TOURISM RESEARCH AGENDA

2024/25– 2026/27

tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

30 YEARS OF FREEDOM
South Africa 1994 - 2024

South Africa

SOUTH AFRICAN TOURISM

Tourism Research Agenda

Advancing Tourism Growth, Development and Sustainability Through Evidence-Based Research

Acronyms

AI	Artificial Intelligence
CBT	Community-based Tourism
ERRP	Economic Reconstruction and Recovery Plan
GHG	Greenhouse Gas
IST	Indigenous Story Teller
MoA	Memorandum of Agreement
MICE	Meetings, Incentives, Conferences and Exhibitions
MPRDA	Mineral and Petroleum Resources Development Act
NHI	National Health Insurance
NTSS	National Tourism Sector Strategy
SLA	Service-level Agreement
SMME	Small, Medium and Micro Enterprise
TSRP	Tourism Sector Recovery Plan
UA	Universal Accessibility

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I. Introduction

The tourism sector has made a significant impact on the global economy and job creation over the years. It is widely considered to be a viable sector for sustainable socio-economic development due to the integrative nature of its value chain, as well as the economic multiplier effect. However, during the outbreak of the COVID-19 pandemic, the sector was severely affected due to the implementation of travel restrictions in almost all countries to stop the spread of the virus. In South Africa, the development of the Tourism Sector Recovery Plan (TSRP) in 2021, underpinned by the Economic Reconstruction and Recovery Plan (ERRP), was developed to facilitate the recovery of the sector to preserve jobs and livelihoods, facilitate new job opportunities, match demand and supply, and strengthen transformation.

To enable the recovery, growth and sustainability of the sector, research is necessary to foster evidence-based planning and aid informed decision making. Research is the foundation upon which progress and innovation are built. It is through research that new ideas are generated, theories are tested, and knowledge is expanded. Without reliable information about the economic and social environment, making sensible choices that produce positive outcomes is impossible. Moreover, a lack of proper research and analysis about the existing, as well as future situations, could lead to ineffective planning, policy interventions and decision making. Thus, evidence-based and timely, high-quality research is crucial to produce knowledge that is applicable to inform policy interventions, decision making and future project implementation.

Strategic documents, such as the National Tourism Sector Strategy (NTSS): 2017–2026 and the TSRP: 2021, identify research as a critical area to inform recovery and drive growth of the tourism sector. These documents emphasise that, guided by evidence-based research, the tourism sector would be able to develop and implement policies, strategies, programmes, interventions and decisions to meet the needs and expectations of different stakeholders.

Despite progress made to advance tourism research and the important role that research plays in the sector, a number of limitations are still visible. One of the challenges has been the general lack of cooperation and collaboration between different stakeholders in respect of tourism research, often resulting in resource wastage and duplication of efforts.

Furthermore, available research is not always useful to address the needs of key stakeholders. Relevant tourism research capacity is also limited, thus impacting the generation of high-quality, timely, consistent and evidence-based information and knowledge. It is in light of the above that the Department of Tourism embarked on a process to develop the Tourism Research Agenda: 2024/25–2026/27 to identify, guide and inform current and future tourism research priorities and needs, with a view to inform sector policy, planning and decision making.

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2. Overview
of the Tourism Research Agenda

The Tourism Research Agenda serves as a framework to identify, guide and inform current and future tourism research priorities and needs, with a view to informing policy, planning and decision making, as well as departmental strategies, programmes and interventions. The Tourism Research Agenda aims to outline a framework for making decisions about current and future research priorities. It therefore seeks to do the following:

- **Identify existing knowledge and gaps in tourism research**

- **Prioritise research themes and focus areas**

- **Align research efforts from various tourism stakeholders**

- **Create an opportunity for future research collaboration among various tourism stakeholders**

2.1 Objectives of the Tourism Research Agenda

The objectives are as follows:

- Provide overarching research themes and focus areas to enhance the productive capacity of the tourism sector by equipping the sector with the evidence-based information and knowledge required to plan for current and future challenges and interventions

- Offer a mechanism to effectively identify, guide and inform current and future tourism research priorities and needs

2.2 Research Agenda principles

The core principles are as follows:

- Review and prioritise research themes and focus areas based on current gaps and a needs assessment

- Maintain regular engagement with sector stakeholders to identify research gaps and needs

- Foster research collaboration among tourism stakeholders

- Ensure that research findings and outcomes are more practically focused and accessible to tourism stakeholders and the general public

3. Tourism Research Agenda
development process

The process of developing the research agenda begins with reviewing strategic documents such as the National Tourism Sector Strategy, the Departmental Strategic Plan, the Tourism Sector Master Plan, the Tourism Sector Recovery Plan, the Economic Reconstruction and Recovery Plan, and the White Paper on the Development and Promotion of Tourism in South Africa.

Additionally, for the research agenda to be relevant, stakeholder consultations become crucial as they enable the identification of trends and emerging challenges that are currently affecting or could affect the tourism sector in the future. Therefore, engaging stakeholders allows for diverse perspectives that could provide new insights and assist to develop mitigation strategies through research. On this basis, the Tourism Research Agenda was developed through a consultative process using various platforms, as indicated in Table 1.

Table 1: Stakeholder consultation method

Stakeholders	Method of consultation
Provincial and local municipalities' tourism researchers	National Tourism Research Committee: Virtual meetings
Provincial and local municipalities' tourism officials	Local Government Tourism Peer Learning Network: Face-to-face engagements
Academia	Email survey
Tourism businesses and associations	
All other stakeholders	Social media survey (departmental website, Twitter, Facebook)

The process followed in developing and implementing the research agenda is depicted in Figure 1.

Figure 1: Tourism Research Agenda process flow

1 Review strategic and policy documents

Strategic documents such as the National Tourism Sector Strategy, Strategic Plan, Tourism Sector Master Plan, Tourism Sector Recovery Plan, Annual Performance Plan, White Paper on the Development and Promotion of Tourism in South Africa are reviewed.

2 Compile draft Tourism Research Agenda

Draft research agenda is compiled based on the review of the strategic and policy documents.

3 Stakeholder consultations – internal and external

Internal and external stakeholders are consulted on the draft Tourism Research Agenda.

4 Develop final Tourism Research Agenda

The final Tourism Research Agenda is developed based on the outcome of stakeholder consultations.

5 Recommendations of priority research studies

Research studies to be conducted in a particular year are identified and prioritised.

6 Approval of priority research studies

The concept document and priority research studies are approved by the Director-General.

7 Appointment of research institutions to conduct research studies

Public higher education and research institutions are appointed to form part of a panel of researchers.

