department of Tourism</p> <p>Contributing Partners: Programme Implementers, Site Partners and Local Government</p>
<p>Provide tourism experiences and facilities that cater for the domestic market segments</p>	<p>Expand on the lessons learnt on the viability of government partnering with industry/private sector to undertake the effective management and marketing of underutilised state owned tourist facilities such as resorts, campsites, etc. and develop a viable model.</p>	<p>Lead: Department of Tourism</p> <p>Contributing Partners: Provincial Departments, Local Government, TBCSA (particularly experienced black entrepreneurs) and Development Finance Institutions (DFIs)</p>

7.3 Visitor Experience Cont..

OBJECTIVE	ACTIONS	PARTNERS
<p>Provide tourism experiences and facilities that cater to domestic market segments</p>	<p>Identify State owned assets suitable for lower LSM holiday travel and, develop and implement a turnaround strategy.</p>	<p>Lead: Department of Tourism and DEA</p> <p>Contributing Partners: Provincial Departments, Local Government, TBCSA and DFIs</p>
<p>Increase bandwidth to support the activities of tourists and tourism businesses</p>	<p>Determine and communicate the tourism industry's Wi-Fi needs by region, and motivate that this be prioritised within national, provincial and local plans.</p> <p>Facilitate the development of Wi-Fi access in key visitor precincts, World Heritage Sites (WHS), other iconic sites and gateways.</p>	<p>Lead: Department of Tourism</p> <p>Contributing Partners: Relevant Government Departments and Agencies, Provincial Departments, Local Government and TBCSA</p>



7.3 Visitor Experience Cont..

OBJECTIVE	ACTIONS	PARTNERS
Enhance tourist safety and ensure effective responses to incidents of crimes against tourists	Review and revitalise tourism safety programmes including the enhancement/expansion the Tourism Safety Initiative as required.	Lead: Department of Tourism Contributing Partners: SAPS, Provincial Departments, Local Government and TBCSA
	Facilitate the development of a cadre of safety officers in the tourism sector who are able to address safety issues across varying contexts including crime protection and safety. This would be managed through the TSHRDS.	Lead: Department of Tourism Contributing Partners: SAPS, Provincial Departments, Local Government and TBCSA
Facilitate tourist travel through improved private and public transport for tourists	<p>Identify actions to support tourist travel and industry performance. Set up a Tourism and Transport Forum.</p> <p>Engage directly with the National Master Action Plan for Transportation Committee, to ensure the inclusion of tourism needs.</p>	Lead: Department of Tourism Contributing Partners: TBCSA (SATSA, SAVRALA, AASA - with regards to domestic air carriers, coach and bus operators), Private rail operators and Passenger Rail Agency of South Africa (PRASA)

7.3 Visitor Experience Cont..

OBJECTIVE	ACTIONS	PARTNERS
Improve tourism skills and service excellence	Ratify and implement a multi-stakeholder response to the implementation of the recommendations of the TSHRD framework.	Lead: Department of Tourism Contributing Partners: CATHSSETA, DBE, DHET, Educational Institutions and TBCSA
	Investigate the potential for the professionalisation of specific tourism occupations and trades. Specific occupations recommended include Chefs, Executive Managers, Professional Conference Managers and Tour Operators.	Lead: Department of Tourism Contributing Partners: CATHSSETA, Research Institutions, Educational Institutions and TBCSA
	Develop and implement an agreed Code of Conduct and Service Charter along the activity / value chain.	Lead: TBCSA Contributing Partners: Associations within the tourism value chain and Department of Tourism

7.3 Visitor Experience Cont..

OBJECTIVE	ACTIONS	PARTNERS
Improve tourism skills and service excellence	<p>Assess the usefulness and appropriateness of tourism as a high school subject arising from the Skills Review Study and implement recommendations contained therein.</p> <p>Facilitate engagement with Department of Basic Education (DBE) on the findings of the Skills Audit in respect of Tourism training at high school level in order to respond to the key findings.</p>	<p>Lead: Department of Tourism</p> <p>Contributing Partners: DBE, TBCSA, Educational Institutions and CATHSSETA</p>



7.4 Destination Management

Outcome Statement:

To provide for sustainable development and management of the tourism sector.

