

Bojanala

Collectively and Broadly Promoting Responsible and Sustainable Tourism for Benefit of All

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- Reflections on Achievements of the Tourism Sector and Priorities Set for the Road Ahead in 2013: Tourism Budget Vote



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ABOUT THE COVER



The cover depicts a picture of a section of the Heritage and Culture Pavilion that was put together during the 2013 Tourism INDABA. The primary objective of the Heritage and Culture Pavilion was to profile and promote the World Heritage Sites in South Africa as globally competitive destinations. Picture courtesy of South African Tourism.

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LETTER FROM THE EDITOR

Greetings and welcome to another edition of Bojanala...

In line with the renewed vibrancy we are experiencing in the tourism sector, Bojanala team has revamped the look and feel of our publication. This edition is coming at a time when the tourism sector in the country is gripped with euphoria from the phenomenal international tourist arrival statistics in 2012. National Department of Tourism (NDT) felt honoured and was heartened to have the President of the Republic of South Africa, Mr Jacob Zuma taking time off his busy schedule to launch the statistics at the V&A Waterfront on the 25th of April 2013. The tourism sector is revelling in the remarkable success of the sector, which saw South Africa recording 9 188 368 international tourists in 2012, a massive 10.2% rise from the 8 339 354 tourists in 2011 and more significantly double the global average of 4% growth estimated by the United Nations World Tourism Organization. In this edition we cast our focus on the launch of the arrival statistics by President Zuma in the article "Working Together in Positioning Tourism as a National Growth Driver in the South African Economy".

The year's Tourism Indaba revolved around Heritage and Cultural Tourism and this is subject for an article in this edition. This focus came through the Heritage and Culture Pavilion and other events at the Indaba 2013. The pavilion showcased the wealth of lifestyle and cultural experiences that South Africa offers and it gave a rich peek into the soul of destination South Africa. The pavilion was complemented in terms of showcasing the rich heritage and culture of destination South Africa through the virtuoso

performance by Vusi Mahlasela and the presentation of a DVD on heritage and cultural activities at South Africa's World Heritage Sites, at the official opening of Indaba 2013.

Of late there have been concerns about the readiness of tourism and hospitality graduates to enter and thrive in the workplace, as well as the dwindling numbers of learners studying hospitality and tourism at tertiary level over the years. There have also been questions about the quality of the tourism and hospitality curricula and the resultant qualifications. Umalusi was commissioned to evaluate the tourism and hospitality programme

"The year's Tourism Indaba revolved around Heritage and Cultural Tourism..."

and this resulted in a report: *"At your service – Towards an informed understanding of the NC (V) Tourism and Hospitality programmes"*. In this edition we provide an overview of the report in terms of the background, the role of the NDT; the methodology; the key findings and recommendations.

On the 14th of May 2013, Minister Marthinus van Schalkwyk delivered his budget speech to the National Assembly. In this edition, we cast our microscope on this momentous occasion in which he took time to reflect on the year 2012 and also chart the way forward for this financial year. The Minister started by celebrating the phenomenal 2012 International Tourist Arrival Figures and then outlined plans for 2013, which include plans to enhance the status of South Africa as a tourist destination; to boost domestic tourism; to promote

regional tourism; to enhance further education and training; and to enhance transformation on the sector. The Minister, in a speech well received by both sides of the house, also took time to reflect on the contribution of the tourism sector to the economy and that of the National Department of Tourism (NDT) to the Expanded Public Works Programme (EPWP).

In line with the National Tourism Sector Strategy, which identified research as a critical area in the development and growth of the tourism sector, NDT signed an MOU with five universities to boost research in tourism

related matter. NDT hosted a colloquium for the universities and other stakeholders to share and discuss their research findings and in this edition; we provide an overview on the colloquium, where three research studies conducted in collaboration with the University of Pretoria and Zululand were presented.

As a parting shot, allow me to call on the tourism sector to continue shining and polishing the "new gold" as we continue gunning for the Top 20 by 2020 as per the National Tourism Sector Strategy.

Enjoy your edition of Bojanala!



EDITOR

Tourism Enterprise Partnership Hosts a Workshop for Small Tourism Businesses in South Africa During Tourism Indaba 2013



Tourism Enterprise Partnership (TEP) is a flagship public-private partnership that has been facilitating job creation and enterprise development in the tourism industry in South Africa for the past 13 years. Initially launched by the Business Trust in July 2000, TEP has been delivering job creation, skills development and market access targets on behalf of the National Department of Tourism (NDT) for the past 10 years. As a Non-Profit Company (NPC), TEP utilises funding from NDT and private sector corporate companies to facilitate the growth, development and sustainability of small tourism businesses in

South Africa. Private sector partners include Rennies, Thebe Tourism, Gooderson Leisure, Springbok Atlas, Royal Bafokeng Platinum Mining, Credit Suisse, etc.

TEP offers tourism SMMEs access to information, funding, skills and markets. Ultimately these services lead to a better

TEP is a Non-Profit Company established to assist in delivering job creation, skills development and market access to small tourism businesses in SA.

quality product with adequate skills and an increased market share. TEP has closely aligned its objectives and outcomes with both the National Development Plan and the National Tourism Sector Strategy.

Since 2000 TEP has supported small tourism businesses to expand and improve business operations, leading to them creating over 70,000 jobs in the tourism industry and increasing turnover by R5,6 billion. TEP is a Non-Profit Company (NPC), which utilises funding from Corporate South Africa and Government (NDT) to facilitate the growth, development and sustainability of small tourism businesses in South Africa. TEP has developed

unique enterprise development services that support small businesses to address some of the main challenges they face such as access to information, funding, skills and markets.

TEP annually hosts one of the largest gatherings of small tourism businesses in South Africa with the SMME Workshop hosted

during Tourism Indaba in Durban. With three main focus areas, the workshop this year has certainly been the best one yet, providing strategy updates from national tourism bodies, skills transfer in the form of a story telling lecture and the highlight of the day being the announcement of the nine Provincial ETEYA Finalists.

Over 360 small and medium tourism businesses and stakeholders from all across South Africa participated in the TEP Annual SMME Workshop, which was held at the Durban ICC on Friday, 10 May 2013.

During the workshop South African Tourism

transcended the volumes of research statistics into an insightful presentation that demonstrated to small businesses how research information could be used to directly add value to a business. Domestic tourism, as a focus area in the National Tourism Sector Strategy, can be accessed by small tourism businesses through addressing the specific needs of the segments. The key lessons were to identify the segments that are relevant to the business, focus marketing efforts, clarify the message, build a community of other tourism products to add value to your visitor and focus on events and special packages.

Platforms have been created to assist small businesses with information gathering and marketing efforts such as the VayaMzansi website and Facebook page (www.vayamzansi.co.za).

The Tourism Grading Council of South Africa announced its new user-friendly website aimed at making life simpler for those wishing to go



through the grading process. It offers practical information and advice on how to get graded

VayaMzansi website (www.vayamzansi.co.za) assist small tourism businesses with information gathering and marketing efforts.