8 Execution of research studies

The appointed public higher education and research institutions execute the prioritised research studies.

9 Dissemination of completed research studies

The research outputs are disseminated at the Tourism Research Seminar and shared online through the Tourism Research Repository.
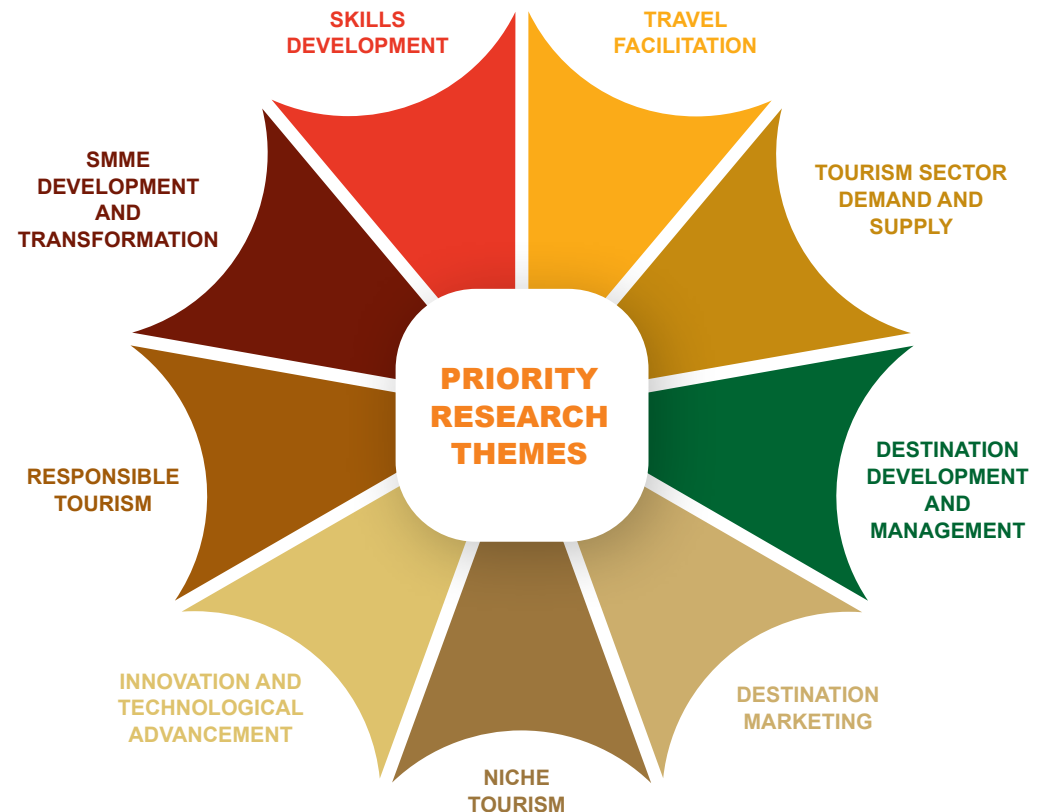
4. Priority research themes
2024/25–2026/27

Priority themes and focus areas were identified based on the review of strategic and policy documents and stakeholder consultations. However, the list is not exhaustive, as it will be reviewed and updated annually based on new and emerging needs and priorities. A research prioritisation process, as highlighted in Step 5 and 6 in Figure 1, will be followed to identify and prioritise specific research studies to be conducted in a particular year. Figure 2 depicts the research priority themes for 2024/25 to 2026/27.

As depicted in Figure 2, the research priority themes are skills development, travel facilitation, tourism sector demand and supply, destination development and management, destination marketing, niche tourism, innovation and technological advancement, responsible tourism, and small, medium and micro enterprise (SMME) development and transformation. In addition to the graphical depiction of the priority themes, a detailed discussion of the themes is provided on the following pages.

Figure 2: Priority research themes –2024/25–2026/27

Skills development

This theme encompasses issues related to the training and development of graduates and workers in the tourism sector. It discusses the issues related to the mismatch between the tourism sector's skills needs and higher education graduates' competencies and skills.

Travel facilitation

Issues in this theme are related to the aviation and airlift industry, as well as to visa regimes. The proposed research aims to explore challenges constraining the aviation industry, including air service agreements between countries, routing, capacity and load factors, slots, pricing, aviation licensing, as well as cost input for airlines. The proposed research will furthermore look into challenges related to visa issues.

Tourism sector demand and supply

This theme encompasses issues related to meetings and events, a sharing economy, and the management of disasters and pandemics.

Destination development and management

This theme covers issues related to transport infrastructure, the infrastructure finance and governance model, tourism safety, route development, product development and enhancement, and tourism safety.

Destination marketing

This theme comprises matters related to domestic tourism, market trends, competitiveness and tourist experiences.

Niche tourism

Issues covered under this theme include community-based tourism, township tourism, rural and events tourism, eco/adventure tourism and geo-tourism.

Innovation and technological advancement

This theme comprise matters related to the digital network infrastructure, digital transformation for innovative strategies, Artificial Intelligence (AI) and robotics, as well as cyber security.

Responsible tourism

This theme covers issues related to Universal Accessibility (UA), sustainable tourism and climate change.

