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Piloting and Refinement of the Domestic Tourism Recovery Framework for South Africa

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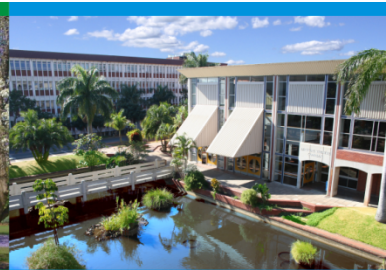
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Rationale, problem statement and purpose for Phase 2

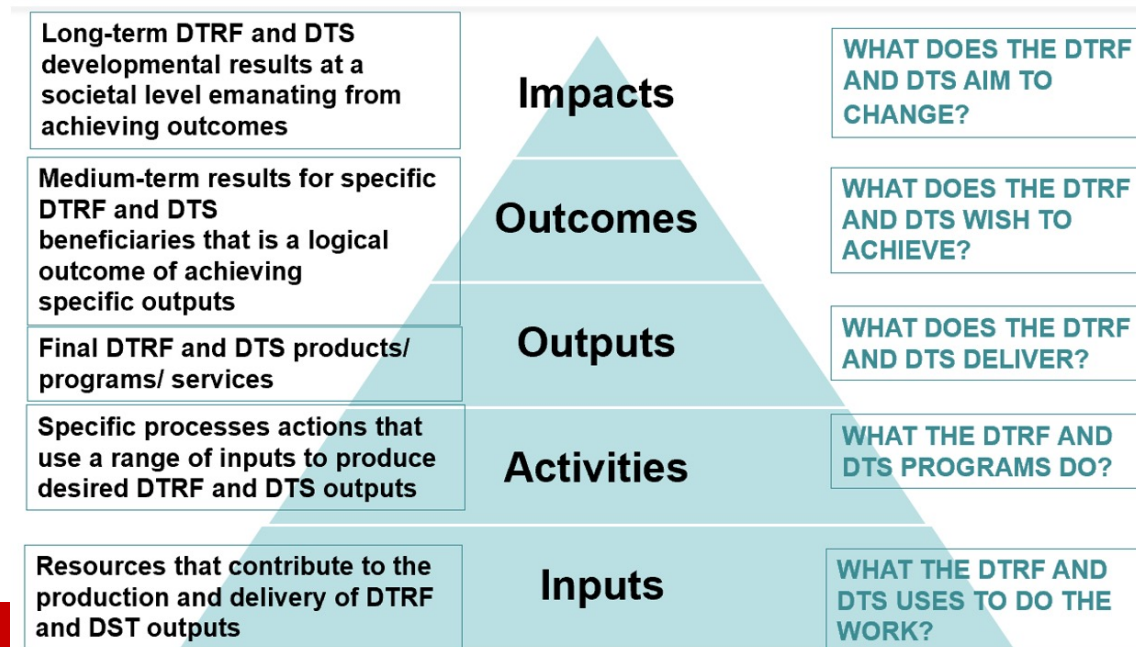
- Piloting and refinement of the proposed Domestic Tourism Recovery Framework developed in Phase 1 is important to:
 - Use the Domestic Tourism Scheme as a case study as a basis for the practical application and implementation of the Framework
 - Stimulate and respond to domestic tourism demand by partnering with tourism value chain stakeholders
 - Engagement with key stakeholders about the implementation of the Domestic Tourism Scheme in relation to promoting the recovery of domestic tourism in South Africa
 - Examination of practical and operational issues to support implementation
 - Ensure suitable implementation based on effective monitoring

Research objectives

- Review key background documents on related models to reignite domestic tourism.
- Review and make recommendations to enhance the implementation of the Domestic Tourism Scheme.
- Conduct a pilot study to determine the practical application and implementation of the Domestic Tourism Recovery Framework by utilizing the Domestic Tourism Scheme as a case study.
- Refine and produce a final Domestic Tourism Recovery Framework to guide how domestic tourism in South Africa can be reignited as part of the sector's recovery plan.
- Develop indicators required to monitor and evaluate the implementation of the Framework to inform the development of future initiatives (and assess the progress of activities delineated in the revised and final Framework).
- Identify key stakeholders and engage with them to support and drive the implementation of the revised Domestic Tourism Recovery Framework and Domestic Tourism Scheme.
- Produce a training guidelines on how to implement/ apply the final Domestic Tourism Recovery Framework.
- Conduct a workshop to capacitate stakeholders on how to implement/ apply the final Domestic Tourism Recovery Framework.
- Develop a domestic tourism recovery communication framework.
- In addition to producing training guidelines, identify skills and training aspects to support the implementation of the final Domestic Tourism Recovery Framework.