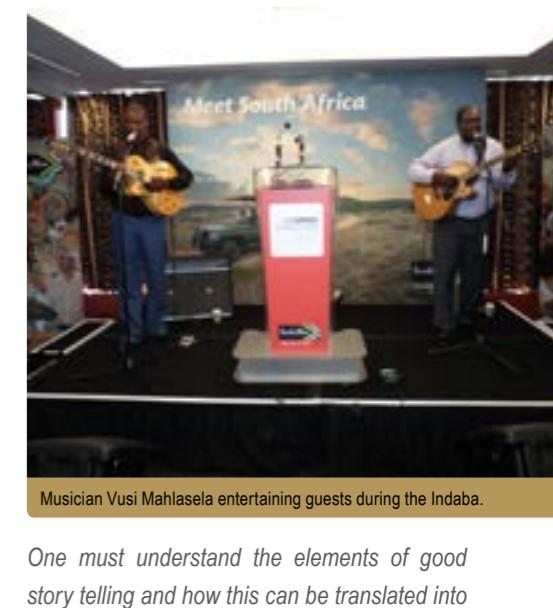
and has a brand new self-assessment tool to assist tourism businesses to gauge their potential outcome prior to the grading process. The site also has video clips to demonstrate the expected levels of compliance and includes a process that can be followed to appeal, if necessary, the star grading achieved.

National Department of Tourism gave an overview of the Service Excellence Standards and its public-private-partnership through the established Forum. The Service Excellence Heroes Programme was announced as well as the self-assessment tool that was created for



tourism businesses to score their organisations on service levels.

Big Chief Talking Bull, aka Peter Christie, presented a most interesting lecture on how businesses can differentiate themselves through story-telling, and he said: "Stories are not presentations, stories are not arguments.



One must understand the elements of good story telling and how this can be translated into the visitors' experience. A good story has a beginning, the top, and it has an ending, the tail. One must make sure that there is a powerful start so that the consumer is captured and then a happy ending to ensure return guests. Whilst the tourist is on holiday (the location/setting of the story) they will encounter the characters of the stories and the plot – the wide variety of activities and experiences on offer. So, what is the story that we as South Africans are telling our tourists? It is important to embody our culture, our history and our heritage into our story to ensure that South Africa is differentiated on the world stage".



Delegates packed the hall for the TEP annual SMME Workshop at the Indaba.



Walk-about by Indaba delegates.

NDT Hosts a Research Colloquium



Introduction and background

The economic and social benefits of tourism have been widely accepted world-wide and this is evident in tourism's positioning as one of the key sectors in the economic development strategies. In South Africa, tourism is identified in the government's New Growth Path economic strategy as one of six key job-driving sectors, along with mining, manufacturing, the green economy, infrastructure development and agriculture. In order to ensure that tourism is positioned to yield the desired economic and social benefits in South Africa, there is a need for consistent



rigorous research to ensure that the money-making potential of the industry is achieved. Without regular comprehensive research the positive potentials and negative threats of tourism will not be identified.

Where is all this coming from?

To address the challenge of capacity, the National Department of Tourism (NDT) signed Memoranda of Understanding (MOUs) for a four year period with five universities in order to foster collaboration and strengthening capacity in the realm of skills development and tourism research. NDT has made funds available to provide financial assistance to a number of postgraduate students pursuing tourism-related research studies. In the research area, the MoUs establish a formal basis of cooperation in support of collaboration on research projects identified in the NTSS. In 2012, NDT approved six research themes to be conducted in collaboration with the universities and these include:

- University of Johannesburg (UJ) - Service Excellence
- University of Venda (UNIVEN) - Rural Tourism Routes
- University of Zululand (UniZULU) - Sport Tourism
- Cape Peninsula University of Technology (CPUT)- Business Events Tourism
- University of Pretoria (UP) - Tourism Management Division of the Department of Marketing Management: Niche Product Development
- University of Pretoria (UP) - Department of Historical and Heritage Studies: Cross-border tourism and guiding

Research outputs of these studies were quality assured by the Research Policy Expert Forum, a panel appointed by Minister to create a peer review platform for the NDT in order to ensure credibility of the research information. To ensure that the research findings are useful

and Zululand were presented during the colloquium, namely;

- analysis of the supply of tourism products for the five key domestic market segments (University of Pretoria: Tourism Management Division of the Department of Marketing

The word 'colloquium' is defined in the Encarta English Dictionary to mean an academic conference or seminar in which a particular topic is discussed, often with guest speakers.

to addressing the needs of stakeholders in the sector, the NDT convened a Research Colloquium on the 12th of March 2013 in Boksburg, Gauteng Province. The aim of the colloquium was to create an interactive platform for the universities to disseminate and discuss the findings of the research studies and to obtain constructive feedback from key stakeholders and researchers in the sector. In addition, the research colloquium was also a platform for best practice, knowledge sharing and future research collaborations. The colloquium brought together experts in tourism, hospitality, transport and development studies and included scholars, researchers and representatives from both public and private sector.

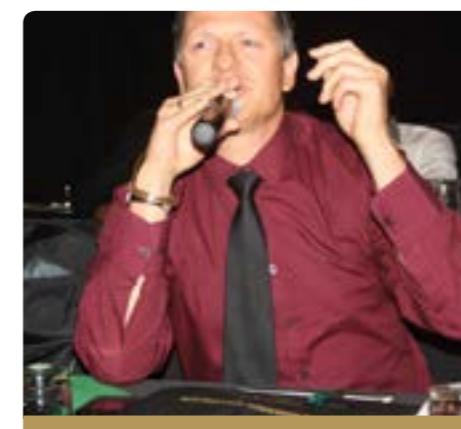
The Tourism Research Colloquium

The colloquium took the structure of presentations of the research studies that shared information on the research methods employed in the studies, data collection processes and the findings and recommendations generated from the studies. Presentations were then followed by high-level overview by an appointed discussant providing perspectives on the topic under discussion based on personal experience, knowledge and expertise. The questions, answers and discussions then followed, and concluded sessions on the different research topics.

Three research studies conducted in collaboration with the Universities of Pretoria

Management);

- understanding the concept of cross-border tourism and guiding in Southern Africa (University of Pretoria: Department of Historical and Heritage Studies); and



Prof Melville Saayman of UNW during the colloquium.

facilities, food and beverage services, attractions, transport services, events, packages and tours and activities/special interest offerings as key product categories. Four tourism nodes were selected in different provinces and these were the Central Karoo, West Coast, Bushbuckridge and OR Tambo regions/nodes. The study collected information and data through a mixed method approach using both quantitative and qualitative techniques. Qualitative interviews were conducted with key industry stakeholders in these nodes. The study was led by Prof Berendien Lubbe from the Tourism Management Division of UP.

The results showed that in each of the four nodes the ability of the current product offering to meet the needs of the five segments differed,



Mr Khumbu Sithole of Gauteng Tourism Authority at the colloquium.

and suggestions specific to each market and node were made to address this.

Additional issues that emanated from the discussant and the colloquium delegates further emphasised the fact that there is a need to understand the needs of each market and provide tourism goods and services that will satisfy the needs of these market segments if a particular segment is to be developed comprehensively. For example, understanding the needs of older people and people with disabilities, and building that in the market segment will ensure that tourists get value for their money (which is what tourists repeatedly desire to get) in those designated tourist groups.