SMME development and transformation

This theme covers issues relate to the SMME funding mechanism, transformation and broader considerations linked to the development of SMMEs.
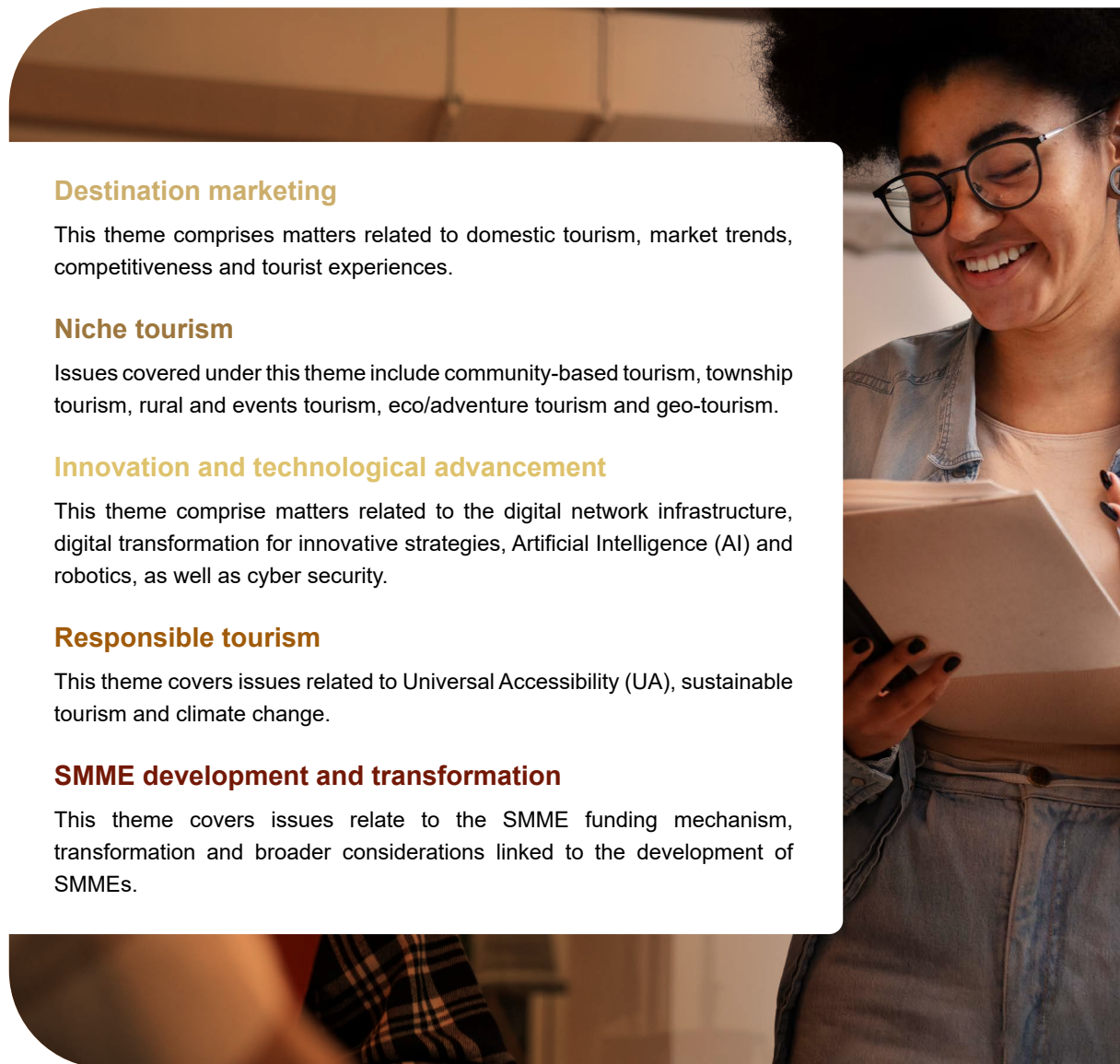
In addition to the summary of the themes provided above, Table 2 provides a detailed discussion of the themes. This includes the research focus area, the study context area, as well as the purpose of the research.

Table 2: 2024/25–2026/27: Research themes and research focus areas

Research theme	Research focus area	Study context	Research purpose	Source
Skills development	Skills and training	The tourism industry is a labour-intensive sector. Therefore, a well-trained, skilled and knowledgeable workforce can contribute to destination competitiveness and establish a viable sector. The tourism industry requires graduates that are adequately trained, skilled, and with employable attributes. However, there see ms to be a non-alignment between the sector's skills needs and higher education graduates' competencies and skills, which may necessitate a shift in the curricula to focus on factors that will advance employability.	Review the existing tourism curriculum and approaches to tourism education and training in order to incorporate the intrinsic and requisite skills demanded in and relevant to sector needs, and align supply with the changing skills required to recover the sector. This will assist in the development of a curriculum that is responsive to labour market needs and able to produce employable graduates.	• White Paper on the Development and Promotion of Tourism in South Africa • Stakeholder consultations
			Explore ways that will assist in positioning tourism as a viable career within communities and fostering a greater understanding of the utility of service skills so that the sector can help to develop long-term personal growth.	
Travel facilitation	Aviation and airlift	Tourism relies on the aviation industry to bring visitors to South Africa from all over the globe. Therefore, a well-functioning and competitive aviation industry will have a positive impact on the tourism sector. However, there are concerns that the aviation industry is faced with a variety of challenges, such as costs, capacity, slots and pricing, among others.	Explore challenges constraining the aviation industry, including air service agreements between countries, routing, capacity and load factors, slots, pricing, aviation licensing, as well as cost input for airlines with the purpose of making recommendations on how to address the challenges.	• National Tourism Sector Strategy • Tourism Sector Master Plan
	Visas	Challenges exist regarding the fundamentals of traveller accessibility, including the need for enhanced ease of travel facilitation for visas required for growth tourism markets, lack of a coherent approach to air access facilitation and air service development for the country, and limited air and land infrastructure to support accelerated air travel.	Investigate how visa requirements can be reduced for key growth source markets in collaboration with immigration authorities, and introduce e-visa processes and other digital operations, where appropriate.	
			Investigate how visa regime amendments impact the tourism sector.	
			Examine visa facilitation best practices in order to draw lessons on how the country can create a good balance between regulatory international thorough visa regimes while promoting tourism.	
Tourism sector demand and supply	Meetings and events recovery, resilience and sustainability	Countries around the world are focusing on developing the meetings, incentives, conferences and exhibitions (MICE) subsector as part of their economic recovery strategies. Organisers use destination brand, and their credibility and ability (tangible and intangible resources) to host and organise meetings and events, and attract more resources to develop destinations. Meetings and events have a significant role to play to drive tourism, particularly for South Africa as one of the destinations known for hosting mega events. In this context, it is important to understand the economic contribution of meetings and events, and the important role of positioning to attract tourism investment to the country.	Determine the economic contribution and geographical spread of the MICE subsector, with a view to presenting meetings and events as catalysts to attract investment for tourism development.	• National Tourism Sector Strategy • White Paper on the Development and Promotion of Tourism in South Africa • Tourism Sector Master Plan • Stakeholder consultations
			Assess the underlying barriers inhibiting growth in this subsector and benchmark South Africa against competitor destinations.	
		The MICE subsector in South Africa is one of the growing industries in the tourism sector. However, to further support and sustain its growth, the improved utilisation of commercial venues for conferences and meetings by organs of state must be encouraged.	Investigate the factors that contribute to the underutilisation of venues for conferences and meetings by state organs and propose ways in which state organs can improve the use of commercial venues for conferences and meetings.	

