



**tourism**

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Department:  
Tourism  
REPUBLIC OF SOUTH AFRICA

# A Framework for Gastronomy Tourism Development in South Africa

Department of Tourism

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# 1 Summary

## 1.1 Scope

In the sections that follow, this report deals with the development of gastronomy tourism at three levels:

- the overall purpose of the initiative (the **project objectives** and **deliverables**),
- a framework that organises the things that are now to be done (the plan for **project implementation**),
- a tentative arrangement indicating who should be involved and how (the **responsibility matrix**).

The report is based on data from a substantial study into tourism projects in South Africa, with a focus on gastronomy projects and involving in-depth interviews. 29 respondents represented three significant stakeholder groups: tourists, tourism service providers, and intermediaries.

There are seven Annexes that provide background notes and explanations.

## 1.2 Four issues

In determining an appropriate approach to the project, certain issues were found that shaped the approach:

- there are *different views* as to what gastronomy tourism is, it is generally seen as just one feature of a much wider approach to tourism,
- there is *no standard view* of the expected level and scope of a gastronomy tourism project,
- there is a *need for a process* to identify appropriate opportunities, and
- there are *differing views* about how to “make things happen”.

The recommended strategy addresses these issues:

- **Definitions:**  
It is recommended that a **wide definition** of “gastronomy tourism” be adopted, embracing food & beverages as a simple, necessary aspect of all tourism, right through to fine-dining and intensive culinary experiences as specific and tightly-focused tourism opportunities. *A “Portfolio Model” is proposed that will allow new project proposals to be managed and supported according to their particular and different characteristics.*
- **Boundaries:**  
One of the greatest risks to any project is a failure to define the boundaries – of the actual project *and* the responsibilities of those who are involved. *It is recommended that gastronomy tourism should be supported in a collective way, gathering well-bounded “Projects” into “Programmes” that provide support, ensure boundaries are clear, and manage strategic direction.*
- **Identification:**  
It is recommended that there is a formal process for finding, assessing and approving support for gastronomy tourism, and that all tourism projects should be expected and encouraged to include gastronomy elements. *A “Value Chain” is presented as the key framework for managing the processes of identifying and assuring proposals for gastronomy-related tourism projects.*
- **Planning:**  
It is recommended that full project management should be required of projects applying for support, having due regard to scope and maturity.

*The approach to project management needs to reflect the differences in large and small projects: a new “**Portfolio Model**” is presented that will guide the processes of definition and management, given the evidence of significantly different project management challenges in different projects.*

## 2 Purpose of the project

### 2.1 Objectives

Objectives for this project are laid down in the SLA, and are focused on exploration, stakeholder concerns, potential benefits at all levels, national history, heritage, culture, diversity, tourism products and experiences, promotion, economic development and post-COVID recovery. There is an occasional focus on the specifics of *provinces* that will be addressed in the recommendations.

The recorded objectives in the SLA are re-produced below (in **bold**), with notes (in *italics*) based on the findings of this study<sup>1</sup>:

- **To explore the opportunities presented by the gastronomic/food/beverage sector as a key component of tourism.**  
*A wide range of opportunities has been found, evident in the data collected and illustrated in the examples given in this report.*
- **To assess the potential of local culinary sector as a tool to develop small businesses and tourism destination marketing for the province.**  
*Clear evidence of the potential has been found, that must be set against the evident challenges faced by new projects.*
- **To develop a framework to develop the culinary tourism sector in South Africa through the developments a multi-stakeholder approach to co-creating value through tourism.**  
*A conceptual model, that was reviewed and adopted at the start of the project, provided foundations for the design of the study and for the data analysis that followed.*
- **To identify focus areas for development and investment in order to support the development of culinary tourism with a specific emphasis on the promotion and development of tourism culinary experiences across South Africa in order to showcase the country's history, heritage, cultures and geographic arid agricultural diversity.**  
*It has been found that prospective tourists have a wide range of hopes and expectations. Rather than tourism experiences, there is a need to optimise the government support systems that enable, permit, regulate and monitor tourism. Having said that, the copious data gathered could be further mined for details of the links between development, investment and promotion, and success.*
- **The framework will also provide guidance to assist destination(s) to identify local culinary products and experiences.**  
*It is proposed to examine asset mapping as a key tool, and there is evidence of effective methods of working in specific (but not all) contexts. A map of gastronomy experiences and a calendar of food festivals has been prepared to assist in addressing this objective.*
- **The framework will also provide guidance on development of promotional and marketing strategies and tools for the development of culinary tourism at local, provincial and national levels.**  
*A portfolio model is presented as a means of identifying, positioning and managing portfolios accommodating a range of small and large projects.*
- **To develop a framework that will outline what is required to ensure specific emphasis on transformation through community development, poverty alleviation, focusing on women and youth empowerment and hence sustainable tourism.**

