

National Department of Tourism

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Assessing the management, maintenance and sustainability of State-owned Tourism Assets in South Africa



By



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# Presentation Outline

- Study background and objectives
- Methodology Applied in the Study
- Key Findings and Insights
- Actionable Recommendations
- Strategic Alignment
- Challenges and Possible Solutions
- Key Components of the IMSM
- Conclusion

# Purpose & objectives of the study

- The study sought to assess the management, maintenance and sustainability of state-owned tourism assets in South Africa and identify a best-fit model that may be adopted by the government.
- Identify and analyse business models on the assessment, management, maintenance and sustainability of state-owned tourism assets and establish best practices thereof.
- Assess the management, maintenance and sustainability of state-owned tourism assets in South Africa with a particular focus on their contribution to income generation, job creation and local economic development.
- Identify partnerships to leverage for the management, maintenance and sustainability of state-owned tourism assets in South Africa.
- Provide actionable recommendations on the best-fit model for the state to adopt in order to maximise its efforts towards the management, maintenance and sustainability of state-owned tourism assets.

# Research Methodology: A Mixed-Method Approach

## Data Collection

- Quantitative and qualitative data
- Government and Municipal officials
- Asset managers (parks, museums, heritage sites)
- Local communities
- Private businesses
- Environmental groups and academics

## Research Techniques

- Desktop literature review (national and international)
- Management models review
- Sustainability frameworks analysis
- Stakeholder analysis
- Case studies (heritage sites and museums)
- Focus group discussions (FGDs)

## Analysis Methods

- SWOT analysis of state-owned entities
- Sustainability Assessment Frameworks
- Socio-economic assessment
- Environmental assessment
- Trend analysis (secondary data)
- Statistical analysis (financial and performance data)

# Results

## Demographic Profile of Stakeholders

### Age Distribution

21-30 years	16.3%
31-40 years	Mid-career
41-50 years	Senior roles
51+ years	18.4%

### Gender Balance

Male Respondents	55.1%
Female Respondents	44.9%
Difference	10.2%
Balance Assessment	Inclusive

### Education Level

Postgraduate/Honours	40.8%
Master's Degree	26.5%
PhD	8.2%
Diploma/Certificate	22.4%

### Length of Service

Under 5 years	30.6%
5-10 years	Mid-career
16-20 years	22.4%
Over 21 years	16.3%

# Demographic Profile of Visitors

Part 1: Age, Gender, Education & Occupation

## Age Distribution

18–29 years	25.6%
30–39 years	24.4%
40–49 years	20.0%
50–59 years	17.4%
60–69 years	8.4%
70+ years	4.1%

## Occupation

Private/Business sector	43.7%
Public sector employees	16.0%
Students/Scholars	13.4%
Unemployed	9.7%
Retired	8.7%

## Gender Distribution

Female	50.6%
Male	48.9%
Non-binary	0.6%

## Education Level

Postgraduate degree	36.4%
Undergraduate degree	32.4%
Secondary school	25.1%
Primary school	3.1%
No formal education	2.9%

Place of residence, yearly income distribution, and comprehensive visitor composition insights.

# Demographic Profile of Visitors

Part 2: Residence & Income

## Place of Residence

South Africa

41.7%

Europe

25.1%

Africa (excl. SA)

14.6%

Americas

8.1%

Middle East

4.9%

East Asia

3.7%

## Yearly Income (USD)

Less than \$25,000

20.1%

\$25,001 – \$50,000

12.4%

\$50,001 – \$75,000

11.6%

\$75,001 – \$100,000

8.7%

\$100,000+

5.4%

Domestic visitors dominate at 41.7%, with Europe as the second-largest source market at 25.1%. Other international regions collectively account for approximately 20% of visitors. Income distribution shows that 20.1% of visitors earn less than \$25,000 annually, indicating affordability is a key factor. The combined lower three income brackets (less than \$75,000) account for approximately 44.1% of visitors, while upper brackets (\$75,000+) represent 14.1%, suggesting a diverse market with both budget-conscious and affluent visitor segments.

# State-Owned Entity Categories

## National Parks

32.7%

Strong emphasis on biodiversity conservation, large-scale ecotourism, and ecosystem services.

## Other Categories

22.4%

Diversification and potential definitional ambiguities warranting refinement for improved accountability.