Research theme	Research focus area	Study context	Research purpose	Source
Tourism sector demand and supply	Sharing economy	The sharing economy consists of several subsectors, such as the hospitality industry, which involves platform workers. Platform work has changed the way people and travellers, in particular, access and experience hospitality services, offering convenience, choice and flexibility, while presenting new opportunities and challenges for service providers, labour, consumers and regulators. For instance, platform work does not come with pension, sick pay, parental leave and holiday entitlement.	Assess the impact of platform work on the hospitality industry.	• Stakeholder consultation
	Management of disasters and pandemics	The global COVID-19 pandemic had a devastating impact on the tourism sector – it inflicted a debilitating blow against the tourism sector by transforming tourism patterns and discouraging travel. This sector has suffered enormously due to the imposition of lockdowns, travel bans and safety warnings. In order to combat such ramifications, there is a dire need for a crisis management framework. The White Paper on the Development and Promotion of Tourism in South Africa aims to introduce a crisis management strategy to manage and respond to crises.	Develop tourism crisis management frameworks to enable the sector to manage and respond to crises.	• White Paper on the Development and Promotion of Tourism in South Africa
			Monitor emerging market trends out of crisis and explore new products in line with available resources.	• Stakeholder consultations
Destination development and management	Transport infrastructure	Tourism, as an economic activity, relies on transportation to get tourists to their destinations. Therefore, an efficient transport system contributes positively to visitors' experience. However, in the case of South Africa, there are concerns that some transport modes are inefficient. This can limit access to South Africa's tourism facilities, which can have a negative impact on the sector's performance. Therefore, it becomes imperative to assess the state of this infrastructure in South Africa and to further benchmark it against that of other countries. This will assist government to establish where South Africa's transport infrastructure is ranked and how this infrastructure can be improved to ensure that it supports the current and future growth of the tourism sector.	Assess the state of the transport infrastructure and benchmark South Africa's tourism infrastructure against that of other developing countries.	• National Tourism Sector Strategy
			Examine how inefficient transport infrastructure affects the attractiveness of South Africa as a tourism destination and its impact on tourism businesses. The research will assist government to establish where South Africa's transport infrastructure is ranked and assist in identifying which transport infrastructure should be prioritised. It can also propose ways in which government can improve its transport infrastructure to support the tourism sector and sustain local tourism businesses.	• Stakeholder consultations
			Assess the feasibility of establishing a nationally driven air access strategy to coordinate and support the air service for tourism growth.	
	Infrastructure financing and governance model	The South African government is the main provider of public infrastructure. However, the private sector has also been financing such infrastructure. Nonetheless, there are concerns regarding the lack of synergy between national, provincial and local governments, as well as the private sector, on funding for tourism-related projects. Additionally, the funding models designed by national government do not suit the geographical areas in which tourism development should take place. Therefore, there is a need to develop a coherent funding model for tourism development. Lastly, there are some concerns regarding the governance model.	Examine how different spheres of government, as well as the private sector, could collaborate and develop a funding and governance model that is appropriate for tourism development.	• Stakeholder consultations
			Assess how other countries are funding and governing their tourism infrastructure, and document best practices. The findings will assist in ensuring the sustainable availability and allocation of funds in appropriate geographical areas.	

Research theme	Research focus area	Study context	Research purpose	Source
Destination development and management	Tourism-led local economic development	There is an increasing interest in tourists to explore off-the-beaten-path destinations. This presents an opportunity to stimulate local economies and improve access to services and infrastructure through rural tourism. However, the absence of tourism from the sectoral plans of some local municipalities indicates a gap in integrated development planning, which results in missed opportunities for local economic development.	Investigate the barriers that have historically hindered integrated development planning and outline effective tourism plans and how they can be incorporated into broader municipal planning frameworks to support the tourism sector, as well as the wider community.	• Stakeholder consultations
	Route development	Tourism routes are a way to diversify the offerings of a destination. Through the configuration and structuring of resources and services, tourism routes can constitute an experience that considers the motivations, interests, expectations and perceptions of visitors. In the South African context, tourism routes could be developed to offer unique features and experiences of the area, and create socio-economic benefits for local communities.	Investigate how route development initiatives can be enhanced, taking into consideration technological advancements such the use of mobile apps that are often used for route planning.	• White Paper on the Development and Promotion of Tourism in South Africa • Tourism Sector Master Plan • Stakeholder consultations
			Explore how tourism routes could be leveraged beyond their potential to enhance visitor experience to increase the competitive advantage and create socio-economic opportunities for local communities.	
	Product development and enhancement	Destinations depend on their primary tourism products as key pull factors to motivate tourists to visit them. While product development may create a new experience, expanding or enhancing an existing product could improve visitor experience. There are under-utilised spaces and facilities in the country that could be repurposed and enhanced for tourism opportunities.	Examine how under-utilised facilities such as farms could be redesigned and diversified to create opportunities for tourism development.	• White Paper on the Development and Promotion of Tourism in South Africa • Tourism Sector Master Plan • Stakeholder consultations
	Intra-African tourism	The COVID-19 pandemic exposed some of the risks associated with over-dependence on international tourists, and therefore emphasised the need to develop and promote intra-African tourism as an approach to sustainable tourism for South Africa. Africa presents opportunities for South Africa, as it consists of a youthful population, increasing average income levels, and a growing middle class with disposable income to engage in tourism. While the broader continent offers South Africa immense opportunities for tourism growth, this potential has yet to be fully exploited.	Profile key African tourism markets to identify the future demand-oriented drivers of intra-African tourism to primarily promote sustainable leisure-oriented tourism.	• Stakeholder consultations
	Urban tourism	Urban tourism has attracted growing research in the context of cities in the developed world and is linked to economic regeneration and development. As in the case of South Africa, Johannesburg was once traditionally known as a top tourist attraction due to its infrastructure. However, over the years, the inner city has experienced decay in its infrastructure, resulting in abandonment and the illegal occupation of many sites. Revitalising the inner city would restore its attractiveness and stimulate economic development.	Investigate the factors that contribute to the decline of inner cities' infrastructure with the purpose of proposing strategies on how inner cities can be revitalised to improve their attractiveness, with the aim of positioning them as economic tourism hubs, thereby stimulating local economic development.	• Stakeholder consultations