- Activities and relationships critical to destination competitiveness;
- Improve the focus and delivery of tourism marketing and development support provided by provinces and local government;
- Improve the quality of decision making, planning evaluation and monitoring in tourism;
- Improve understanding of and enhance support for tourism across national government departments;
- Introduce best practice approaches and risk management tools to enhance industry's performance.



7.4 Destination Management Cont..

OBJECTIVE	ACTIONS	PARTNERS
Improve the focus and delivery of tourism marketing and development support provided by Provinces and Local Government.	<p>Develop clear proposals and guidelines to be formally adopted on best practice, roles and responsibilities in tourism marketing and development across the spheres of Government.</p>	<p>Lead: SA Tourism and Department of Tourism</p>
	<p>Strengthen relationships between national, provincial, district and local tourism organisations to maximise product development and marketing that reinforces product differentiation and meet visitor demand.</p>	<p>Contributing Partners: Provincial Departments, Local Government, COGTA and relevant Marketing Agencies</p>
	<p>Build capacity of Provinces and Local Government in specific areas within confirmed definition of roles and responsibilities linked to priorities in the NTSS.</p> <p>Assess the current capacity as well as the required competencies to fulfil these roles as a necessary precursor to the design of a capacity development programme. This will be disaggregated for different tiers of Government officials.</p>	<p>Lead: Department of Tourism</p> <p>Contributing Partners: COGTA, Educational institutions, Provincial Government and Local Government.</p>



7.4 Destination Management Cont..

OBJECTIVE	ACTIONS	PARTNERS
Improve the focus and delivery of tourism marketing and development support provided by provinces and local government.	Review Spatial Development Initiatives (SDI's), priority areas for tourism infrastructure investment and provincial plans to develop products and experiences that would improve the current offerings.	Lead: Local Government Contributing Partners: Provincial Departments and COGTA
Improve the quality of decision making, planning, monitoring and evaluation in tourism	Develop and implement a Tourism Performance Dashboard based on current sources of data. Also develop a competent predictive model and explore inclusion of the visitor economy concept which can forecast macroeconomic tourism performance.	Lead: Department of Tourism Contributing Partners: SA Tourism, TBCSA and StatsSA
	Determine and implement international best practice for national tourism information systems based on brief of stakeholder information needs and scope for implementation.	

7.4 Destination Management Cont..

OBJECTIVE	ACTIONS	PARTNERS
Improve understanding of, and enhance support for tourism across national government	Develop and communicate the socio-economic case for tourism as an effective briefing tool for senior officials and Ministers.	Lead: Department of Tourism Contributing Partners: TBCSA, SA Tourism and Provincial Departments
Introduce best practice approaches and risk management tools to enhance the sector's performance	Finalise the policy review of the Tourism Grading Council of South Africa (TGCSA) and introduce a new business model.	Lead: SA Tourism (TGCSA) Contributing Partners: Department of Tourism, TBCSA and Provincial Departments
	Develop and implement a national web-based tourism feedback system to gather customer satisfaction information. Monitor industry and consumer satisfaction to inform enhancements to the grading system. Integrate research about customer satisfaction into one common platform or database.	Lead: SA Tourism (TGCSA) Contributing Partners: Department of Tourism, TBCSA and Provincial Departments

7.4 Destination Management Cont..

OBJECTIVE	ACTIONS	PARTNERS
<p>Introduce best practice approaches and risk management tools to enhance the sector's performance</p>	<p>Identify areas in which additional, specific standards or guidelines are required through industry engagement. As necessary, research and introduce new standards (voluntary or compulsory) or guidelines.</p> <p>Monitoring of global developments through conducting desktop research and international work-study visits.</p> <p>Desktop criteria for the grading of high risk sectors, e.g. adventure tourism.</p>	<p>Lead: SA Tourism (TGCSA)</p> <p>Contributing Partners: Department of Tourism, TBCSA, Provincial Departments and SABS</p>
	<p>Provide information on technologies and resources for the expansion of resource-efficient infrastructure and operational practices as there are opportunities in new builds and retrofitting to support industry's implementation of responsible tourism.</p>	<p>Lead: Department of Tourism</p> <p>Contributing Partners: DEA, TBCSA, National Cleaner Production Centre, The Green Fund, Other relevant entities focused on the green economy, renewable energy and waste management</p>