## Protected Areas

14.3%

Critical buffers and community-based tourism anchors for integrated land management and co-governance.

## Historical, Cultural & Heritage Sites

10.2%

Reflecting the social dimension of tourism and the need for authentic experiences.

## Stakeholder/Service Provider

12.2%

Highlighting the importance of partnerships and service quality in the tourism ecosystem.

## Museums and Monuments

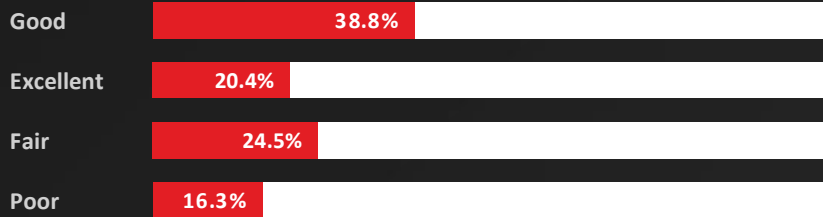
8.2%

Vital for cultural education and heritage preservation, requiring ongoing conservation investments.

# Infrastructure and Accessibility

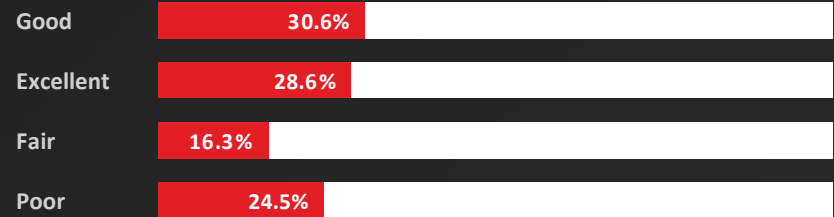
## General Infrastructure

Trails, Maintenance & Signage



## Accessibility

People with Disabilities



### Key Finding

Budgetary constraints and funding gaps are primary drivers of deterioration. Focused maintenance plan with adequate budgeting is required to restore excellence.

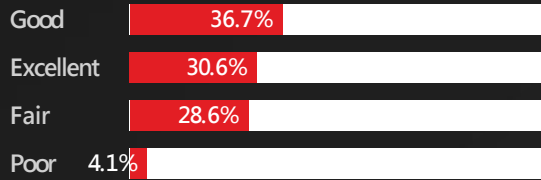
### Key Finding

Infrastructure needs enhancement to support safe, hassle-free travel and reliable access to tourism infrastructure, water, and sewage systems.

# Cleanliness, Hygiene, and Safety Findings

## Cleanliness

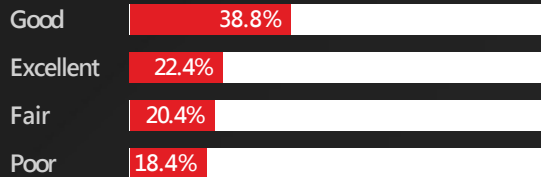
### Absence of Litter



#### Finding

Minimal litter in most facilities. Revamp needed across public spaces.

### Ablution Facilities

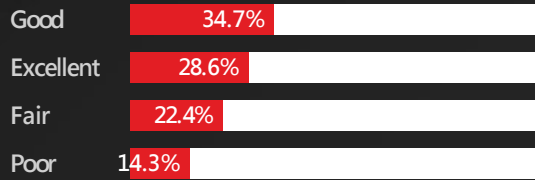


#### Finding

38.8% require improvement. Addressing fair and poor

## Safety

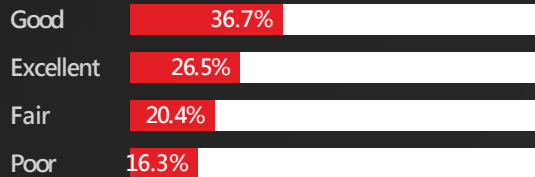
### Absence of Crime



#### Finding

34.7% present crime prevention initiatives. Enhanced security measures are needed for visitor confidence.