Research theme	Research focus area	Study context	Research purpose	Source
Destination marketing	Domestic tourism	The literature on domestic tourism shows that it is constrained by a variety of factors. High among these is the low demand by local tourists due to low incomes, among other things.	Investigate market segmentation in the domestic market with a view to developing strategies for segments with potentially high revenue.	• National Tourism Sector Strategy • Tourism Sector Master Plan • Stakeholder consultations
			Investigate methods of unlocking tourism potential in municipal border towns, focusing on identifying challenges and opportunities for local economic development.	
			Assess and apply the Domestic Tourism Remodelling Model across selected provinces.	
			Assess the factors that contribute to South Africans not travelling, with a focus on developing potential price differentiation strategies as tools to stimulate domestic travel.	
	Market trends	Tourism trends, including changes in markets, travel behaviour and the role of social media, increase the importance and need for tourism data. This data is crucial to inform the development of new products and services. However, the complexities in collecting and accessing reliable tourism data poses a challenge to understanding and measuring performance at subnational levels.	Develop a framework for collecting reliable tourism market trends across provinces and local levels to inform planning and tailor-made marketing strategies.	• Stakeholder consultations
			Develop a framework for improved reporting by accommodation, transport and other platform enterprises within the sector tourism to ensure access to relevant information on services provided in South Africa.	
	Competitiveness	Destination positioning identifies the competitive advantage of the destination, selects the target markets and establishes a unique value proposition. For a destination to remain competitive, it must be positioned in the mind of the tourist by eliciting their perception of that destination. South Africa is falling behind in its position, and as such, there is a need to understand how potential tourists perceive the country as a tourism destination.	Assess tourists' perceptions regarding South Africa's competitiveness in terms of service quality, and determine the drivers of change to improve and sustain South Africa's competitive position as a tourism destination. The research will assess brand awareness, service quality and customer satisfaction.	• Stakeholder consultations
			Investigate how national tourism quality standards and structures can be enhanced for improved customer satisfaction and experience.	
	Tourist experience	Improving tourists' experiences is important to support repeat visits. Some of the factors that influence tourists' experiences are adequate municipal services such as the provision of clean drinking water and refuse removal. Furthermore, the proper maintenance of recreational facilities like parks and stadiums can ensure that such recreational facilities remain in a good state and thus improve visitors' experiences and inspire repeat visits. However, there are concerns that some recreational facilities and municipal services are deteriorating, which could have an undesirable effect on visitors' experiences.	Assess the extent to which poor municipal services impact on tourists' experiences and the effects they have on repeat visits. This will assist in understanding the extent to which the lack of the provision of basic services impacts on tourism, and in developing strategies to mitigate them.	• Stakeholder consultations

Research theme	Research focus area	Study context	Research purpose	Source
Niche tourism	Cultural tourism	The richness and diversity of cultural and heritage attractions offer strong competitive advantages in attracting potential visitors. The attractiveness of South Africa lies in its diverse cultural resources, varied landscape, national parks, climate conditions and indigenous languages. However, there are many cultural and heritage products that are not efficiently utilised for tourism purposes. In addition, there are concerns about the decline in international tourists visiting cultural, heritage and historical sites and the low demand from domestic tourists.	Explore how cultural and heritage products can be diversified and improved, taking into consideration changing consumer demand, particularly in rural areas, for tourism, with a view to increasing geographical spread to rural or least-visited areas.	• White Paper on the Development and Promotion of Tourism in South Africa • Stakeholder consultations
			Investigate factors that drive international tourists in areas of cultural sites, as well as the low levels of demand from domestic tourists, and propose ways of addressing the challenges.	
	Community-based tourism (CBT)	Tourism worldwide is highly recognised for its economic potential and contribution to poverty alleviation. However, tourism benefits seldom filter down to surrounding communities. As tourists are now looking for authentic and unique experiences that create benefits for local communities, the South African tourism sector should look into diversifying towards more community-based tourism products and services; thus, ensuring inclusive economic growth and community beneficiation in tourism.	Investigate how to mainstream, facilitate and promote community-based tourism. The findings could be used to inform interventions on how to up-scale and increase the scope of community involvement and participation in tourism as a way to alleviate socio-economic challenges.	• White Paper on the Development and Promotion of Tourism in South Africa • Stakeholder consultations
			Explore the diverse operating models of CBT projects with the view to improve the success rate and sustainability of the CBT projects. The research study will further provide insights and recommendations on the functionality and structures of operating models of CBT projects.	
	Indigenous communities and tourism	The indigenous story teller (IST) refers to an individual who belongs to an identifiable indigenous community, which has a shared origin, history, culture and tradition. Usually, the IST is connected to or resides in a particular region, setting or landscape to which they have a specific affinity. The IST can relate or share stories pertaining to their specific community's identity, heritage, history, culture and geographic context. However, the management of indigeneity within the tourism sector has, for many decades, been a matter of grave concern globally.	Pilot the IST within the South African tourism landscape	• Stakeholder consultation
	Tourist guiding	Tourist guides are some of the key frontline players in the tourism sector. A tourist guide can be a pioneer who stops at certain places amid guided experiences, performs a mix of drilled and extemporises ceremonies, shows the way, focuses on specific aspects, tells tourists what to look at and where to position themselves to see the interest of the attractions as a whole. They are crucial when it comes to educating tourists about the preservation of natural sites and natural resources. However, tourist guiding remains complex and underrated.	Assess and augment the existing tourist guiding qualification framework and hierarchy.	• Stakeholder consultations
	Township tourism	Township tourism has emerged as a phenomenon that offers products and services that are of rich culture and heritage. These products and services include traditional cuisine, historical and cultural sites, and local arts and crafts. It is often performed through guided tours to enrich the tourism experience. In the context of South Africa, more can still be done to uplift township tourism and stimulate local economic development.	Assess factors that drive township tourism and document best practices. Further explore how township tourism can be elevated to stimulate local economic development. The study can additionally establish opportunities for local residents to enhance their products and services.	• White Paper on the Development and Promotion of Tourism in South Africa • Stakeholder consultations