Literature review: Theoretical context

- Phase 1 focus
 - Sustainable tourism development approach, linked to the ecosystem-based operational and diamond models
 - Drivers, pressures, state, impact and response (DPSIR) framework
- Phase 2 focus: Contextualizing the Theory of Change in the monitoring and evaluation of the Domestic Tourism Recovery Framework (DTRF) and the Domestic Tourism Scheme (DST)



Literature review cont.

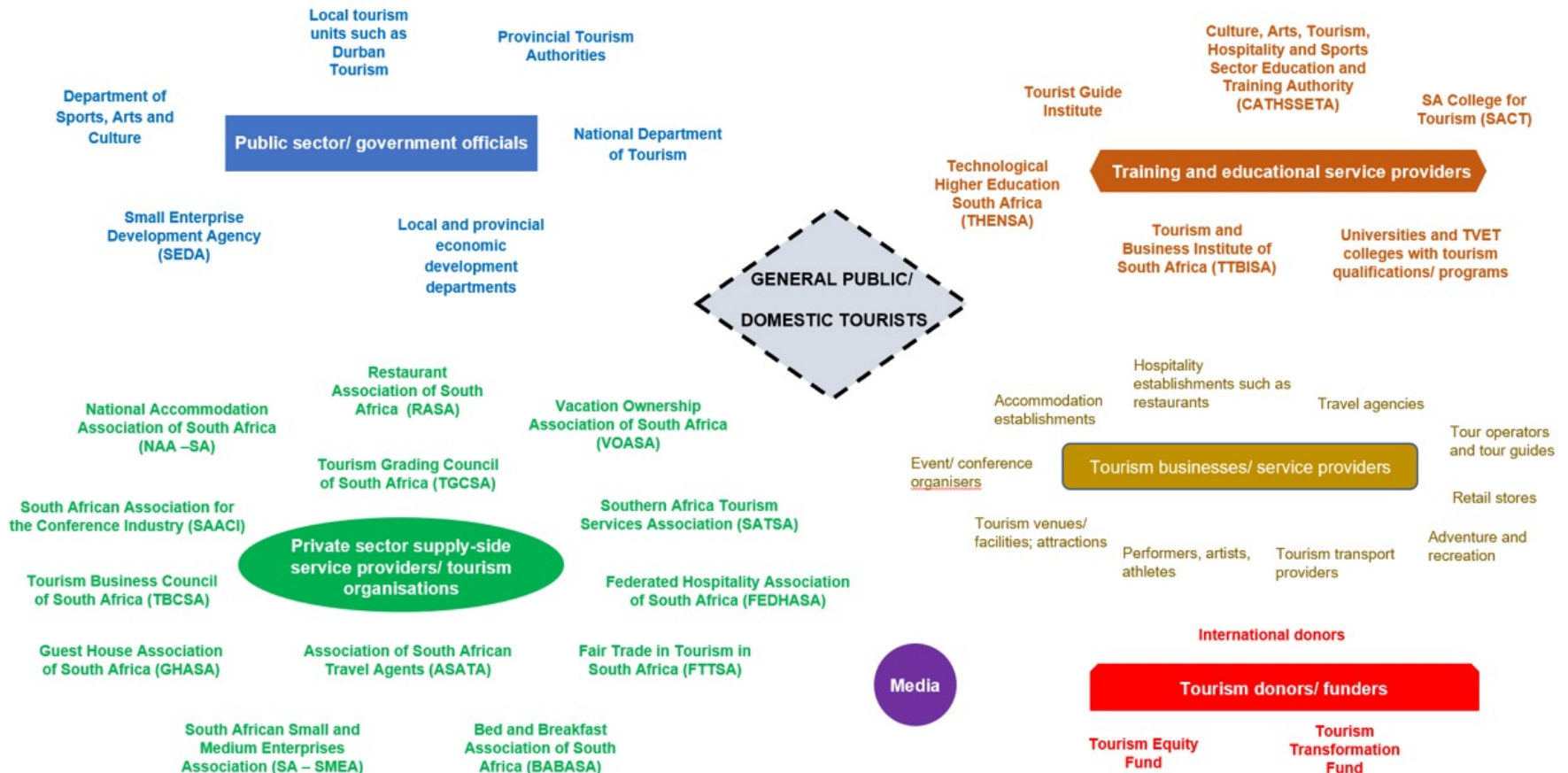
- Updating Phase 1 literature review
 - The importance of domestic tourism
 - Domestic tourism and the COVID-19 pandemic context and trends
 - Domestic tourism responses to the pandemic
 - Challenges for reigniting domestic tourism
 - Innovative responses that are emerging
 - Recommendations that are evident
- Phase 2 focus
 - Tourism recovery which is a key focus of existing and emerging literature (recognizing that domestic tourism recovery is central)
 - Current strategies to promote domestic tourism (including integrating the Domestic Tourism Scheme)
 - Educational and training aspects
 - Domestic tourism awareness and communication frameworks/ strategies