Understanding the concept of cross-border tourism and guiding in southern Africa

This research on cross-border guiding was conducted with the aim of creating an understanding of cross-border tourism and guiding in southern Africa so as to make recommendations on a harmonised regulatory and training framework for this form of guiding in southern Africa specifically in the southern-most region of the Southern African Development Community (SADC) countries of Botswana, Lesotho, Mozambique, Namibia, South Africa and Zimbabwe.



Researchers from UP and UniZulu during the colloquium.

The research was undertaken by the Department of Historical and Heritage Studies under the leadership of Prof Karen Harris. Members of the Department of Anthropology and Archaeology at UP were also involved in the study.

The research study focused on the current state of tourism in the southern African region by reviewing aspects such as visa requirements and work permits, the UNIVISA system, regional tourism development, and the general state of tourism in the region. Tourism legislation and policies of each of the SADC countries involved were also investigated. Furthermore, the concept of tourist guiding, including training programmes, skills development and accreditation systems used across the region was also examined.

The study established that a number of gaps existed to allow for smooth cross-border tourist guiding in the SADC countries. This was established to be in part due to challenges associated with visa requirements and lack of uniform accredited tourist guiding training across the region. Discussions at the colloquium placed emphasis on the significance of training in tourist guiding and standardisation of the training and registration processes of tourist guides in the different southern African countries. Delegates also added that the lack

narrative, or conceptual analysis. The study was undertaken by the Department of Recreation and Tourism of the University of Zululand. Leading the research team were Profs A.T. Nzama and L.M. Magi, as well as Dr. N.R. Ngcobo.



Prof A Nzama of UniZulu receiving a memorabilia from Mr B Meyer of NDT.

The study revealed that local communities perceived the routes as inadequately benefiting them towards achieving a better livelihood in the area. It was also established that communities adjacent to the tourism routes were relatively unaware of the routes themselves. This thus suggested that there was limited community beneficiation and tourism development in the area as a result of the tourism routes.

Delegates' discussions pointed out that the issue relating to community awareness about the routes and their development was central to ensuring that benefits derived from these routes accrue to communities. Clearly defined marketing initiatives of the routes were also highlighted as requiring attention.

In closing, NDT has identified the key ingredients in delivering on their mandate, and also took stock of their capacities. In the cases of gaps in capacities, critical partnerships have been established to enhance delivery of tourism development. The partnerships established above provided a platform for best practices, knowledge sharing and future research collaborations that would guide legislative and policy reviews, and identify key priority areas towards improving tourism performance in the country.

Reflections on Achievements of the Tourism Sector and Priorities Set for the Road Ahead in 2013: Tourism Budget Vote



Minister of Tourism, Mr Marthinus van Schalkwyk, delivered his 2013 budget speech to the National Assembly on the 14th of May 2013. In his speech he took time to reflect on the year 2012 and also chart the way forward for this financial year.

The budget speech started on a celebratory note with the Minister reflecting on the 2012 International Tourist Arrival Figures before the Minister went on to outline plans for 2013 such as plans to enhance the status of South Africa as a tourist destination; to boost domestic tourism; to promote regional tourism; to enhance further education and training; and to enhance transformation in the sector. The Minister also took time to reflect on the contribution of the tourism sector to the economy and that of the National Department of Tourism (NDT) to the Expanded Public Works Programme (EPWP).

Growth in international tourist arrivals

The Minister picked up from where the President left off at the Annual Tourism Statistics launch on the 25th of April 2013 (see article on arrival statistics in this edition) by continuing on the celebratory vein. The Minister lauded South Africa's growing status as a premier global leisure destination: "...South Africa consists of a tapestry of interwoven

cultures, and the world's eyes have opened up like never before to the beauty, diversity of experiences and the endless possibilities our country has to offer."

The Minister noted that South Africa continues to "...entrench its status as a major international tourist and events tourism destination" and he firmly reiterated the observation by President Zuma by stating that this "...demonstrates the effectiveness of our economic democracy, underpinned by a sound foreign policy. They



South Africa's sunny weather help drive international tourists to our shores.

also indicate our systematic investment as a National Department of Tourism (NDT) in policy and strategy development and implementation."

The Minister reiterated the fact that at 10.2% growth in international tourist arrivals, South Africa recorded double the global average of 4% (United Nations World Tourism Organization estimate). Minister also attributed the growth in international arrivals to the strategic decision to invest in the emerging markets in Africa, South America and Asia.

Africa has maintained steady but solid growth and the Minister outlined plans by NDT to invest R218 million over three years to grow the country's

share of African tourists. This financial year will see the opening of offices in Nigeria, Angola and Kenya and a hub strategy will be used to establish a footprint in Ghana, Tanzania and Uganda.



The Apartheid Museum is one of South Africa's tourist attractions.

Plans to enhance South Africa's status as a destination

The impressive growth in tourist arrivals from BRICS countries in 2012 has spawned a marketing thrust in that direction and diplomatic manoeuvres to harness that emerging market. In terms of marketing destination South Africa, South African Tourism (SAT) plans to open offices in Brazil this financial year to further harness the source market potential of Brazil, which surged to number 10 overseas source market for international tourists. South Africa is looking at further exploiting its affiliation to the BRICS grouping to unlock tourist arrivals and in this regard, the Minister announced that negotiations are underway for a joint BRICS memorandum of understanding among tourism ministers.

The Minister announced other destination marketing initiatives in his speech. SAT is rolling out a global e-marketing strategy "Meet South Africa" where tourists share their South African destination experiences via their social media channels such as Twitter, Facebook, Instagram, Pinterest, YouTube and Vine. There are also plans to align the branding and service levels at the 240 Visitor Information Centres (VICs) across the country.

South Africa as a business destination

The Minister noted that not "...only have we established ourselves as a leisure destination, but we have made great inroads as a business destination as well". In that regard, the National Convention Bureau has been playing a pivotal role in harnessing national business tourism efforts by offering neutral advice and national coordination services on all aspects of hosting and organising any business tourism-related event in South Africa. The Minister noted that in its first year of establishment, the National Convention Bureau secured 87 new association meetings for the period 2013 to 2017, which will contribute more than R2.6 billion to the economy. In 2013, 38 secured associations will bring 57 000 delegates who will contribute R680 million into the economy.

Plans to boost domestic tourism

The National Tourism Sector Strategy (NTSS) identifies domestic tourism as the 'golden child' of tourism in South Africa and Minister van Schalkwyk in his speech recognised it as the "*lifeblood of our tourism sector*". The Minister noted that at any time, three quarters of tourists in South Africa are South Africans with domestic tourists having contributed R101 billion to the economy in 2011. NDT is seeking to boost domestic tourism through the Domestic Tourism Growth Strategy (2012-2020), and the VayaMzansi domestic tourism marketing campaign.

One key to boosting domestic tourism is promoting the accessibility of tourist attractions. In line with this the Minister announced that NDT, in partnership with Industrial Development Corporation (IDC) has commissioned an audit of underutilised state assets and properties for possible development into tourist attractions and facilities. The Minister also announced that NDT has also commissioned a feasibility study into a pilot budget resort chain to "...remove the final barriers to fully unlock our country's

tourism treasures and the intrinsic value of travel for all South Africans, thereby bolstering our contribution to job creation and poverty alleviation".