### Security Personnel

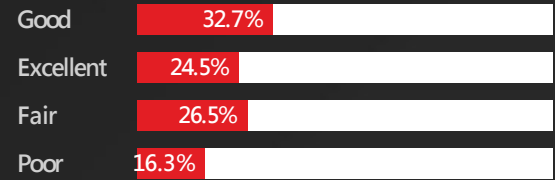


#### Finding

36.7% need improvement. Strengthen personnel

## Emergency

### Preparedness & Response



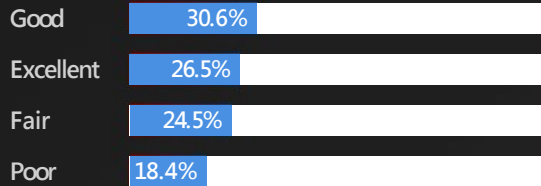
#### Finding

32.7% need enhancement. Improving emergency protocols is crucial for visitor safety and operational resilience.

While most areas maintain good standards (34.7% for crime, 36.7% for security), significant portions require targeted improvements to enhance visitor confidence and operational safety.

# Environmental Sustainability Findings

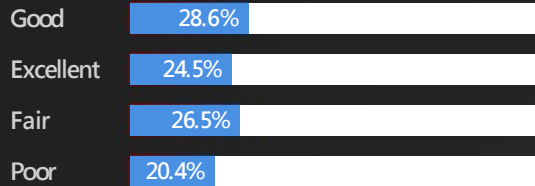
## Waste Management & Recycling



### Key Finding

30.6% requires improvement. Enhanced waste management and recycling initiatives are vital for environmental protection.

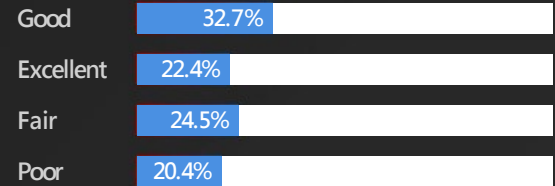
## Energy Efficiency & Conservation



### Key Finding

28.6% needs enhancement. Improving energy efficiency is crucial for reducing environmental impact and promoting sustainable operations.

## Water Conservation & Management



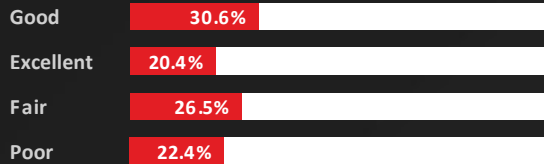
### Key Finding

32.7% requires improvement. Enhanced water conservation is vital for sustainable resource use and environmental resilience.

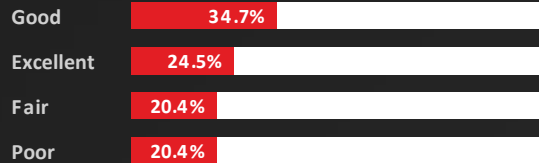
# Economic Viability and Community Engagement

## Economic Viability

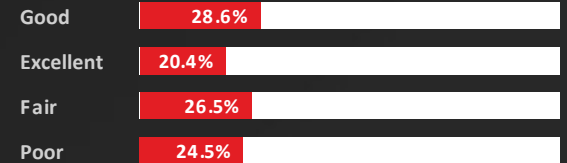
### Revenue Generation & Financial Sustainability



### Job Creation & Local Economic Impact

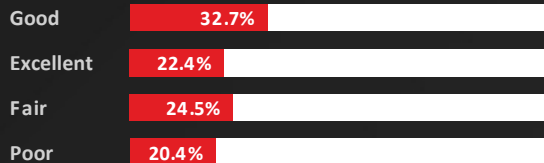


### Investment & Funding Opportunities

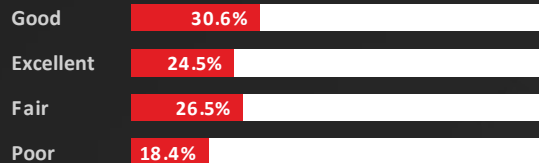


## Community Engagement

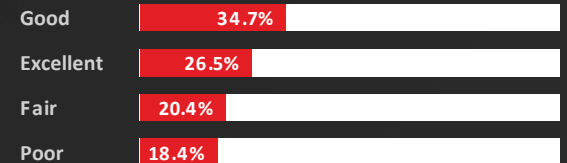
### Local Community Involvement



### Cultural Preservation & Promotion



### Visitor Education & Awareness



# Key Insights and Strategic Recommendations

48.9% of respondents rated revenue generation and financial sustainability as fair to poor, indicating significant challenges in financial viability.

Develop enhanced financial strategies including diversified revenue streams, improved pricing models, and cost optimization measures.