Research theme	Research focus area	Study context	Research purpose	Source
Niche tourism	Rural and events tourism	Rural tourism consists of leisure activities carried out in rural areas. Rural tourism in South Africa has the potential to increase the participation of the poor in the tourism value chain and bring wider benefits to rural areas. However, rural tourism is yet to achieve its full potential, and rural tourism products are not well developed. In relation to events tourism in rural areas, there are concerns that there are various challenges impeding the growth of events tourism in rural areas.	Determine how rural tourism products and services, including events, can be developed and/or enhanced, with the aim to propose an actionable strategy for each province to drive rural tourism.	• National Tourism Sector Strategy • White Paper on the Development and Promotion of Tourism in South Africa • Stakeholder consultations
			Develop a tourism asset mapping methodology or guide for the rural context.	
			Investigate the factors that constraint events tourism in rural areas and propose strategies to address these challenges.	
	Medical tourism	The South African government intends to introduce the National Health Insurance (NHI), which intends to realise universal health coverage for all South Africans. The introduction of the NHI is expected to have implications on some sectors, particularly medical tourism. However, there are some uncertainties regarding the potential impacts of the NHI on medical tourism.	Investigate the potential impact of the NHI on medical tourism in South Africa.	• Stakeholder consultation
	Eco/adventure tourism	Ecotourism is one of the tourism subsectors that has a huge impact on biodiversity and conservation. Moreover, local communities are land owners and, in certain instances, want to participate in the ecotourism subsector as owners of such facilities. For the communities to participate meaningfully in the subsector, it is essential to understand economic dynamics such as contribution to GDP, jobs created, ownership of ecotourism facilities, challenges and opportunities.	Examine the socio-economic benefits of ecotourism and barriers to growth on local communities with a view to developing and implementing interventions that will contribute to transformation objectives and community involvement, while achieving conservation targets.	• Stakeholder consultations
	Geo-tourism	Mining sites with geo-scientific, industrial, cultural, aesthetic, historic and anthropological characteristics can be utilised for the development of tourism. A number of post-mining rehabilitation guidelines have been produced to ensure a satisfactory and sustainable end-product. In particular, Section 38(1) of the Mineral and Petroleum Resources Development Act (MPRDA) of 2002 refers to having the mine area restored to its natural or predetermined state. This would result in job creation, which is one of the key requirements of the rehabilitation project and could subsequently contribute to one of the priorities of the National Development Plan.	Determine how closed mine shafts can be rehabilitated for tourism development to benefit local communities.	• Stakeholder consultations

Research theme	Research focus area	Study context	Research purpose	Source
Innovation and technological advancement	Digital network infrastructure	Digital technology is an essential and integral part of many businesses worldwide, enabling the enhancement of major economic segments and markets to improve their capabilities. As in the case for tourism, digital technology is seen as the driving force of innovations in the sector. In South Africa, the lack of digital technology adaptability and network infrastructure hinders the inclusion of SMMEs in the tourism value chain.	Assess the digital landscape and network infrastructure in South Africa to understand the challenges and potential benefits for the tourism sector, including SMMEs. The findings should inform policy and technological interventions for the tourism sector, including SMMEs, and foster inclusive digital development in South Africa.	• National Tourism Sector Strategy • Tourism Sector Master Plan • Stakeholder consultations
	Digital transformation for innovative strategies	Technological advancement and digitalisation in the tourism sector have become important for the continued development and growth of the sector, particularly for SMMEs. Since the inception of innovation and technological advancement in the tourism industry, SMMEs have been at the forefront of adopting technological advancement in its different sectors to make bookings and for administration to improve their customer services and experience. Therefore, for destinations to remain competitive and for sustained growth, there is a need for digital transformation and the use of innovative strategies within the tourism sector.	Examine digital transformation and innovative practices in tourism SMMEs and offer practical frameworks for barriers to the adoption of digital technologies; aligning digital marketing strategies with customer needs and expectations; enhancing the customer experience; improving the effectiveness and efficiency of marketing strategies; stimulating economic growth related to tourism; and improving destination competitiveness and policy development.	• Stakeholder consultations
			Investigate the tourism SMME digital technology adoption landscape in South Africa and the potential innovation opportunities to enhance their development, growth and sustainability.	
	Artificial Intelligence and robotics	Artificial Intelligence (AI) and robotics are among the various technologies being integrated into the tourism sector to improve customer services and experiences. This technology advancement is used by tourism destinations and facilities to gain a competitive advantage in the dynamic market. To remain competitive, the South African tourism sector needs to keep abreast and integrate the technological innovations to enhance the overall tourist experience.	Explore how the South African tourism sector is adopting AI and robotics, and examine the challenges faced, as well as opportunities.	• White Paper on the Development and Promotion of Tourism in South Africa • Stakeholder consultations
			Explore how to integrate digital technology into the curriculum to achieve collaboration and coordination between technology and students to produce an innovative workforce.	
	Cyber security	Digital technologies can support and accelerate the achievement of the 17 Sustainable Development Goals – from eroding extreme poverty to promoting sustainable tourism and decent work, and achieving universal literacy. Nonetheless, technologies can also threaten privacy, erode security and fuel inequality. South Africa is no exception to this as there has been a growing concern of tourists being scammed on a daily basis and losing money through bogus online travel companies.	Examine and measure the levels of cyber security challenges in the sector to develop regulatory frameworks for government to protect tourists and monitor cyber services within the tourism sector.	• Stakeholder consultations

Research theme	Research focus area	Study context	Research purpose	Source
Responsible tourism	Universal accessibility	Participation in tourism activities is influenced by a wide variety of factors, including personal, social and environment factors. In the case of people who have physical limitations or special needs, the decision-making process to travel and engage in tourism activities, either as tourists or as employees, is largely influenced by the sector's capacity to respond to their special needs and requirements. As such, addressing the barriers and constraints of accessibility could facilitate full inclusivity and participation in the tourism sector.	Investigate barriers or constraints experienced by people living with disabilities during travel, with a view to developing universally accessible and inclusive tourism products and services for all market segments.	• National Tourism Sector Strategy • White Paper on the Development and Promotion of Tourism in South Africa • Stakeholder consultations
			Measure the extent to which the tourism sector caters for employees living with disabilities. This can assist in positioning South Africa as an inclusive destination, with the added advantage of attracting and creating employment opportunities for people living with disabilities.	
	Circular economy	The circular economy is seen as a new source of growth and represents a dynamic avenue for fostering economic rejuvenation, facilitating a just transition and unlocking significant socio-economic prospects. For tourism destinations, the circular economy offers the opportunity to enhance the sustainable development impacts of tourism, generating wellbeing for the local population through employment creation. For tourists, the circular economy brings an opportunity to leave a positive footprint and to travel with purpose, and can lead to multiplier effects when it comes to the transformation of the whole tourism ecosystem through behaviour change. Therefore, the integration of circularity and the enhancement of resource efficiency within the tourism value chain is important to steer the sector towards a path of sustainable and resilient growth.	Investigate the circular economic transformation pathways that are applicable to tourism in South Africa. This will include transport, tourist activities, food and beverages, as well as accommodation.	• Stakeholder consultation
			Assess the South African tourism sectors' readiness to tackle such pathways with the goal of facilitating the transition towards a circular economy within the tourism sector.	
			Examine global food waste reduction in the tourism framework and other successful international case studies to identify strategies that could be adapted for South Africa.	
	Sustainable tourism	To compete in a changing environmental and socio-economic landscape, businesses have to engage in sustainability or green tourism initiatives that have the potential to influence travel decisions and attract tourists. Studies have shown that tourists prefer to choose destinations that have minimal environmental impacts and demonstrate clear socio-economic benefits flowing to local communities. However, the majority of tourism businesses are still focused on consumerism, and are therefore unable to compete or attract tourists.	Determine the contribution of the tourism sector to the national greenhouse gas (GHG) emissions and investigate the constraints that impede tourism businesses from integrating sustainable practices in their operations, with a view to developing interventions to encourage businesses to be more environmentally friendly, thus attract more tourists.	• National Tourism Sector Strategy • White Paper on the Development and Promotion of Tourism in South Africa
			Assess the environmental legislation compliance of capital projects funded by government, such as environmental authorisations and compliance.	
	Climate change	Tourism is sensitive to climate change, which affects the frequency and nature of participation in tourism activities. Recently, South Africa has been severely affected by natural disasters. These lead to the closure of roads, tourism businesses and facilities. As such, there is a need for the sector, specifically local municipalities, to better understand the impacts and consequences of climate change and how to respond to it.	Determine the capacity of local municipalities to address the impact of growing climate change, such as floods, heat waves and drought, and propose ways in which climate change challenges can be addressed.	• Tourism Sector Master Plan • Stakeholder consultations
			Investigate how other countries are addressing climate change challenges and document best practices.	
			Assess the dangers that climate change poses to the sector and propose policy recommendations on how dangers associated with climate change can be addressed.	