Unlocking potential of heritage tourism

In line with the National Heritage and Cultural Tourism Strategy, which seeks to realise the global competitiveness of South African heritage and cultural resources through tourism development, the Minister announced plans for an assessment of all World Heritage Sites. The assessment will identify interventions to be rolled out at each site in conjunction with the Department of Arts and Culture.



South Africa going big on business tourism.

Promotion of regional tourism

NDT, as part of the regional tourism support packages has compiled provincial profiles, which determined the tourism status quo in all the nine provinces. These profiles identified strategic and critical areas, which require support to ensure tourism development. Support requirements for the identified focal areas include tourism infrastructure development; service excellence awareness and training; tourism routes development; rural tourism programmes, and strategic niche tourism market development.



Artists presenting some of their heritage and cultural tourism offerings to tourists.

Contribution of tourism to the economy

Minister reiterated the observation made by the President at the launch of the International Tourist Arrival Statistics that tourism has become a major sector of the economy. Tourism has become a major contributor to the GDP and to employment creation and the Tourism Satellite Account (TSA) for 2011 released by Statistics South Africa in April 2013 shows the full extent of the contribution.

The Minister pointed out that the 2012 Tourism Bill seeks to enhance the role of tourism as a major force for the economic transformation of the country. The BEE Council, which was established to oversee the transformation of the sector, is set to monitor compliance with relevant legislation and drive transformation initiatives.

Responses to the budget speech

The Minister's budget speech was well received with members of parliament across the divide including members of the official opposition expressing an appreciation of tourism as an engine of economic growth. Mr Sayedali Shah, Shadow Deputy Minister of Tourism, noted that "...the contribution of the tourism sector to the economy of SA must be appreciated. It is within this context that we must locate the potential of the Tourism Sector to be the engine for job creation". Mr Stuart Farrow, Shadow Minister of Tourism concurred: "Tourism's role in the growth of our economy and as a job creator has been totally underestimated..." and he went further to acknowledge the growth in international arrivals: "...To see a 10.2% increase in international tourists from 8.34 million to 9.2 million is no mean feat considering also the small budget the National Department of Tourism has to operate on and the current trends coming out of our non-traditional countries".

Debating the budget vote, Honourable C.N. Zikalala, MP (IFP) supported efforts to boost domestic tourism and noted: "Our most valuable tourists however should always be our own people" and also hailed NDT's marketing strategies: "The Department of Tourism must be commended in their drive to promote South Africa..." Honourable Xoliswa Makasi (ANC) reiterated the Ministers call for transformation and indicated that "...there is dire need of a drive towards increasing economic participation by the historically marginalised, with the tourism sector having much to gain from transforming itself and the benefits of this transformation".

NDT contribution to Expanded Public Works Programme (EPWP)

The Minister reported that NDT exceeded the EPWP target for full-time equivalent jobs in the past financial year through a number of Social Responsibility Implementation (SRI) projects. NDT's flagship SRI under EPWP is the Young Chefs Training Programme. As part of the programme, NDT trained 500 young chefs and placed 120 of them in established hospitality institutes. There are plans to enrol 500 more young persons as part of the EPWP in this financial year.

Development of SMMEs

The Minister aptly summed the role of the tourism sector in the development of SMMEs: "This sector has become a fertile breeding ground for small, medium, and micro-sized enterprises

(SMMEs)". This observation is in sync with the fact that Tourism Enterprises Partnership (TEP) exceeded its performance indicators for 2012 – supported 5003 jobs created by SMMEs, which delivered an increased turnover of R785 million. Cumulatively over the last ten years, TEP has contributed to the creation of 75 786 jobs and a turnover increase of over R6.4 billion. The Minister reported that TEP was to receive R25 million in the 2013/14 financial year to support SMME development.

Further Education and Training

NDT is spearheading Further Education and Training (FET) through the Tourism Accelerated Apprenticeship Programme (TAAP). The TAAP provides further education and training to tourism graduates through practical training and exposure through skills development. It also familiarises the graduates with the operational side of the tourism and hospitality sector. In 2013/14 financial year, R3 million has been allocated and it will be utilised for the recruitment and placement of 100 interns across the country.

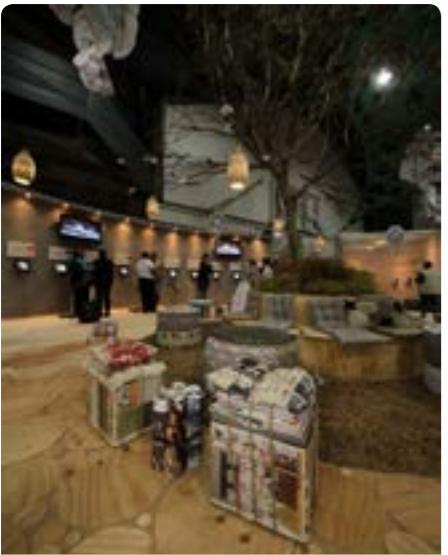
Transformation of the Tourism Sector

NDT is driving the transformation agenda in the tourism industry with the objective of spreading the benefits of the sector and to ensure sustainable development of the sector.

Heritage and Cultural Tourism at the Tourism Indaba 2013

The 2013 Tourism Indaba once again presented an exuberant show piece of the 'Heritage and Culture Pavilion' showcasing the cultural diversity South Africa has to offer in the form of the eight World Heritage Sites.

The following are the UNESCO proclaimed World Heritage Sites of 'Outstanding Universal



The Heritage and Culture Pavilion was one of the Indaba's highlights

Value' to mankind: the Mapungubwe Cultural Landscape; the Cradle of Humankind (Fossil Hominid Sites); Vredeford Dome WHS; Richtersveld Botanical and Cultural Landscape WHS; iSimangaliso Wetland Park WHS, uKhahlamba Drakensberg WHS; Robben Island Museum WHS; and the Cape Floral Kingdom WHS. The primary objective of the 'Heritage and Culture Pavilion' was to profile and promote the World Heritage Sites in South Africa as globally competitive destinations. Furthermore, it was meant to raise awareness of the precious and rich cultural diversity of unique offerings embedded in the World Heritage Sites.

Whilst the Pavilion celebrated South Africa's eight UNESCO World Heritage Sites, it also epitomised the wealth of lifestyle and cultural experiences that South Africa offers. It gave a rich peek into the soul of the destination: its design; food; warm and typically welcoming hospitality; uniquely South African laid back yet elegant sense of style; and its unique heritage and cultural attractions that wait to be explored.

It brought to vivid and colourful life the



Dr. Albertina Luthuli at the Indaba artists corner.

mandate of the National Department of Tourism's Heritage and Cultural Strategy, that was launched last year, and which gave the South African travel and tourism industry direction to unlock the immense economic potential of heritage and cultural tourism.