While 59.2% of areas showed positive economic contributions, 40.8% require improvement in job creation and local economic impact.

Implement targeted programs to boost local economic contributions through skills development, local supply chain integration, and community enterprise support.

Over 51% of respondents rated investment and funding opportunities as fair to poor, highlighting critical challenges in securing resources for infrastructure development.

Explore diverse funding mechanisms including public-private partnerships, tourism taxes, concession revenues, and international development finance.

40.8% of respondents rated marketing and promotion as minimum or poor, suggesting weak market segmentation, poor brand positioning, and ineffective campaigns.

Revamp marketing strategies with improved market segmentation, enhanced brand positioning, targeted digital campaigns, and data-driven analytics.

# Challenges and Concerns

## **Weak Integration and Limited Accessibility**

State-owned tourism assets lack integration with national and regional networks, limiting market reach and collaborative opportunities for sustainable development.

## **Diversity, Fragmentation, and Complexity**

The diversity and fragmentation of state-owned tourism assets present significant challenges regarding the framework for planning and management, hindering coordinated policy implementation.

## **Government Silos and Multi-Level Coordination**

The relationship between different layers of government (national, provincial, and local) creates silo effects, reducing coordination effectiveness and leading to duplicated efforts or gaps in service delivery.

## **Poor Transport Networks in Remote Areas**

Limited and deteriorating transport infrastructure in remote areas affects the flow of tourists and market integration, reducing accessibility to tourism assets and limiting economic benefits.

## **Local Deterrents and Safety Concerns**

# Integrated Management and Sustainability Model (IMSM)

*Strategic Alignment with G20 Tourism Priorities*

## Sustainability

Protected areas remain essential to sustainability, but their future hinges on our ability to adapt to rising pressures from tourism, social change, and conflict.

### Priority

Enhanced Resilience

## Innovation

Traditional carrying capacity models fall short in capturing the complexity of tourism dynamics. Modern approaches are essential.

### Priority

People-Centred AI and Innovation

## Solidarity

Effective planning requires embracing diversity, collaboration, and adaptive management across all stakeholder groups and governance levels.

### Priority

Collaborative Governance

## Equality

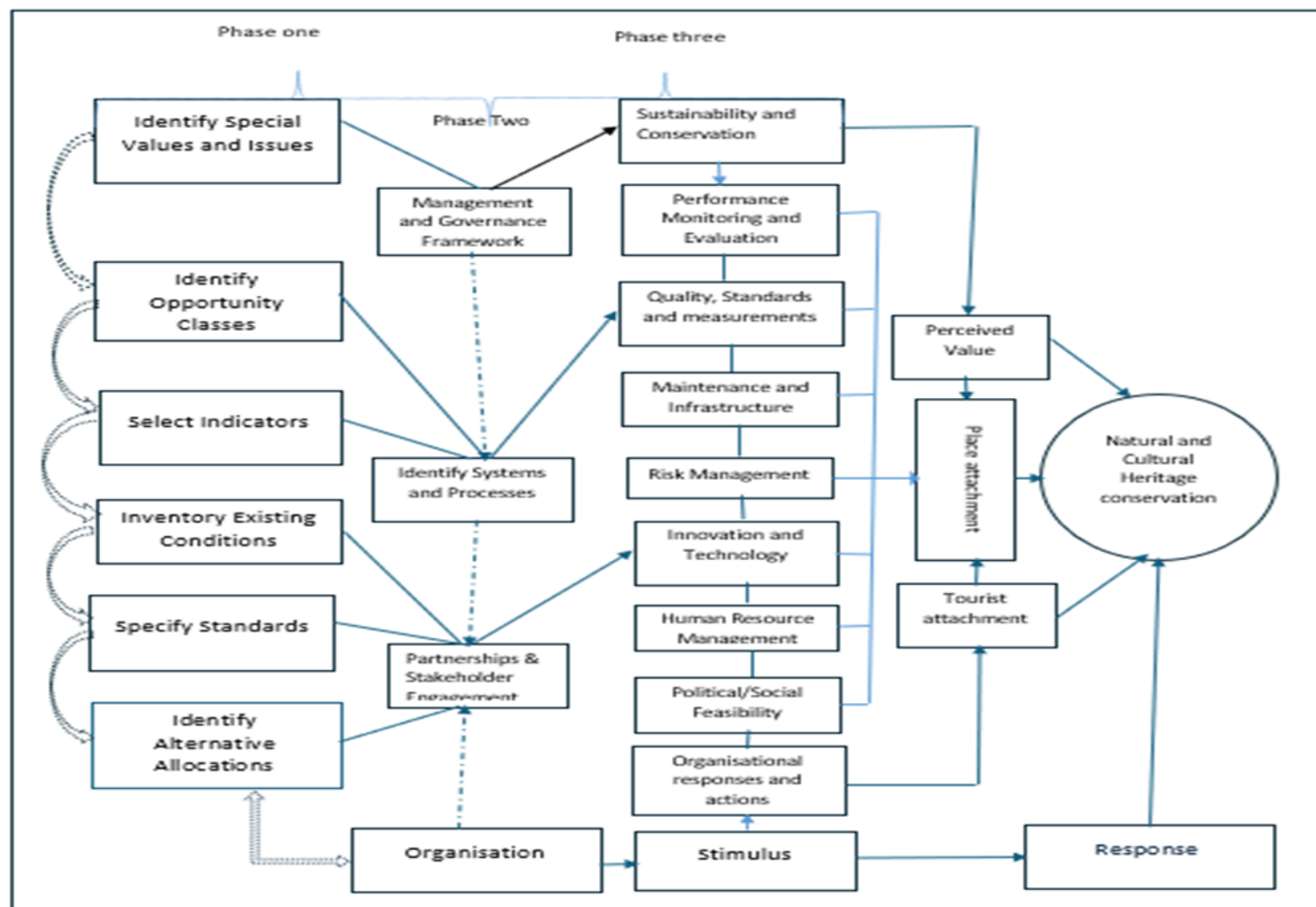
By adopting the IMSM, government can maximize tourism and its socio-economic benefits while preserving the integrity of tourism assets.