7.4 Destination Management Cont..

OBJECTIVE	ACTIONS	PARTNERS
Introduce best practice approaches and risk management tools to enhance industry's performance	Expand universal access within the value chain starting with major attractions.	Lead: Department of Tourism Contributing Partners: TGCSA, TBCSA and Provincial Departments
	Develop a supply side database to understand supply and demand factors for effective planning and monitoring of performance.	Lead: Department of Tourism Contributing Partners: TBCSA, Provincial Departments and Local Government



7.5 Broad Based Benefits

Outcome Statement:

Promote the empowerment of previously marginalised enterprises and rural communities to ensure inclusive growth of the sector.

- Strengthen the realisation of broad based benefits from tourism across the value chain;
- Achieve Broad Based Black Economic Empowerment (B-BBEE) targets;
- Support sustainable Enterprise development;
- Expand benefits of tourism to rural areas.



7.5 Broad Based Benefits Cont...

OBJECTIVE	ACTIONS	PARTNERS
Achieve Broad Based Economic Empowerment (B-BBEE) targets	Develop a range of proposals for inclusive growth across the tourism value chain and implement the recommended and agreed upon actions.	Lead: Department of Tourism Contributing Partners: Tourism BEE Council and Private Sector (Procurement Managers of large and medium tourism firms)
Support sustainable Enterprise Development	Review lessons learned from Tourism Enterprise Partnership (TEP) and other enterprise development initiatives and develop a set of proposals on training, mentorship, up-skilling financing and investment.	Lead: Department of Tourism Contributing Partners: Enterprise development agencies and DFIs

7.5 Broad Based Benefits Cont...

OBJECTIVE	ACTIONS	PARTNERS
Support sustainable Enterprise Development	<p>Design and implement an improved tourism enterprise development programme including for suppliers into tourism businesses.</p> <p>Undertake an assessment of the role and contribution of other State institutions whose core mandate is to promote SMME development.</p>	<p>Lead: Department of Tourism</p> <p>Contributing Partners: Department of Small Business Development, Tourism BEE Council</p>
Expand benefits of tourism to rural areas and townships	<p>Review the Rural Tourism Development Strategy and benchmark this against other strategies. Link this to the transformation and community beneficiation agenda with a particular focus on the factors necessary to create a conducive environment for rural and township tourism development.</p>	<p>Lead: Department of Tourism</p> <p>Contributing Partners: SANParks, Private Sector (representatives that are experienced in operating concessions with communities), DRDLR, DEA, DAC, Provincial Departments, Local Government and Local Community</p>



7.5 Broad Based Benefits Cont...

OBJECTIVE	ACTIONS	PARTNERS
Expand benefits of tourism to rural areas	Review investments that have been made into tourism facilities in rural areas and townships to date to determine facilities that are / are not operational and success factors. This will provide a useful guideline for future investment into similar initiatives.	Lead: Department of Tourism Contributing Partners: Provincial Departments, Local Government, Private Sector, Investment Agencies and DRDLR
	Develop and implement strategies of enabling rural and township stakeholders to access capacity development, training and mentoring opportunities. Review the supply of skills training for rural and township stakeholders.	Lead: Department of Tourism Contributing Partners: CATHSSETA, DRDLR, Provincial Departments and Local Government



8. Critical Process and Support Issues for NTSS Implementation

Tourism is about relationships. There is a need for major improvements in the effective working relationships in three specific areas:

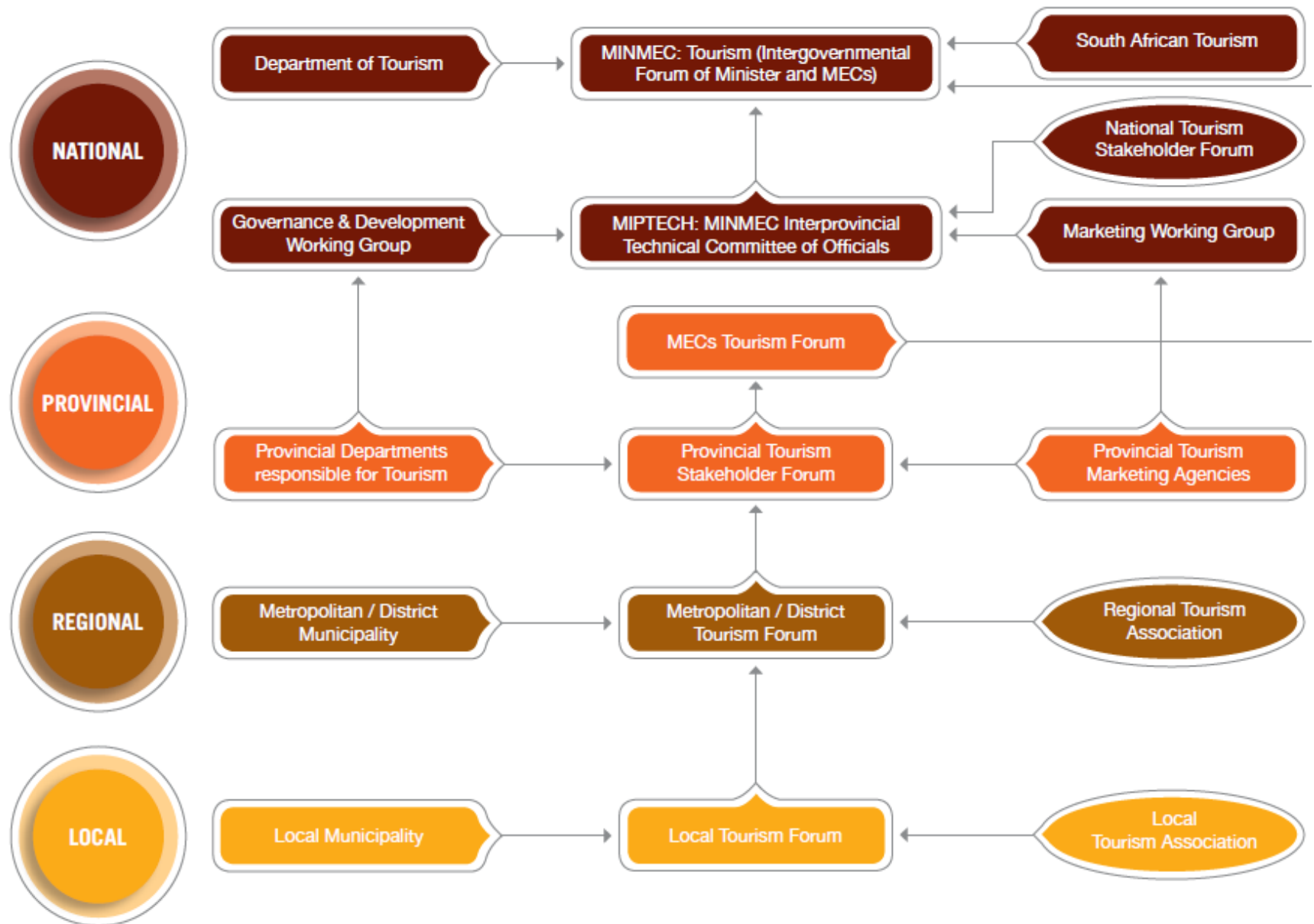
Public and Private Sector Relationship	Centred on planning for marketing, branding, skills development and transformation programmes. There needs to be practical and effective consultation and measurement with agreed deliverables in this relationship. The relationship needs to be more transparent and effective than it is currently perceived to be.
Government to Government Relations	Focus on barrier removal and enhanced alignment. Inter-Ministerial collaboration is essential on issues which impact significantly on NTSS implementation.
Relationship Between Tourism Agencies and Cities	focused on goals and targets for destination marketing implemented by National, Provincial and Local agencies. This is needed to ensure full support for the priorities in this NTSS, and, in particular, for the effective and efficient use of state funds and budgets for tourism marketing to both international and domestic tourists.