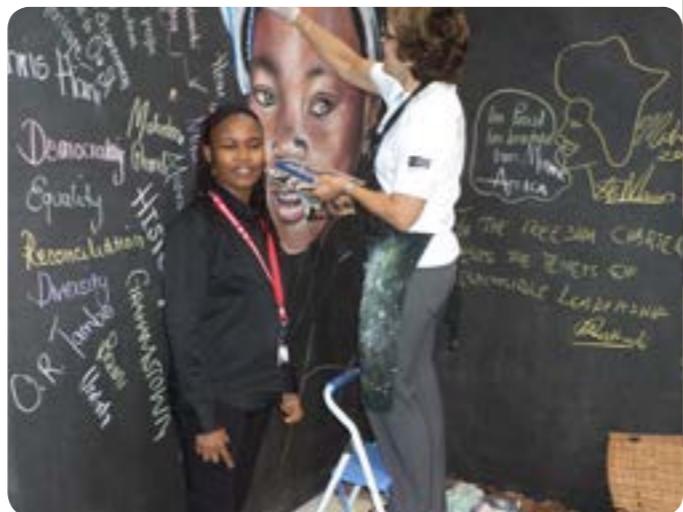
"The unique majestic setting and physical location of the World Heritage Sites, chiefly in untapped prime rural and semi-urban economies, resonates with the strategic choices of NDT of initiating programmes and projects that seek to respond to the national outcomes and priorities of Government, namely economic development and job creation, rural development and regional Integration. In this



"The rationale behind the aesthetic and vivid spectacle of the 'Heritage and Culture Pavilion' is informed by a set of policy positions and strategy frameworks of the National Department of Tourism ..."

context, it is crucial that tourism serves as a catalyst to unlock the socio-economic potential of heritage and cultural tourism products for sustainable livelihood at local community level".

The rationale behind the aesthetic and vivid spectacle of the 'Heritage and Culture Pavilion' is informed by a set of policy positions and strategy frameworks of the National Department of Tourism, particularly the White Paper on the Development and Promotion of Tourism in South Africa (1996), National Tourism Sector Strategy (2011), Domestic Tourism Growth Strategy (2012), National Heritage and Cultural Tourism Strategy (2012) and the National Rural



Tourism Strategy (2012). Collectively, these policies and strategies continue to create an enabling environment to unlock the tourism potential of a diverse range of products and offerings, which set South Africa as a globally competitive destination.

To complement the 'Heritage and Culture Pavilion' at the Tourism Indaba, NDT in partnership with SAT hosted a resounding successful speed marketing session, which was facilitated by the renowned iconic afro-jazz musician, Mr Vusi Mahlasela. The audience was treated to an enchanting cultural heritage

experience filled with zest for life. The speed marketing served as a trade session between product owners of heritage and cultural tourism products and potential buyers. The potential buyers were enticed to invest in heritage and cultural tourism products.

Most notably, throughout the duration of the Tourism Indaba, NDT together with SAT presented a DVD on heritage and cultural tourism products in the World Heritage Sites. In line with the objective of raising awareness, the DVD which showcases the eight World Heritage Sites in South Africa is set to effectively profile and market the unique offerings of both cultural and natural heritage resources in the World Heritage Sites. To enhance destination

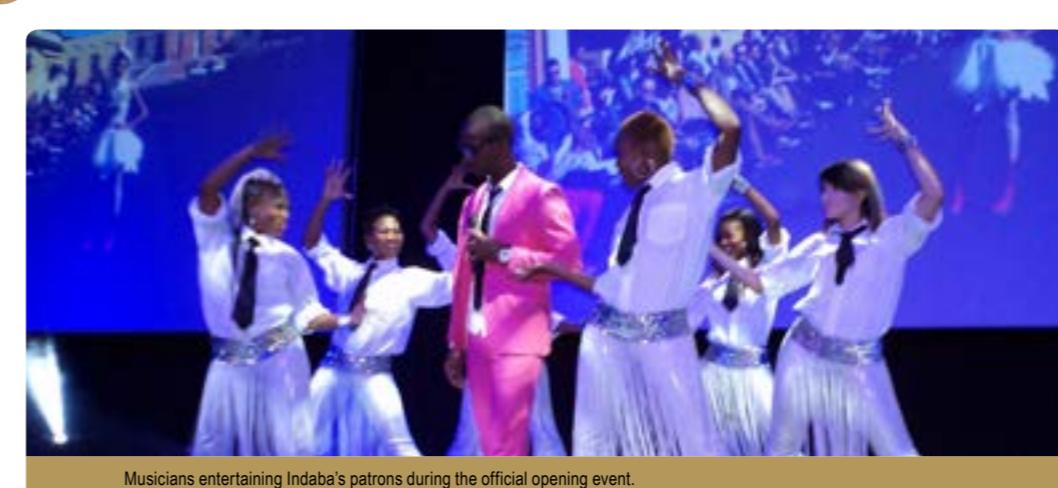


Minister van Schalkwyk engaging Indaba delegate on a discussion.

marketing, the DVD will be presented at ports of entry into South Africa, South African Missions and Embassies and multi-media platforms.

It is without doubt that heritage and cultural tourism products are notably the fastest emerging competitive niche or product within international and most importantly domestic markets, even at these crucial times of economic crisis. Of paramount importance, this segment of tourism continues to present an opportunity for an organic experience of cultural exchange between foreign tourists and indigenous local communities, where both cultural groups participate in a tourism experience. In 2011, the central theme for the World Tourism

Day celebration (27th September 2011) was 'Tourism linking Cultures', where the intrinsic value and benefit of heritage and cultural resources is clearly defined in the statement: "Experiencing different ways of life, discovering new food and customs and visiting cultural sites have become leading motivations for travel, and as a result, a crucial source of revenue and job creation, particularly for developing countries." Over the past decade the trends in heritage and cultural tourism are increasingly showing that travelers are seeking authentic and memorable experiences through meaningful interaction with local people and cultures.



Musicians entertaining Indaba's patrons during the official opening event.





Working together in Positioning Tourism as a National Growth Driver in the South African Economy: South Africa's Tourism Arrival Figures Take Centre Stage

The South African tourism sector has been working hard in actively developing the status of tourism as the 'new gold' to the South African economy. The phenomenal growth in international tourist arrival figures announced by President Jacob Zuma at the Victoria and Alfred (V&A) Waterfront in Cape Town on the 25th of April 2013 is testimony to the growth of South Africa as a destination of choice for international tourism.

The figures point to a continuous upward trajectory in tourism arrivals from the modest arrival figures at the advent of independence 20 years ago and bear testimony to the fact that South Africa is indeed gunning for the Top 20 destination by the 2020 target set in the National Tourism Sector Strategy.

Overview of international tourist arrivals to South Africa in 2012

South Africa continues to grow as a destination of choice with its average growth rate for 2012 more than double the 2012 global average which was estimated at 4% by the World Tourism Organisation. Tourism arrival



President Zuma announcing the 2012 Tourism Statistics at the Victoria & Alfred Waterfront in Cape Town.

figures continue on an upward trajectory with 9 188 368 international tourists visited SA in 2012, 10.2% up from the 8 339 354 tourists in 2011.