Research Design and Methodology

- Mixed methods research design
- Desktop study
- Stakeholder identification, mapping and engagement
 - Four focus group discussions: provincial and national tourism officials, tourism organizations, tourism educators and Technological Higher Education Network South Africa (THENSA) affiliated institutions and tourism organizations involved in the Tourism Education Gateway initiatives, and tourism officials from the National Department of Tourism's training department
 - Twenty four key informant interviews: tourism organizations, government officials, businesses/ service providers and the media
- Refinement of Framework including:
 - Development of a domestic tourism awareness and communication framework
 - Identification of skills development and training support
 - Development of the monitoring and evaluation indicator framework

Results

- Mapping of key stakeholders influencing or being influenced by domestic tourism

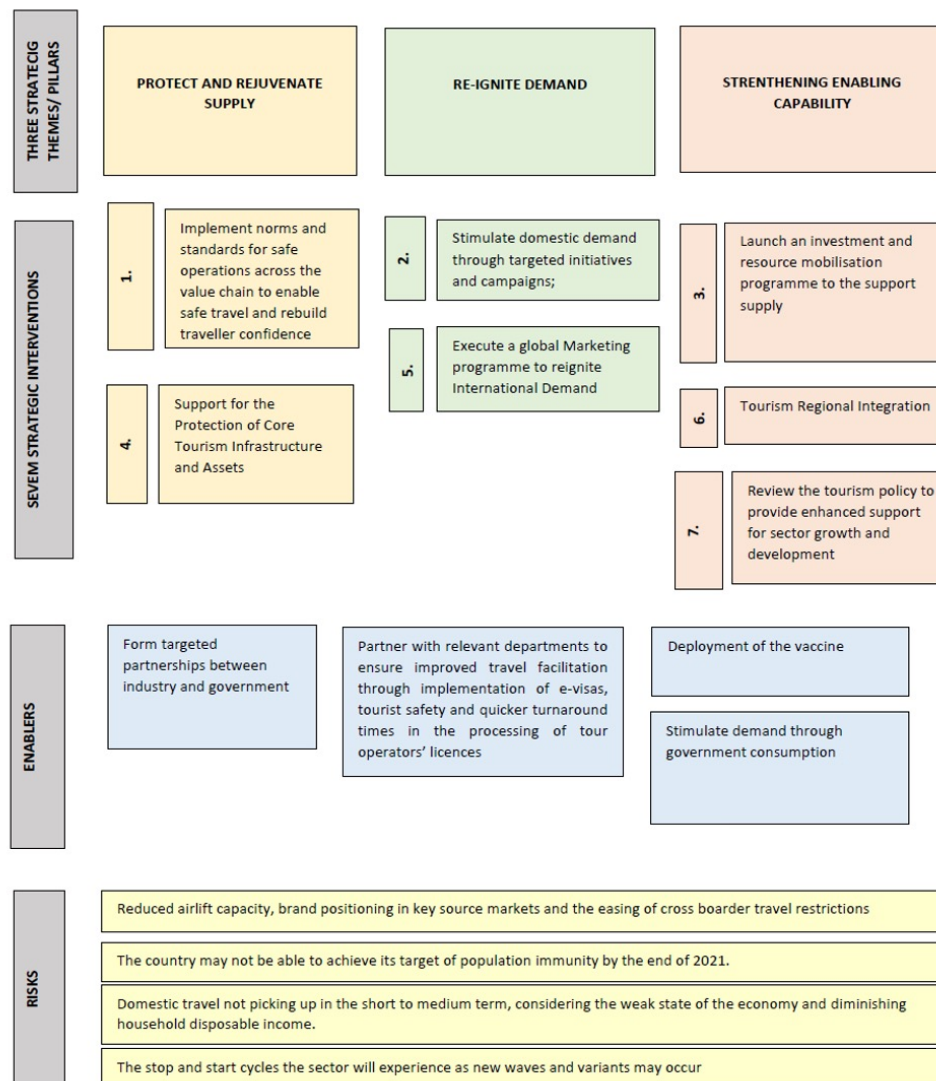


Perceptions of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme

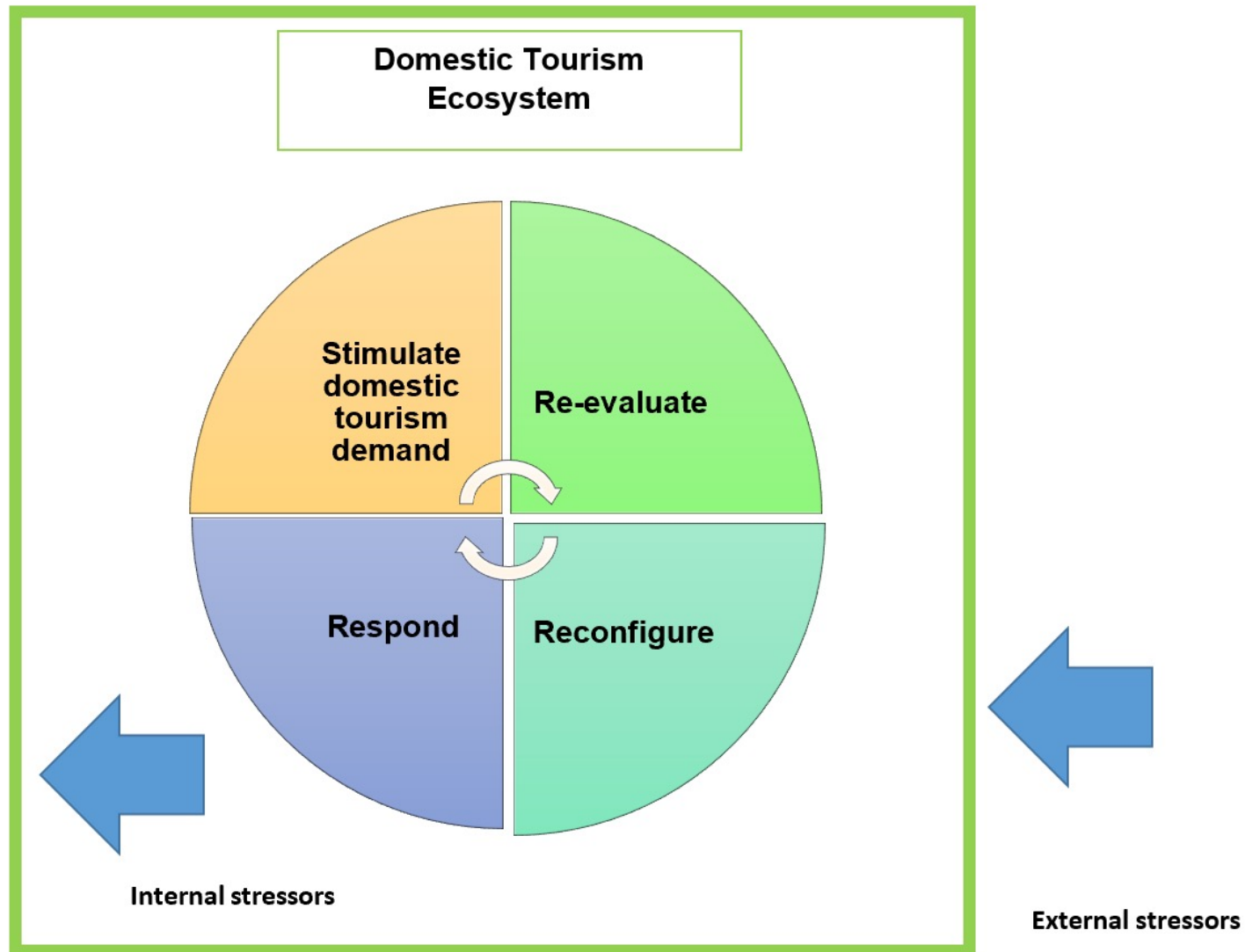
- Support for the proposed Domestic Tourism Recovery Framework
- Lack of awareness of Domestic Tourism Scheme
 - However, support for contents of the Scheme once introduced to them (also knowledgeable of aspects but did not link them to Scheme), irregularities and corruption, monitoring, regulatory and policy constraints, and dealing with disruptions
- Implementation challenges: financial, capacity and capabilities, raising awareness and ensuring buy-in from stakeholders
- Recommendations
 - Raise awareness
 - Include marketing in training and targeted campaigns to inculcate a culture of travel targeting specific groups
 - Focus on tourism SMMEs
 - Priority areas: implementing the Scheme, developing partnerships, prioritizing specific types of tourism and target groups such as persons with disabilities and learners/ students (educational tourism), promoting local destinations, embracing digital transformation, infrastructural investments, job creation and poverty alleviation, and sustainability