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<sup>1</sup> It should be noted that the original text of the SLA referred consistently to “culinary tourism”; it was later agreed to adopt the term “gastronomy tourism” – where it occurs here the former can therefore be read as including the latter.

*It is recommended that there are clear processes developed to identify and then qualify culinary tourism project proposals.*

- **To propose the strategy required to promote culinary tourism in each province.**  
*It is found that working province-by-province is not necessarily the only way to organise strategies – the greater potential might be found at local and regional (trans-provincial) levels.*
- **The report must also show how the development of the culinary sector amongst other measures can be used-as-post COVID-19 crisis recovery strategy.**  
*Covid has clearly had an impact on tourism – no specific ideas emerged that would be specific to post-COVID recovery other than general recovery on a wider basis, given the variety of challenges facing the country at this time.*
- **To re-ignite domestic tourism after the negative impact of the COVID-19 pandemic on the sector.**  
*See the prior comment.*
- **Must align to the Guidelines for the Development of Gastronomy Tourism, UNWTO, 2019**  
*The alignment is shown in Section 2.3 below – it is the opinion of the team that the UNWTO guidelines are rather complicated and in need of re-organisation and simplification, and that has been done. Further, they do not take account of the wide variety of projects and opportunities that are evident in South Africa.*

## 2.2 Deliverables

Given the objectives listed in the (above), the key deliverables out of the project can be summarised:

- **Implementation framework:**  
The new Portfolio Model provides a framework for implementation.
- **Opportunities:**  
A new Value Chain provides a means to identify opportunities.
- **Transformation targets:**  
It is recommended that transformation targets are set within programmes (portfolios of individual gastronomy tourism projects) that may or may not align with provinces.
- **Province-by-province strategies:**  
See above – strategies may be more effectively set within programmes that are bounded other than by provincial structures.
- **Post-COVID-19 indicators:**  
Present data collection procedures are inadequate and any indicators of success should be set within programme portfolios.

The SLA provided a detailed list of deliverables for this project, that are re-presented in Annex 1 with extensive notes about how they have been addressed.

## 2.3 Alignment with UNWTO

It is required that the Framework is aligned with the UNWTO guidelines; the four issues that guided the formulation of this project (see Section 1.2 above) embrace the UNWTO guidelines as indicated in the table below (with notes and references to the sections of the UNWTO guidelines):



Issue	Notes	UNWTO reference
<b>Define Gastronomy Tourism</b>	It's part of a trend to more focused and special-interest tourism, and yet an aspect of all tourism experiences. In the extreme it involves investigation of gastronomy genres and experiences of actually producing and sharing food and beverages.	1.3 Analysis of trends in gastronomy tourism 1.6 Analysis of the destination's image and gastronomic positioning
<b>Set project boundaries</b>	Problems arise frequently at geographic, administrative, and cultural boundaries. There are differences according to the maturity of a project. Scope might even cross provinces.	1.1 Planning and management of gastronomy tourism in the territory 1.2 The value chain of gastronomy tourism 1.11 Governance: promoting public-private collaboration
<b>Identify gastronomy tourism projects</b>	Success is principally derived from the emergence of champions who understand trends, manage their scope and position in the market. Risks from competition and other factors needs to be mitigated, and ideally targets need to be set. Success arises from the bottom up, and benefits from synergies.	1.4 Comparative analysis and analysis of competitors in the destination 1.5 Quantitative and qualitative analysis of gastronomy tourists 1.7 Defining the destination's competition strategy 1.10 Offering memorable experiences: guaranteeing quality services
<b>Develop plans</b>	It is necessary to determine pre-requisites (not necessarily funding), negotiate commitments with others and set out a timetable. Then, training and marketing. Communicate widely Ensure that effective project management is in place	1.8 Promoting product development and innovation 1.9 Training, professionalization and job creation 1.12 Control and monitoring mechanisms