9. Institutional Mechanisms

- Successful implementation of the revised NTSS is depended on the commitment of all stakeholders to adopt an integrated approach in implementing the identified priorities and actions.
- This requires effective governance structures and processes at national, provincial and local level to manage and support tourism.
- Institutional structures create a platform to facilitate stakeholder engagement, planning and collaboration to advance national tourism objectives and NTSS implementation.
- Institutional arrangements outline structures pertaining to the coordination of tourism activities between the different spheres of government; and between public and private sectors.
- The Department of Tourism leads coordination at national level whilst Provinces are responsible for coordination at a provincial level; and to provide support the establishment of district/local structures.
- Local Government must designate resources to enable proper coordination at that level.
- Relevant stakeholders are to agree on the modalities to realise the effective coordination of the institutional arrangements taking into cognisance local dynamics.



9. Institutional Mechanisms cont..



9.1 National Coordinating Structures

STRUCTURES	DESCRIPTION
MINMEC	The intergovernmental tourism forum of the Minister of Tourism and the provincial MECs for Tourism. MINMEC discusses and agrees on national tourism policy matters.
MIPTECH	The MINMEC Interprovincial Technical Committee (MIPTECH) on tourism is an intergovernmental forum of national government officials, heads of provincial departments, SALGA, and CEOs of tourism marketing agencies. MIPTECH coordinates provincial and national tourism affairs in preparation for and support to MINMEC.
Tourism Working Groups <i>(Development, governance and marketing)</i>	Intergovernmental structure which deals with governance, planning, development and marketing issues to ensure alignment, coordination and collaboration across the three spheres of Government. Governance, planning and development issues are coordinated by Department of Tourism, whilst marketing issues are coordinated by SA Tourism. The Working Groups consider and recommend relevant matters to MIPTECH.
National Tourism Stakeholders Forum (NTSF)	A tourism multi-stakeholder Forum coordinated by Department of Tourism and attended by private and public sector stakeholders to deliberate on strategic and topical issues that impact on tourism including the implementation of the NTSS.

9.2 Provincial Coordinating Structures

STRUCTURES	DESCRIPTION
MEC Tourism Forum	<p>Tourism Committee of Provincial MECs and District mayors, CEOs of Provincial Tourism Marketing Agencies, CEOs of other relevant entities and SALGA to discuss and agree on cooperative tourism programmes and strategies.</p> <p>The MECs should be informed about provincial tourism priorities, interests and challenges which require national attention for consideration and discussion by MINMEC.</p>
Provincial Tourism Stakeholder Forum	<p>Provincial multi-stakeholder Forum coordinated and attended by private and public sector stakeholders to deliberate on cross-cutting issues pertaining to planning, development marketing and investment. The Forum considers and recommends relevant matters to the MECs' Tourism Forum. This includes deliberations on strategic and topical issues that impact on tourism as well as the implementation of provincial tourism plans (aligned to the NTSS).</p>



9.3 Local Coordinating Structures

STRUCTURES	DESCRIPTION
District Local Tourism Forums /	<p>A multi-stakeholder forum chaired by the Executive Mayor or the Chairperson of the Tourism/Economic Development Portfolio and attended by Local Mayors or Chairpersons of the Tourism Portfolio.</p> <p>Participation should also include officials, the Executive Committee of the Regional Tourism Association (to represent private sector interests) and other relevant regional entities provincial tourism departments as well as the provincial marketing agencies.</p> <p>The Forum shall deliberate and determine priorities to support tourism growth and development in the region, facilitate cooperation and alignment with provincial tourism development priorities; and confer relevant issues for consideration by the MECs' Forum.</p>
Regional and Local Tourism Associations	<p>A Regional Tourism Association constituted by tourism business operators to organise and represent the interests of the private sector. Depending on the local dynamics as not all the local municipalities have equal tourism strength and potential, the local tourism businesses may affiliate directly to the Regional Tourism Association. The Associations must keep an updated database of all tourism service providers (affiliated members) for each region and locality.</p>



10. NTSS Implementation, Monitoring and Reporting Mechanism

The Department of Tourism leads, monitor and report on the implementation of the NTSS through the following mechanisms.