Research theme	Research focus area	Study context	Research purpose	Source
SMME development and transformation	SMME development	SMMEs have been identified as a key component to advance inclusive growth and development in South Africa. In the National Development Plan, the South African government indicates the importance of SMMEs for job creation, innovation and competitiveness. The successful entry, growth and sustainability of black-owned SMMEs can create a sustainable mechanism through which transformation can be advanced. It is for this reason that the South African government has developed various support packages for SMMEs. However, despite these support packages and interventions, only a few SMMEs, including community projects, are able to reach sustainable growth or have made sustainable use of the benefits of the transformation initiatives.	Unpack barriers that remain restraints for SMMEs to access finance and markets that can impede their growth and development, and propose measures to address these barriers.	• National Tourism Sector Strategy • White Paper on the Development and Promotion of Tourism in South Africa • Tourism Sector Master Plan • Stakeholder consultations
			Investigate tourism demand and supply within the private sector tourism value chain with a view to improving the participation of emerging black-owned tourism enterprises.	
			Map new business opportunities and emerging subsectors within the tourism value chain to inspire new innovations and entrepreneurial development.	
			Investigate the factors that constrain SMME development in the tourism sector, particularly black-owned enterprises, and propose policy interventions that will enable entrepreneurship and improve ease of doing business for SMMEs.	
	Transformation	SMMEs are key drivers of economic growth, innovation and job creation. Therefore, a flourishing SMME sector is critical for transformation and the correction of historical wrongs.	Develop frameworks for concessions to promote transformation through the use of public-owned tourism assets.	• National Tourism Sector Strategy • Tourism Sector Master Plan • Stakeholder consultations
			Determine the impact of government support on transformation for SMMEs, including community projects, with a view to develop innovative strategies to enhance support and interventions to SMMEs and community projects.	
			Assess how the sector could develop emerging tourism entrepreneurs as a way to aid communities that have been affected by unemployment and poverty.	
			Investigate how the transformation framework for the sector can be improved to better incorporate previously disadvantaged groups, including black women.	
	SMME funding mechanism	SMMEs in South Africa are faced with a variety of challenges. High among the challenges is access to funding. Nevertheless, there is a growing concept that self-help initiatives such as stokvels can be utilised as an investment tool, particularly for women to become entrepreneurs in the tourism sector.	Explore how the sector can develop strategies on how money generated from stokvels can be used as a source of start-up capital for SMMEs, particularly women-owned SMMEs. This could enhance the capacity and skills to operate sustainable tourism businesses using stokvels as an investment tool, and further support transformation.	• Stakeholder consultations

5. Completed research studies
2012/13–2023/24

The Department of Tourism has conducted and completed numerous research studies in collaboration with universities between the 2012/13 and 2023/24 financial years. Table 3 depicts the completed research studies.

Table 3: Competed research studies per financial year: 2012/13 to 2023/24

2023/24
- The impacts of electricity cuts on tourism business in South Africa: Accommodation establishments as a case study
- Perceptions of the influence and effectiveness of the tourism accommodation grading system in South Africa
- An assessment of the tourism accommodation grading system in South Africa: A demand and supply perspective
- Participation of previously disadvantaged groups in the tourist guiding subsector: Assessing barriers and opportunities
- Recognition and integration of indigenous story tellers in the tourist guiding subsector

2022/23
- The piloting and refining of the domestic tourism remodelling model
- The piloting and refinement of the domestic tourism recovery framework
- The piloting and refinement of the tourism resilience model

2021/22
- Re-modelling the local domestic tourism market in South Africa within a COVID-19 environment
- Re-examining perspectives on the recovery of South Africa's domestic tourism in a COVID-19 environment
- Tourism resilience model for sustainable sector demand and supply
- Transformation of South African tourism value chain towards sustainable and resource efficient, and inclusive growth path post-COVID-19
- Stimulating sector demand and supply through niche tourism development

2020/21

- Impact of COVID-19 on tourism-transport interface
- Impact of COVID-19 on tourism sector demand and supply

2019/20

- An assessment of the impact of mega trends in the tourism sector
- An analysis of the public sector expenditure in the tourism value chain: Identifying socio-economic opportunities for black-owned enterprises in South Africa
- Leveraging state-owned tourism assets for black small, medium and micro enterprises development: A case of state-owned parks, lodges and attractions

2018/19

- An assessment of the impact of mega trends in the tourism sector (Phase 1)
- Indigenous story tellers: Northern Cape as a case study
- Cross-border themed tourism routes in the southern Africa region – practice and potential
- An analysis of socio-economic opportunities in the tourism value chain
- Leveraging state-owned tourism assets for black small, medium and micro enterprises development: A case of state-owned parks, lodges and attractions (Phase 1)
- Development of a framework to assess the economic impact of coastal and marine tourism in South Africa (Phase 3)

2017/18

- Demand and supply market analysis for destination development
- A policy review of the tourist guiding sector in South Africa
- Sustainability of rural tourism products in South Africa: A case study of selected tourism products
- Understanding the employment profiles within the tourism hospitality subsector
- Development of a framework to assess the economic impact of coastal and marine tourism in South Africa (Phase 2)