### 3 The framework

In this context, the role of the Department of Tourism is to identify and enable gastronomy tourism projects – those that succeed represent the *value* generated by the Department. In turn, those projects deliver further value in ways that fulfil the needs of stakeholders. Acknowledging the need for value, the framework is presented as a **value chain** (a management tool that already has a long history<sup>2</sup>):

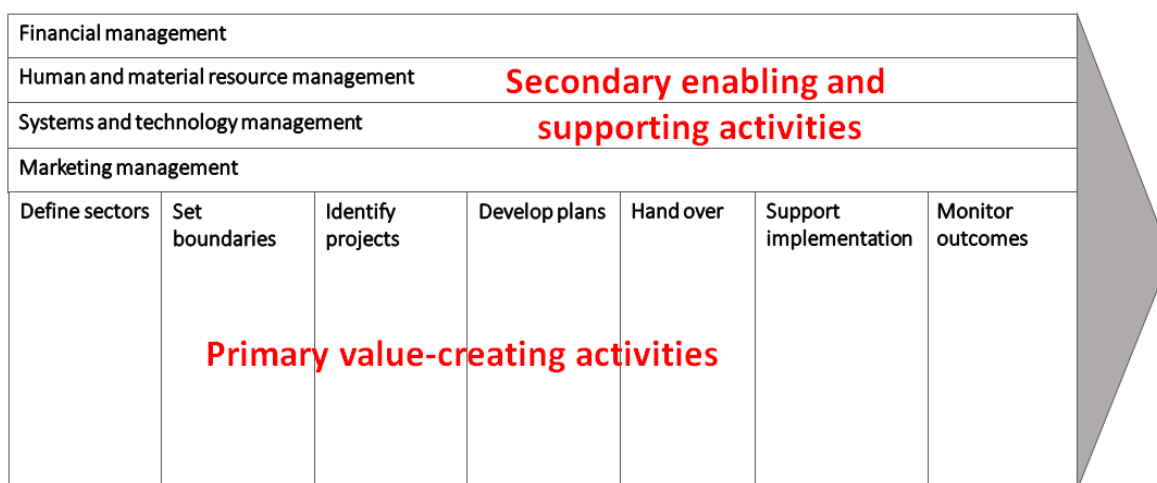
- It breaks down the activities of an organisation showing where value is created, to what extent, and at what cost – the “**primary**” activities.
- At the same time, it identifies the activities that enable and support value-creation – the “**secondary**” activities.

In a multi-stakeholder initiative such as this one, it is important to understand and agree what is “value”, i.e. the *benefits* that are delivered to *stakeholders*:

- Tourists
- Tourist service providers
- Intermediaries (travel agents, tour guides, and so on)

For this reason, the study obtained input from 29 representatives of these groups (See Annex 6, Respondents) in order to understand **the chain of value creation whereby the Department can deliver a useful tourism projects that benefit these stakeholder groups:**

#### Tourism project “value chain”



**Figure 1 A tentative value chain for the development of a tourism project**

This value chain comprises the core of the Framework that is required, and it guides the life cycle of all tourism projects, including those concerned with gastronomy or any other special interest.

The seven lower “boxes” comprise the stages that create value – the “primary” elements of the value chain; the four above comprise the supporting, ongoing activities that enable the generation of value but are (in essence) cost drivers that simply have to be there, to provide support and context – the “secondary” elements of the chain. The paragraphs that follow provide details, informed and illustrated by extracts from the actual conversations with respondents. It should be noted that the selected extracts are a tiny portion of the total – Annex 4 provides some statistical

<sup>2</sup> Porter, Michael. *Competitive Advantage: Creating and Sustaining Superior Performance*. New York: Free Press, 1985.

results, and Annex 7 reminds us that the data analysis found over 2,000 instances where respondents said something relevant to the matters at hand.