### Priority

Tourism Financing & Investment

The Integrated Management and Sustainability Model provides a comprehensive framework for managing state-owned tourism assets in South Africa. It integrates environmental conservation, social responsibility, economic viability, and governance excellence to create sustainable tourism destinations.

**Environmental Stewardship** Balancing biodiversity conservation with tourism development



# Conclusion and Key Takeaways

Part 1

This comprehensive study highlights critical areas for improvement in the management and sustainability of state-owned tourism assets in South Africa. By addressing financial, infrastructural, environmental, and social challenges through strategic recommendations and the proposed Integrated Management and Sustainability Model (IMSM), the government can significantly enhance the sector's long-term viability and contribution to the economy.

## Key Takeaways

Enhanced financial strategies and diversified revenue streams are essential for long-term viability of state-owned tourism assets.

Focused maintenance planning with adequate budgeting is required to restore and maintain safe, accessible tourism facilities.

Integrated environmental management practices are vital for sustainable tourism that preserves natural and cultural heritage.

Meaningful community engagement and equitable benefit-sharing are essential for sustainable and inclusive tourism development.

Next steps for implementing the IMSM framework and establishing continuous monitoring mechanisms.

# Implementation and Continuous Monitoring

*Next Steps for Sustainable Growth*

## Next Steps for Implementation

- 1 Adopt the IMSM Framework**  
Integrate the proposed Integrated Management and Sustainability Model into national and provincial tourism policies and strategic plans.
- 2 Establish Governance Structures**  
Create clear governance frameworks with transparent reporting mechanisms and equitable benefit-sharing arrangements.
- 3 Implement Continuous Monitoring**  
Establish quarterly monitoring and evaluation mechanisms to track asset condition, visitor numbers, economic impacts, and environmental indicators.

Regular assessment and adaptive management are essential for responding to evolving pressures and ensuring sustainable growth of South Africa's state-owned tourism assets. The success of this initiative depends on commitment to evidence-based decision-making and collaborative stakeholder engagement.

# Limitations

- Limited access to internal state data due to confidentiality, which constrains comparisons across sites.
- Inadequate accessible data collection methods (e.g., surveys not available in braille, sign language, or easy-to-read formats).
- Different forms of accessibility were not measured, and the online surveys were inaccessible to screen readers.
- Small or non-representative samples due to limited access to populations living with disabilities.
- The study did not explore in depth the accessibility of state-owned assets by people with different forms of disability.
- Low return rate for the stakeholders surveys due to the use of online surveys.



Thank you!



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