MECHANISM	DESCRIPTION
NTSS Implementation Work Streams	The NTSS Implementation Work Streams are aligned to five strategic pillars of the NTSS. The Work Streams are aimed at facilitating prioritised actions for implementation of the NTSS.
National Tourism Stakeholders Forum	The NTSF is a multi-stakeholder platform aimed at facilitating discussions and engagement on matters of strategic importance affecting the travel and tourism industry in the country. The Forum is chaired by the Director-General (DG) of the Department of Tourism, and attended by senior executives from both private and public sectors to deliberate on inter alia, key policy issues, international and local trends and key developments within the context of the implementation of the NTSS.
Annual NTSS Implementation Report	The Department monitors the implementation of the NTSS through the development of the Annual NTSS Implementation Report. The report provides quantitative and qualitative analysis of the sector performance and tracks progress against the achievement of NTSS targets.

II. Performance Against NTSS Targets

When the NTSS was revised in 2015, indicators and targets were based on the November 2016 WTTC projections. Therefore, the analysis of the tourism sector's performance in respect of the economic indicators and targets is underpinned by the WTTC estimates

Indicator	2015 Baseline	2018 Target	2018 Performance <i>(WTTC 2018 estimates)</i>
Direct contribution to GDP	111.638	149.157	139.0bn
Total contribution to GDP	375.502	467.154	425.5bn
Direct employment	702.824	754.356	687.500
Total employment	1554.2	1638.38	1499.500
Visitor Exports	114.957	148.806	128.3bn
Capital investments	63.6617	78.3085	76.8bn



I 2. List of Acronyms

Acronym	Full Name
AASA	Airline Association of Southern Africa
ACSA	Airports Company of South Africa
ATCP	Accredited Travel Company Programme
B-BBEE	Broad-Based Black Economic Empowerment
Brand SA	Brand South Africa
CATHSSETA	Culture, Arts, Tourism, Hospitality, Sport Sector Education and Training Authority
CEO	Chief Executive Officer
COGTA	Cooperative Governance and Traditional Affairs
DAC	Department of Arts and Culture
DBE	Department of Basic Education
DEA	Department of Environmental Affairs
DFI	Development Finance Institution
DG	Director-General
DHA	Department of Home Affairs
DHET	Department of Higher Education and Training
DIRCO	Department of International Relations and Cooperation
DoT	Department of Transport
DRDLR	Department of Rural Development and Land Reform

I 2. List of Acronyms Cont...

Acronym	Full Name
EPWP	Expanded Public Works Programme
ESEID	Economic Sectors Employment and Infrastructure Development
GCIS	Government Communications Information System
GDP	Gross Domestic Product
IAB	Immigration Advisory Board
LSM	Living Standard Measure
MEC	Member of Executive Council
MTSF	Medium Term Strategic Framework
NDP	National Development Plan
NTSF	National Tourism Stakeholders Froum
NTSS	National Tourism Sector Strategy
PPGI	Public Private Growth Initiative
PRASA	Passenger Rail Agency of South Africa
SA	South Africa
SA Tourism	South African Tourism
SATSA	South African Travel Services Association
SABS	South African Bureau of Standards

I 2. List of Acronyms Cont..

ACRONYM	FULL NAME
SALGA	South African Local Government Association
SANParks	South African National Parks
SAVRALA	South African Vehicle Rental and Leasing Association
SDI	Spatial Development Initiative
SMMEs	Small Medium Micro Enterprises
SONA	State of the Nation Address
SPC	Strategy Planning Committee
Stats SA	Statistics South Africa
TBCSA	Tourism Business Council of South Africa
TEP	Tourism Enterprise Partnership
TGCSA	Tourism Grading Council of South Africa
TSHRD	Tourism Sector Human Resource Development
TSHRDS	Tourism Sector Human Resource Development Strategy
UA	Universal Access
USA	United States of America
WHS	World Heritage Site
WTTC	World Travel and Tourism Council



The End

Thank You!