Revised Domestic Tourism Recovery Framework based on stakeholder engagements

Alignment with South Africa's Tourism Recovery Strategy (Department of Tourism, 2021: 25)



Framework for shifting domestic tourism sector to an ecosystem-based operational model for sustainable regrowth



SWOT analysis of domestic tourism in South Africa

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none">• Diverse and well-established tourism products and services• Sufficient tourism infrastructure (including accommodation facilities, restaurants, retail establishments, etc.)• Local demand for tourism products with high levels of awareness of specific tourism products• Discretionary income potential among specific groups (and pent-up demand in this group)• Youthful populations and households that exhibit higher levels of willingness to travel• Well-established and active tourism organisations/ departments in the private and public sectors that function from local (municipal) to national levels• Some (although limited) funding and support available to assist tourism service providers• Domestic travel incentives	<ul style="list-style-type: none">• Existing domestic tourism market is relatively small compared to the size of the South African population due to high levels of poverty and low disposal incomes• Ailing infrastructure (including transport, energy, internet connectivity and water provision) that undermines tourism experiences and the ability to effectively market destinations• Tourism facilities (such as accommodation, restaurants and transport) at destinations are geared to cater for international tourism and are over-priced for general local consumption• Tourism products and experiences are regarded as expensive for local consumption (linked to pricing for an international market)• Poor and ineffective marketing of domestic tourism products• Limited access to domestic tourism information• Limited domestic use of tourism products and services• Limited support for and focus on domestic tourism• Pricing policies• Safety and security responsiveness• Lack of climate proofing/ limitations to transition to green economy• Lack of universal accessibility• Discriminatory practices

SWOT analysis of domestic tourism in South Africa cont.