### 3.1 Four things to do before “Hand over”

From the many inputs available to this project, garnered from stakeholders with quite different roles and perspectives, and analysed in reasonable detail, there are four principal areas of potential confusion that need resolution, as summarised at the start in Section 1.2.

- there are *different views* as to what gastronomy tourism is,
- there is *no standard view* of the level and scope of a gastronomy tourism project,
- there is a *need for a process* to identify appropriate opportunities, and
- there are *differing views* about the means to “make things happen”.

They are all in some sense “preparatory”, and are addressed here as the first four distinct stages of the framework.

#### 3.1.1 Define Gastronomy Tourism sectors

Academics and others have defined gastronomy in similar but different ways, and invoked different words to identify it. There is no need: South Africa already displays a wide range of gastronomy genres, restaurants and eateries of all kinds, and offers tourists the opportunity to engage with the food production and processing industry in different ways.

*Now, let's go straight to the nub of it. Culinary tourism, what to make of that? How do they define culinary tourism?*

*[Respondent T, Intermediary, Western Cape, 2022/04/11:0900]*

We can adopt a wide definition:

***It is recommended that a wide definition of “gastronomy tourism” is adopted, embracing food and drink as simple, necessary aspects of all tourism, through to fine dining and engagement with the industry.***

As well as the focus of the gastronomy tourism project there is the matter of scale. Does it have to be a project on a single farm or within a single eatery or bar, or can it embrace a complete region? We have to deal with *scope* in setting out a gastronomy tourism project.

#### 3.1.2 Set project boundaries

Such a definition of gastronomy tourism maximises opportunity but leaves the challenge of managing a wider scope. Hence, it is necessary to categorise and organise gastronomy tourism projects by setting boundaries. Further, gastronomy tourism happens at different levels, from the individual entrepreneur to a village, to a town, and so on, right through to trans-provincial initiatives that feature food in a wider context, such as regional ecological or cultural initiatives.

*But there needs to be something for people to do other than eat and drink.*

*[Respondent D, Foreign tourist, 2022/04/05:1900]*

*I think there's a lack of understanding basically, on rural tourism, and the importance of rural tourism, in creating rural development. And I'm talking here across the board ...*

*[Respondent H, Intermediary, SA, 2022/04/08:1600]*

Obvious issues are concerned with *scale* and *focus*. There are small projects that focus on providing one thing and yet still succeed:

*But the follow through of the lady that does vetkoek in Beaufort West and sells on the road. Oh, I mean, yeah, “she's making a good living”, maybe anecdotally ... Thank you very much for being the first! I'm pleased you're involved.*

*[Respondent M, Provider, Western Cape, 2022/03/29:1400]*

And there are much larger actual or potential projects that endeavour to provide a range of products or experiences, over a wide trans-provincial geographical area:

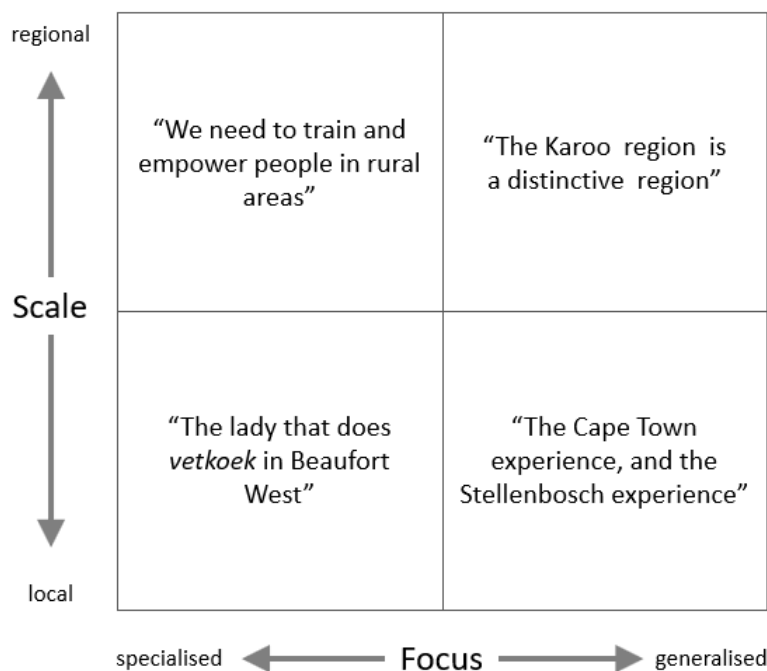
*And I think unless we understand the dynamics of rural, and how we need to train people in rural areas, empower them in rural areas, and if a budget was set aside ... I definitely think training would help because then one could see the potential.*