President Zuma lauds the Tourism Sector

Announcing the 2012 Tourism Statistics at the Victoria & Alfred Waterfront in Cape Town

on the 25th of April 2013, President Jacob Zuma noted the fact that South Africa is becoming a competitive marketplace and a destination of choice and lauded the efforts of the various tourism stakeholders in the growth: "...This phenomenal tourism growth is evidence that we are successfully setting ourselves apart in a competitive marketplace and that South Africa's reputation as a friendly, welcoming, inspiring,

2012 International Tourist Arrival Figures at a Glance

- 9 188 368 international tourists visited SA in 2012, up from the 8 339 354 tourists in 2011.
- 2012 Arrivals are 10.2% higher than the 2011 Arrivals and double the 4% global arrival figures.
- Tourist arrivals dominated by arrivals from overseas tourist markets (15.1%), with Europe accounting for more than half (9.5%) of the overseas tourists.
- Europe – the prime source of international tourists with United Kingdom being the biggest overseas market.
- Asia – emerging tourism market with a 33.7% growth from 2011 – driven by exponential growth in China and India.
- China – fourth biggest overseas tourist market with 132 334 tourists.
- Central and South Africa – emerging as a major market anchored by Brazil which recorded 37.0% growth from 2011 and became the ninth largest market.
- African markets – resilient as the bastion of the South African Tourism market with 8.5% from 2011.

and unique tourism destination continues to grow".

President Zuma congratulated the different role players including the general South Africans for working together and for the concerted efforts which have led to the growth of tourism in the country: "Allow me to use this opportunity once again to congratulate and thank all South Africans for ensuring the success of our tourism strategy...Let me also congratulate the Minister of Tourism and the entire tourism sector for this performance. The fruits of your hard work are visible".

The president expressed confidence that the sector is making good progress in growing the tourism sector but warned the sector against any complacency in the face of competition for the global tourism share.

Key drivers for the surge in tourism arrivals



President Zuma and Minister van Schalkwyk during the Tourism Arrival Statistics Launch.

The growth in tourism numbers can be traced to a number of strategic decisions regarding tourism by the South African government. First and foremost, the growth of the tourism industry may be attributed to the visionary decision by the South African government to create a stand-alone National Department of Tourism. President Zuma commented on

this strategic move which spurred the tourism industry: "In 2009, we decided to create a stand-alone National Department of Tourism as we knew the potential of tourism as a job creator and also as a sector that would open our beautiful country to the world".

The South African government's decision to designate tourism as one of the six job drivers in the New Growth Path has also opened the sector for investment. The National Tourism Sector Strategy, which envisions South Africa as a Top 20 world tourist destination by 2020, has mobilised and emboldened the tourism sector given the participatory and consensus seeking nature it was developed.

The emerging markets are becoming more and more prominent in contributing to the growth of tourism in South Africa. South Africa's affiliation to the BRICS grouping seems to have effectively unlocked tourist arrivals from China, India and Brazil.

South Africa's affiliation to BRICS has become a boon for tourism in South Africa

Chinese arrivals tripled since 2009 with 132 334 tourists in 2012 and China surged into fourth biggest overseas tourist market; India weighed in with 106 774 visitors and recorded



Journalists and dignitaries listening to the President announcing the 2012 Tourism Statistics.

an 18.2 growth coming in at eighth largest overseas source market; while Brazil came in ninth position with a growth of 44.7%. Chinese growth epitomised and buttressed the strong growth of Asia, which recorded a massive 33.7% growth from 2011 is showing all the signs of future dominance of South Africa's overseas tourism market.

an increase in trade relations between China and South Africa, with considerable Chinese investment in South Africa and an increase in interest, awareness and understanding between our two countries. This period has also coincided, to the excitement of all of us in the tourism industry, with a strong increase in tourist arrivals from China, which has become South Africa's fourth biggest overseas market".

On a recent roadshow to China to celebrate a fruitful 2012 in tourism arrivals in which China became the fourth largest overseas market Minister of Tourism, Mr van Schalkwyk, noted:

"Since our country took its place among Brazil, Russia, India and China in the BRICS in 2011, we have witnessed



Tourism's status as a stand-alone department has contributed to tourism growth.

countries accounted for 330 834 of the international tourism numbers in 2012 and the potential for further growth is huge..."

The marketing and promotional forays of South Africa Tourism to China; the opening up of the skies through direct flights to Beijing by South African Airways and opening up of new South African visa processing centres in China seem to be paying massive dividends for the South African tourism industry.

The fact that South Africa recorded 10.2% growth in international tourist arrivals, more than double the global average of 4% points to the quality and marketability of South Africa as a tourist destination. South Africa's democratic dispensation; peace and tranquillity; and its reputation as a friendly, welcoming, inspiring and unique tourism destination also fired the growth in international tourist arrivals. NDT's Service Excellence Strategy seems to be bearing fruits as South Africans are now complementing the natural endowments and outstanding facilities with treating visitors warmly and hospitably.

South Africa's democratic dispensation and hospitality has become a major tourist draw card

President Zuma concurs: "...The BRICS summit held in Durban last month highlighted the economic potential that our affiliation with the bloc has for South Africa and the tourism market was no exception. Tourism arrivals from the BRICS

Tourism the "New Gold"

The status of tourism as one of the engines of economic development is acknowledged by the fact that it is one of the key sectors envisaged in the New Growth Path economic strategy as one of the six job drivers. That status as the emerging "new gold" came out vividly when the President, at the launch of the 2012 Tourism



South Africa's affiliation to BRICS has become a boon for tourism in South Africa.

Statistics in Cape Town referred to the latest Tourism Satellite Account (TSA) for the period ending December 2011 released by Statistics South Africa.

"We are very proud that a country that was once a pariah state is now attracting more international visitors each year..."

Highlights from the TSA confirm that tourism is now a key engine for the South African economy. Direct tourism contribution to the



South Africa's democratic dispensation and hospitality has become a major tourist draw card.

GDP went up by 5% to R84.3 billion in 2011 while direct employment as a percentage of overall employment went up from 4.3% in 2010 to 4.5% in 2011. Foreign tourists spent R76.4

billion in South Africa in 2012 up 7.6% on the 2011 figures, spurred by spend by tourists from Europe, the Americas, Asia and Australasia.

The only dips in the overall growth trend for South African tourism was the reduction in average spend per tourist, which declined by 2.3% as well as the reduction in the number of average nights per tourist, which declined from



The Drakensburg Mountain, one of the key attractions which make South Africa a beautiful destination.

8.5 to 7.6 nights. These dips are attributable to the global economic challenges, which impacted on tourism spend over the period. However, the statistical release (P6410) on Tourist accommodation by the Statistics South Africa embargoed on the 22nd of April 2013 seem to be pointing to reversal of the dip with an 3.8% increase in the number of stay unit nights and a 5.4% increase in the average income per stay night sold.

Gunning for Top 20 by 2020

The continuous growth in tourism numbers seems to be a vindication of the President Zuma and his government's decision to create a stand-alone National Department of Tourism (NDT) in 2009. NDT has been mobilising tourism stakeholders across the country to refine and polish the "new gold" as South Africa continues gunning for the Top 20 by 2020 as envisioned by the National Tourism Sector Strategy. If the growth continues on this trajectory, the targets of creating 225 000 additional jobs and contributing half a trillion to the GDP are clearly achievable.