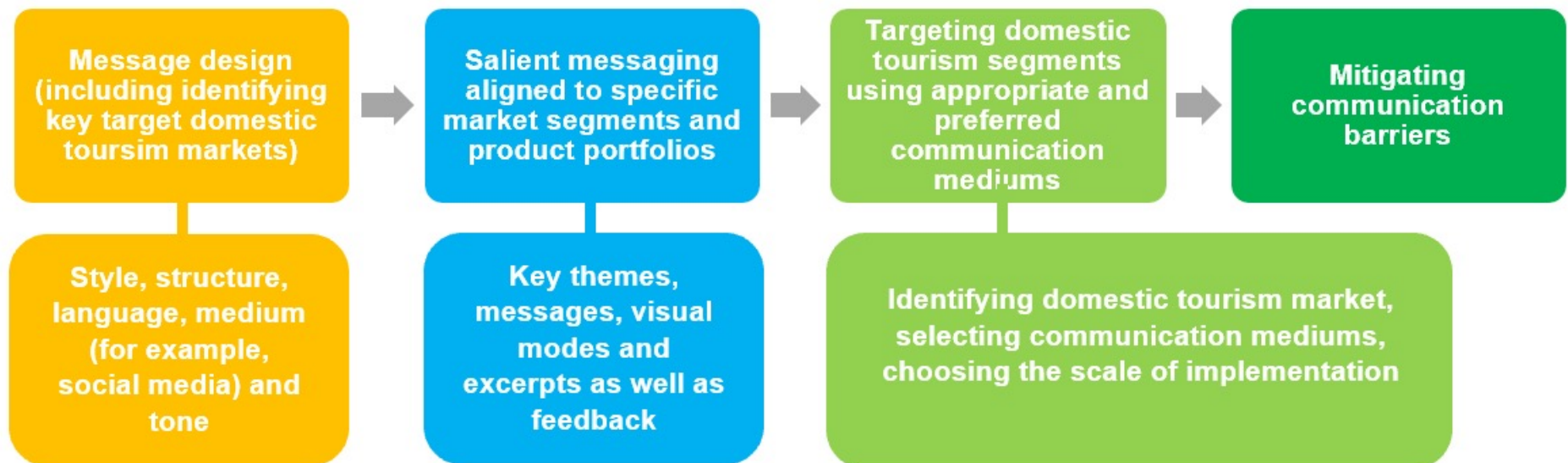
OPPORTUNITIES	THREATS
<ul style="list-style-type: none">• Domestic mobility (including visiting friends and family) is widespread• Pent-up demand• High levels of willingness to travel• Length of stay is relatively high• Potential to convert day visitors and 'staycationers' to overnight visitors with the right domestic travel packages• General economic recovery is underway, thus potential for increasing spend on travel and leisure• Market segmentation discernible that can inform targeted marketing• Potential to diversify tourism products and offerings for the domestic market• Transitioning to a green economy/ increasing focus on sustainable tourism• Changes in travel behaviour• Implementing the Domestic Tourism Scheme• Digital/ technological changes	<ul style="list-style-type: none">• Competing with international tourism markets (and internal competition that undermine alignment and integration)• Domestic tourism alone (without international tourism) is unlikely to sustain many tourism service providers• Safety and security considerations (worsened by the recent social unrest)• Financial barriers/ limitations to travel• Seasonal fluctuations• Changes in consumption patterns in eventing and conferencing (for example, virtual meetings and conferencing)• Limited capacity for job creation and economic growth affects both the demand for and supply of tourism products and services• Continued COVID-19 pandemic disruptions and legacy impacts• Other disruptions (such as economic recessions and natural disasters associated with climate change)• Fuel prices• Airline industry prices and unreliability• Pollution and litter/ grime• Reputation and image (relatedly governance and corruption challenges)• Disruptions to training

Stimulating domestic tourism demand

- Increasing and sustaining domestic tourism volumes (number of persons willing and able to travel)
 - Develop affordable tourism packages/ incentives
 - More opportunities for domestic travel experiences
 - Enabling environment for more persons to travel
- Increase spending on domestic tourism products and services
 - Increase use of existing tourism products/ attractions
 - New tourism products and/ or diversify existing product portfolios and attractions
 - Respond to domestic tourism demand
- Improved and targeted domestic tourism marketing
 - Re-energise and rethink current efforts to promote domestic tourism
 - New and innovative marketing campaigns
 - Translating awareness to consumption

Domestic Tourism Awareness and Communication Framework

- Engagement with stakeholders revealed
 - low levels of awareness of the proposed Domestic Tourism Recovery Framework and the Domestic Tourism Scheme
 - Indications of insufficient buy-in from stakeholders
- Outline of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme Awareness and Communication Framework



Domestic Tourism Awareness and Communication Framework cont.

- Adapt generic approach to target specific groups such as persons with disabilities, people in low income groups, women, youth, etc.) considering the following aspects:
 - Targeted advertising
 - Partnerships with community organizations
 - Affordable pricing
 - Local and trained guides
 - Travel agents understand specific groups
 - Collaborations with local businesses
 - Accessible and appropriate information (including language considerations and assistive technologies)
 - Accessible accommodation and attractions
 - Staff training
 - Appropriate events
 - Highlight benefits

Skills development and training support

- Need to develop a responsive and agile training and education system that include a combination of specialized skills training as well as multidisciplinary training
- Training should be flexible and adaptable
- National skills audit to identify the training needs and existing training initiatives and capacity
 - Adoption of mixed methods approaches
 - Skills survey, which focuses on training needs and existing training initiatives and capacity
 - Identify types of tourism training (including certificates, degrees, Work Integrated Learning and on-the-job training)
 - Areas that need re-skilling and upskilling
 - Identification and prioritization of target groups
 - Assessment of training needs
 - Identify appropriate trainers/ training organizations
 - Development of training content and revision of existing training curricula
- Training implementation
 - Partnerships and collaboration
 - Resources/ funding
- Monitoring and evaluation of training