2016/17

- Destination development through understanding tourists' expectations and memorable tourist experiences at major tourist attractions
- The potential of the creative industry for destination development in South Africa: Film tourism as a case study
- Interventions and incentives needed to improve the number of enterprises, including state-owned tourism attractions, that embrace responsible tourism management practices
- Tourism value chain and opportunities for transformation in South Africa
- Development of a framework to assess the economic impact of coastal and marine tourism in South Africa (Phase 1)
- The governance and coordination involved in coastal and marine tourism: Challenges and opportunities
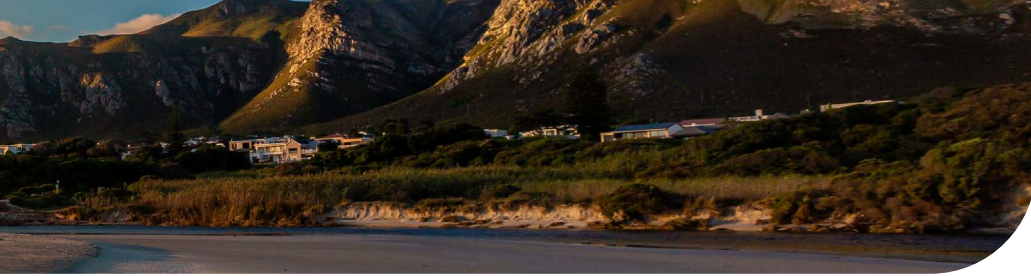
2015/16

- Regional competitiveness: An emerging domestic market segment perspective
- Harmonised tourist guiding in southern Africa
- Local economic development: The case of tourism events
- Customer Service Satisfaction Index for the accommodation sub-sector in South Africa
- Development of a framework to measure the impact of events (Phase 3)
- The impact of community-based tourism projects on local communities in KwaZulu-Natal

2014/15

- A model to measure South Africa's tourism competitiveness (Phase 2)
- Harmonisation of tourist guiding training standards in southern Africa (Phase 2)
- The socio-economic impact of religious tourism on local communities in Limpopo: A case study (Phase 2)
- Customer service satisfaction levels at tourist attractions in South Africa (Phase 2)
- Development of a framework to measure the impact of events (Phase 2)

2013/14

- A model to measure South Africa's tourism competitiveness (Phase 1)
- Harmonisation of tourist guiding training regulations and standards in southern Africa (Phase 1)
- The socio-economic impacts of religious tourism on rural communities in Limpopo: A case study (Phase 1)
- Customer service satisfaction levels at tourist attractions in South Africa (Phase 1)
- Development of a framework to measure the impact of events (Phase 1)
- Planning, development and management of tourism resource facilities and activities in municipalities in three provinces

2012/13

- Analysis of the supply of tourism products for the five key domestic market segments
- Understanding the concept of cross-border guiding in southern Africa
- Socio-economic impact of sporting events on rural communities: A case study
- Customer service satisfaction levels of domestic tourists at accommodation establishments in South Africa
- Governance and regulation of subvention funds study
- Socio-economic impact of rural tourism routes on adjacent communities: A case study

6. Implementation
of the Tourism Research Agenda

One of the major challenges in tourism research is the general lack of cooperation and collaboration among different stakeholders, often resulting in resource wastage and duplication of efforts. Furthermore, existing research is not always useful to address the needs of key stakeholders. It is for these reasons that the Department of Tourism prioritises partnerships in respect of tourism research. The implementation of the Tourism Research Agenda: 2024/25–2026/27 will therefore be undertaken in partnership with public institutions of higher education (defined in the Higher Education Act 101 of 1997, as amended) and research institutions (as listed in Schedule 3 of the Public Finance Management Act 1 of 1999) that responded to the Department's call for expression of interest to form part of a research panel for a period of three years, from the 2024/25 to 2026/27 financial years.

The research panel would allow the Department to draw relevant and diverse expertise and skill sets from public higher education and research institutions to implement the research agenda with a view to the following:

» Increase the role of scientific and applied research in government planning and decision making to facilitate the growth, recovery and sustainability of the tourism sector

» Increase evidence-based knowledge generation and quality research outputs

» Promote multidisciplinary research with tangible outcomes and actionable recommendations

The partnership between the Department and institutions is governed through Memoranda of Agreement (MoAs) signed for three years (2024/25 to 2026/27) and aligned to the period of implementation of the research agenda. Institutions additionally sign service-level agreements (SLAs) for specific priority research studies to be undertaken in a particular year.

The budget to conduct research studies is allocated each financial year during the implementation of the research agenda and is aligned to the Department's annual performance and operational plans. The Department is, however, not in a position to fund all the research studies in the Tourism Research Agenda; hence, it calls for research funding and investment by research institutions, universities, foundations, development agencies, tourism associations, provincial and local government research units and other bodies in any of the areas listed in the Tourism Research Agenda.

To implement the Tourism Research Agenda, the Department further encourages other stakeholders in the tourism sector, including students, to undertake some of the research studies outlined in the Tourism Research Agenda.

7. Dissemination
of research information

The value of research is not fully realised until the research findings are disseminated to the wider audience. In this way, research outputs are best utilised when they are accessible to sector stakeholders, who may consider the research outputs and outcomes, and apply them to maximise the usefulness and utility of the research, thus translating research into practice.

The dissemination of research findings and outcomes, although considered the last step in the research process, is also the first step in the path towards translating knowledge into practice. Thus, the Department considers the dissemination of research findings as an important step in the research process. As such, final research outputs are disseminated through various platforms, including the annual Tourism Research Seminar, workshops, conferences, emails and the Department's **Integrated Knowledge Management System: Research Repository**.

8. Conclusion

The Department is committed to promoting the generation, management, dissemination and utilisation of evidence-based information and knowledge to inform planning, policy, strategies, programmes and decision making within the tourism sector. The Tourism Research Agenda reflects the Department's commitment to encourage cooperation and collaboration in tourism research to contribute to the generation of high-quality, timely, consistent and evidence-based information and knowledge that is useful to address the needs of tourism stakeholders.

The Tourism Research Agenda outlines priority research studies to be conducted during the 2024/25–2026/27 financial years. It is by no means comprehensive or exclusive. It should therefore be viewed as a strategic document that will be reviewed and updated regularly in consultation with tourism stakeholders to respond to new developments and research priorities within the tourism sector.

> **The Tourism Research Agenda reflects the Department's commitment to encourage cooperation and collaboration in tourism research to contribute to the generation of high-quality, timely, consistent and evidence-based information and knowledge that is useful to address the needs of tourism stakeholders.**

Tourism Research Agenda

Advancing Tourism Growth, Development and Sustainability Through Evidence-Based Research

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