President Zuma aptly summed up the mood within the sector about the successes of the industry: *"We are very proud that a country that was once a pariah state is now attracting more international visitors each year... As a tourism industry we have to remain committed to working together to grow tourism to our country, with the support of all South Africans".*



NDT in a Partnership to Review Tourism and Hospitality NC (V) Curriculum

The recent tourism performance statistics presented by President Jacob Zuma bears testimony that all hands are on the dock in the tourism fraternity in South Africa with tourism industry players hard at work in the quest for South Africa to be the destination of choice, amongst other tourism competitors. To maintain or at best enhance this tourism performance, there is need to ensure all tourism industry players are on-point and are performing at their absolute optimal capacities.

Notwithstanding, the National Department of Tourism has over the years received feedback from other tourism industry players to the effect that the school leavers and graduates from the Further Education and Training (FET) Colleges with tourism qualifications do not demonstrate readiness to enter the job market – their knowledge and skills base appear to be shallow to enable them to perform optimally in the industry. This then raised questions on the suitability and sufficiency of the tourism and hospitality qualifications at these levels of the education system. Furthermore, an investigation done by NDT indicated that as of 2008 the number of learners progressing from high school into tertiary education in the fields of tourism and hospitality had been observed to be dwindling over the years. Furthermore,

the investigation also revealed that the quality of the tourism and hospitality curricula was questionable. The extent to which the curriculum indicated some form of articulation from schooling through to the Further Education and Training (FET) and Higher Education Institution (HEI) levels was also questionable. Equally unlike any other traditional subjects in schools, it was discovered that there was never an evaluation and analysis process done to the curricula of the hospitality and tourism subjects. This summarises the problem statement that led to the commissioning of the Umalusi study on the evaluation of the tourism and hospitality programme. This study on the evaluation of the tourism and hospitality programme was



Mr Lulamile Stuurman of NDT making a presentation during the launch of the Umalusi Report.

followed by a report entitled "At your service – Towards an informed understanding of the NC (V) Tourism and Hospitality programmes".

NDT's involvement in tourism and hospitality curriculum evaluation process

On the surface, NDT's involvement in curriculum evaluation intervention may seem controversial, since curriculum development and review matters are known to be the competences of the Departments of Basic Education and Higher Education and Training. The mandate of NDT on the other hand is to grow and develop tourism. It is widely accepted that tourism growth and development will be enhanced when the tourists feel that they received value for money during their visit. It can be argued that providers of tourism services and products who are appropriately trained are better positioned to deliver high level of this 'value for money' experience to the tourists they interact with. Consequently, curriculum evaluation studies that would result in re-engineering of the tourism and hospitality curriculum that would in turn respond to the challenges of the tourism and hospitality industries would go a long way in supporting the mandate of NDT – to grow and develop tourism.

The commitment of NDT to this curriculum evaluation process is also exemplified by the financial commitments NDT made towards the last two workshops of the study, according to Mr Stuurman.



It will require many hands towards responsive curricula

How did the study unfold?

The study was undertaken in phases between March 2011 and July 2012 through a series of multi-stakeholder workshops. Workshop participants were drawn from a wide range of stakeholder groups including organs of state such as the National Department of Basic Education, Provincial Education Departments, Department of Higher Education and Training, Higher Education South Africa (HESA), educational institutions such as universities, FET colleges, other private colleges and schools. Representatives from other tourism industry stakeholders such as company members of Federated Hospitality Association of Southern Africa (FEDHASA) and other private organisations formed part of the study participants. The Culture, Arts, Tourism, Hospitality and Sports Sector Education Training Authority (CATHSSETA) was a funding partner to the process and ensured that its training provider stakeholders formed part of the study participants. International players in the name of the Government of Western Australia Curriculum Council were also engaged in the study. Although NDT was given the observer status, NDT representatives participated in all the research processes.

During these organised workshops, the curriculum evaluators who participated in the study interrogated the hospitality and tourism curriculum in order to answer questions relating to such concepts as sequencing, progression and weighting or how to determine the cognitive demand inherent in a question. Key research questions that were used to guide workshop discussions are presented below:

- What is the quality and standing of the curricula of the subjects included in the NC (V) Tourism and Hospitality programmes on Levels 2, 3 and 4?
- How do the curricula in question prepare students for operational skills and/or systemic thinking (managerial) skills, and how well do they do so?
- Except for 'designation', what other criteria should serve as articulation indicators?
- Do the NC (V) Level 4 exam papers comply with the requirements stipulated in Assessment Guidelines?
- Are the exam papers aligned with the topic weighting and the intended content and skill focus outlined in the Subject Guidelines?
- Which cognitive categories appear in the 2011 NC (V) Level 4 examination papers for the subjects in the Tourism and Hospitality programmes?
- What is the cognitive demand and level of difficulty of the assessment items (questions) in the NC (V) Level 4 exam papers in the Tourism and Hospitality programmes?
- What are the levels of progression between NC (V) Levels 2, 3 and 4?

Over and above working towards finding answers to the questions enlisted above, the study also engaged a benchmarking exercise in order to establish the standing of the tourism and hospitality curricula internationally as well as identifying learning pathways in a global market.

A stakeholder feedback seminar was held at the National Tourism Careers Expo 2012 as part of the Educators Seminar for 2012, followed by research report compilation that was finally launched in March 2013.

What is this NC (V) programme?

From January 2007 all other Public FET Colleges started offering exciting, modern and relevant programmes of study in vocational programmes. These vocational programmes have specifically been designed and introduced at public FET Colleges to directly respond to the priority skills demand of the modern economy within South Africa.

The National Certificate (Vocational) replaced the NATED courses (N1-N3) at public FET Colleges as a new and modern qualification at Levels 2, 3 and 4 of the National Qualifications Framework (NQF).

The National Certificate (Vocational), or NC (V), gives students with a Grade 9 qualification a vocational alternative to an academic Grade 10-12 by offering industry-focused training on the NQF Levels 2-4.

These qualifications are designed to provide training at both the theoretical and practical levels. The practical component of study may be offered in a real workplace environment or in a simulated workplace environment. It will provide students with the opportunity to experience work situations during the period of study. The qualification also provides an opportunity to enter Higher Education studies at Universities or Universities of Technology subject to appropriate subject combinations and meeting the required admission requirements for these institutions.



Tourism and Hospitality students during a learning event.

What are the key findings of the Study?

On the whole, the study established that the Tourism and Hospitality NC (V) programmes are credible and address the skills requirements in the industry with reference to the quality and standing of the two programmes at all the NQF Levels 2, 3 and 4. This observation was more specific to the Hospitality programme where it was established that the level of details contained in the programme was adequate to provide students with sufficient ground to respond positively to the skills requirements in the industry. However, gaps were identified on the Tourism programme, where it was observed that the programme covered a broad spectrum of content/concept but lacked sufficient depth that would allow for development of all critical Tourism skills required in the industry to enable the student to leave the Tourism programme and enter the workplace seamlessly. The research team recommended that the curriculum be trimmed to reduce the breath of content at certain NQF levels that will in turn allow for in-depth interrogation of the remaining content.



Student taking an assessment test for Tourism/Hospitality programme.