Monitoring and evaluation indicator framework

- Purpose and overall impacts of the Domestic Tourism Recovery Framework emanating from Theory of Change workshop
 - Purpose
 - Providing a framework to enable the recovery of domestic tourism in South Africa to ensure sustainable tourism development and growth
 - Impacts
 - Development of a growing, sustainable and resilient domestic tourism sector that contributes to the recovery of the tourism sector as a whole
 - Effective and targeted product development and marketing to encourage domestic travel in South Africa
 - Incentives and programs (such as the Domestic Tourism Scheme) in place to encourage domestic travel
 - Training to support the implementation of the Domestic Tourism Recovery Framework
 - Meet tourism industry and stakeholder needs
 - A monitoring and evaluation system developed to track changes and impact as well as assess progress establishing 'feedback control'

Monitoring and evaluation indicator framework cont.

- Purpose and overall impacts of the Domestic Tourism Scheme emanating from Theory of Change workshop
 - Purpose
 - To enable travel and tourism participation by people of modest income and the inclusion of previously marginalized members of society
 - Impact
 - Domestic Tourism Scheme products, incentives and interventions promote domestic tourism
 - Increase in the number of domestic tourists from targeted groups
 - A tourism sector that is responsive to the needs and interests of domestic tourists from targeted groups
 - Partnerships with stakeholders to support implementation

Monitoring and evaluation indicator framework cont.

- Champion: Department of Tourism
- Monitoring and evaluation communication strategy: target groups, timeframes and reason for communication

Target groups	Timeframe/s	Reason/s for communication
Domestic tourism information/ data collectors/ generators: including national, provincial and local tourism departments as well as tourism organisations and departments collecting tourism business information	Initial implementation phase to generate baseline information (where non-existent) and thereafter at regular intervals to assess impacts and progress in achieving indicators. Information is collected timeously, verified and validated for improved quality assurance and reporting purposes.	Identifying the sources of information and who will be responsible. Data generators and custodians are fully aware of monitoring and evaluation timeframes and requirements. Alert the Department of Tourism to challenges that need to be addressed. Training needs can also be identified and included in the implementation plan.
Information/ data managers: this includes persons/ officials, units and organizations that routinely collect domestic tourism information	At the start of implementing the monitoring and evaluation framework. Thereafter, if needed to support capacity and development and improve domestic tourism monitoring and evaluation capabilities.	Responsible for verifying and quality-assuring information as well as providing an oversight function. Can undertake different types of research that not only improve evaluation analyses but also assist in informing evidence-based decision-making in relation to identified strategic areas.
Data/ information users: includes departments and officials within government at different levels as well as tourism organizations	Need to be identified and appraised of the strategy, implementation plan and framework (best to include in consultative processes).	Maximizes reporting and use value of domestic tourism information that can be used for strategic purposes, including the development of interventions/ programs, resource allocation decisions as well as policy formulation and review.

Monitoring and evaluation indicator framework cont.

- Institutionalization - Developing capabilities within an ecosystems approach
 - Capacity: necessary resources (including personnel and data management systems) are in place. If not, training and capacity needs should be identified and actioned.
 - Capabilities: are personnel sufficiently trained to undertake the tasks associated with domestic tourism monitoring and evaluation?
 - Infrastructure: data management systems need to be adequate and functional
- Embedding – integration and interfacing with other system
 - Improve data quality
 - Minimize data replication
 - Decrease actual data collection, if already being collected (information is collected by the main custodian and accessible to other authorized users)
 - Permits data to be aggregated and disaggregated to understand trends and impacts spatially

Monitoring and evaluation indicator framework cont.

- Indicators
 - Domestic tourists
 - Economic impacts/ job creation
 - Domestic tourism products and services
 - Projects/ programs to reignite domestic tourism
 - Domestic Tourism Scheme
 - Safety and security
 - Funding/ investment
 - Training
 - Media and communication monitoring
 - Sustainability
 - Organizational support
 - Development and implementation of sustainable domestic tourism policies/ strategies, frameworks and guidelines by tourism authorities and local governments

Conclusion

- The domestic tourism sector's recovery is critical to South Africa's economic and social recovery
- The Domestic Tourism Recovery Framework developed from the evidence-based approach adopted and the Domestic Tourism Scheme provide guidance on how to shift the domestic tourism sector from a traditional industrial model to a more sustainable ecosystem-based model
- Leveraging the sector's potential and repositioning it for sustainability and resilience will can unlock significant economic benefits while promoting socio-economic benefits

Thank You! Siyabonga!



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