*[Respondent M, Intermediary, SA, 2022/04/08:1600]*

*The most prominent authentic Karoo regional cuisine are the dishes using traditional and local produce. Lamb is often the main ingredient such as lamb roast, lamb pies, and lamb bredie, combined with other local produce such as venison, pomegranates, quinces, prickly pears and figs. Other traditional favourite South African foods are also very popular and have been absorbed into the culinary heritage and cuisine of the region: Rusks, mutton rib, sosaties (kebabs), roosterkoek (griddle-baked bread), milk tarts, offal, lamb’s tails, sheep’s heads, mutton crackling (kaiings), sheep’s livers and even porcupine are also offered in the Karoo.*

*[Literature, Internet, 2022/03/28]*

These ideas of scale and focus can be combined in a simple 2x2 model that allows us to position a project – this is necessary because the most appropriate support that can be provided to an emerging project *will be significantly different according to its nature:*



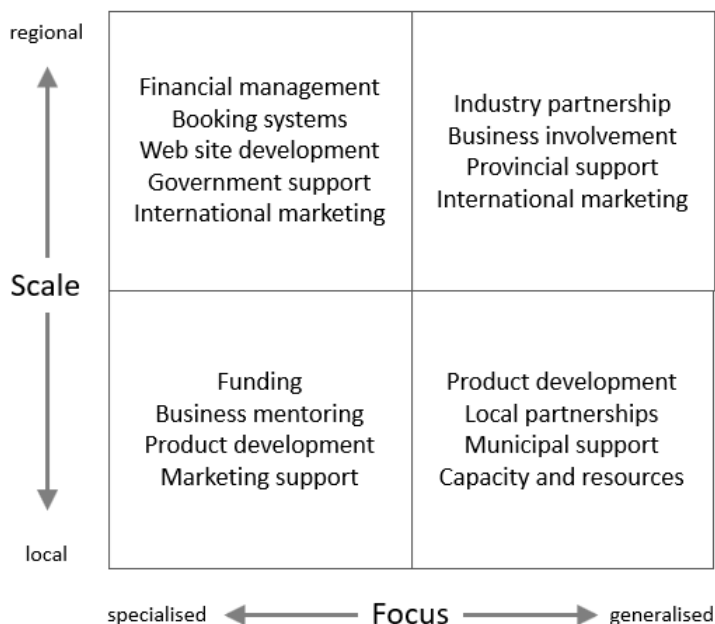
**Figure 2** Categorising projects according to scale and focus

There are further issues that arise because of the *maturity* of a project. This is the idea that almost always a new idea is chaotic, with sceptics who dismiss it as impractical or purposeless, but as it develops it demonstrates its actual potential and becomes controllable. Hence it can be argued that there are three characteristics of any gastronomy (or other) tourism project that must be managed. For the present purpose, let’s just take the two extreme examples (the bottom left and the top right):

- Projects focused on a local, specialised product or service need simple support: money at the start, support in developing a viable business operation, and ultimately product development and marketing support.

- Projects with a wide scale and broad focus need industry and business partnership, government support for international marketing, and effective systems for handling enquiries, bookings and financial management.

We need go no further to learn that supporting and managing all projects in exactly the same way makes no sense, because – as well as scale and focus – at different stages of *maturity* the risks and the requisite support are different.



**Figure 3 Different support for different projects**

Figure 3 attempts to make a first pass at indicating the different kinds of support for projects that differ in scale and focus. What we now have is a **portfolio model** that can be used to arrange the different projects within a town, city, province or region in a balanced way. As with the value chain, 2x2 portfolio models such as these have long been a feature of progressive management thinking, often leading to greatly improved marketing strategies but informing other management domains such as resource management, information systems and technology, and financing<sup>3</sup>.