Furthermore, the study observed that each of the three NQF Levels – 2, 3 and 4 for the Tourism curriculum were written as an exit level qualification, with distinct lack of seamless progression from one NQF level to the next. The study also questioned the readiness of the students exiting at Levels 2 and 3 for the workplace. The research team recommended that efforts should be expanded in condensing the three NQF levels into a single qualification with an exit at NQF Level 4.

The study further established that the Tourism and Hospitality NC (V) programmes would not prepare students sufficiently for them to enter the workplace at managerial level, and perhaps it should not be the intention of these NC (V) programmes to produce candidates for managerial positions.

Shortfalls in relation to the assessment structuring and tasks were noted by the research

team for the Tourism programme, where it was reported that there was a general lack of compliance with the Assessment Guidelines. The examinations were also observed to comprise questions adjudged as very easy, and also not requiring students to demonstrate their analytical and problem solving skills, but rather requiring students to simply regurgitate what they have learnt. However, the Hospitality programme demonstrated more acceptable trends on the above aspects. Since the above shortcomings have been in part ascribed to lack of capacity of examiners and moderators, the study recommended urgent need for strengthening capacity of these examiners and moderators through regular organised and structured training.

of key issues to consider for implementation, including the following:

- Continuous in-service lecturer training and development for deeper insight in subject matter and methodology;
- Pre-service preparation of lecturers in the particular fields and methodology (higher education institutions to support initiatives in offering teacher training courses);
- Credit accumulation to allow transferability across institutions of learning and industry (articulation pathways);
- The involvement and collaboration of all industry stakeholders, communities benefiting from the fields and government support and funding;
- Creating more experiential learning opportunities to experience the world of work;
- Knowledge and skills (applied knowledge) and holistic competencies to be developed in depth;
- Narrow down the curriculum to ensure depth to suit industry needs and ensure smooth articulation into further education; and
- Design effective assessment tools ensuring learner preparation to think systemically, creatively, and be able to substantiate opinions.

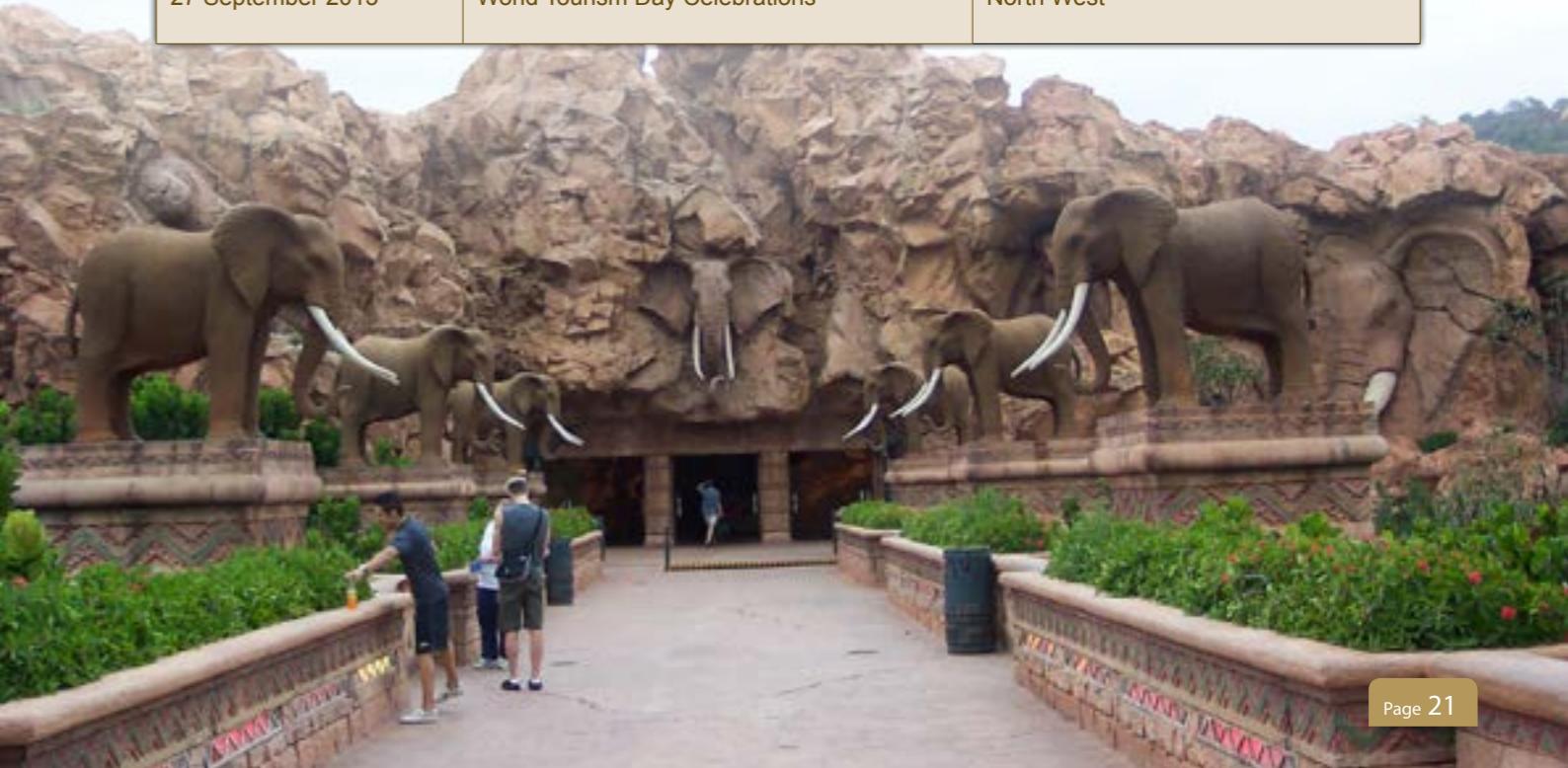
What now?

Another observed shortcoming was the lack of pedagogical support to both the Tourism and Hospitality lecturers, notwithstanding the existence of the Subject Guidelines. The research team recommended that regular training courses for lecturers of these programmes be organised and offered. These training interventions need to be ongoing, focused, practical and user-friendly in order to engage lecturers fully.

The international benchmarking exercise conducted with the Western Australian Certificate in Education (WACE) Manual was due to the similarities in the South African and Australian education systems, and also considering that some of the researchers had some kind of association with Australia. The benchmarking assignment revealed a number

UPCOMING TOURISM EVENTS

Date	Event	Province\Location
10 June 2013	NDT's Deputy Minister and Proudly SA Business Breakfast	Capital Hotel School - Gauteng
25 June 2013	The Transport Africa Awards 2013	Sandton Convention Centre - Gauteng
18 July 2013	Mandela Day	Nationwide charity activities
August 2013	Tourism Month Launch	TBC
07-11 August 2013	Decorex	Midrand - Gauteng
10-3 September 2013	Sports and Events Tourism Exchange	Durban ICC- KwaZulu-Natal
15-19 September 2013	Leisure and Recreation Association of South Africa (LARASA) 2 nd International Congress	Durban – KwaZulu-Natal
19-21 September 2013	National Tourism Career Expo	ICC, East London – Eastern Cape
20-24 September 2013	Soweto Festival Expo	Narsrec Expo Centre – Gauteng
27 September 2013	World Tourism Day Celebrations	North West



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