Here, because differences in scope and focus make different demands on capacity and management competencies, we need to consider the challenges involved in managing and supporting large numbers of tourism projects of different kinds, especially the risks involved. Good practice elsewhere (such as engineering and construction) introduces the idea of **programmes** as a means to manage projects of particular kinds *collectively*: projects must proceed to an *agreed timetable* with *known deliverables*, and should be essentially risk-free; *programmes* accommodating those projects sit at a higher level and manage risk and uncertainty by defining projects with a clear scope and a reliable budget, and then managing them pro-actively.

In essence, projects deliver *outputs*, but programmes deliver the intended *outcome*. There is considerable merit in adapting this idea to the strategic management of tourism projects.

***It is recommended that gastronomy tourism should be supported in a collective way, gathering individual “projects” into “programmes” that provide support and strategic direction.***

<sup>3</sup> Morrison, Alan, and Robin Wensley. ‘Boxing up or Boxed in?: A Short History of the Boston Consulting Group Share/Growth Matrix’. *Journal of Marketing Management* 7, no. 2 (1991): 105–29.

The means to do this is left as a matter for further discussion.

### 3.1.3 Identify gastronomy tourism projects

It is expected (of course) that there will be some process to invite new gastronomy tourism initiatives to apply for support, and the best way to adopt new projects needs consideration. Too much public money has been wasted on projects that were clearly unlikely to succeed right at the start.

The evidence shows that successful projects almost always have *champions*, who have the capability and commitment to making an idea work. And, it takes a long time.

*One of my very good friends, he said it only takes 11 years to become an overnight success. And I think that sums it up so well, because you sort of dredging away, trying to just get people to know who you are and that's how the Friday catering started.*

*[Respondent W, Provider, Western Cape, 2022/04/20]*

Of course, as noted elsewhere, gastronomy activities are a part of every tourist experience and can be encouraged in all projects. In view of the differences in different projects that are now apparent:

***It is recommended that there is a formal process for finding, assessing and approving support for gastronomy tourism, and that all tourism projects should be expected and encouraged to include gastronomy elements.***

The published literature is replete with ideas about finding opportunities:

*In the South African context, du Rand & Heath, (2006) identified implementable initiatives for culinary tourism.*

- One, the establishment of culinary tourism networks and regional development.
- Two, culinary tourism marketing activities.
- Three, the development of food events, food festivals, local product promotion.
- Four, culinary heritage identification.
- Five, develop foods related activities: gourmet cooking holidays, food tours and food routes.

*[Isaac Abe, Literature, Team, 2022/03/28]*

### 3.1.4 Develop plans

Developing strategies is actually easy, making them work with effective plans and project management is often extremely difficult. Providing the right kind of government support for new *businesses* – one of the principal, potentially beneficial opportunities available – is critical.

*I think the problem is even greater than that, they don't talk about starting these businesses, because they don't realize the potential of these businesses, and I'm talking specifically now from a South African viewpoint, if the government is going to continue to provide funding ...*

*[Respondent B, Intermediary, Western Cape, 2022/03/30]*

But it is not only about funding. There are issues with skills, competence and capability, leading to the obvious need for education and training. Young recruits can be difficult, one project to properly educate and place young people from a rural environment into to a top-class hotel failed in just days:

*The reason was, "We had to work too hard" - that tells you something. I mean, the parents said to the children "My child, you don't have to work so hard. We'll come and fetch you".*

*[Respondent E, Domestic tourist, Western Cape, 2022/04/06:1000]*

A strong hint of cultural challenges. If people are not up to it, they should not be admitted to programmes like that, or special attention must be made to the factors that will motivate them. Education is an obvious target action area, but making education work for gastronomy tourism requires attention to all genres of food, heritage, transformation, business development, ecological issues, and customer service.

In the end, successful implementation is all about managing the risks.

***It is recommended that full project management should be required of projects applying for support, having due regard to scope and maturity.***

The support that is provided must address the full range of needs, for funding (not always actually needed), education, business guidance, marketing and access to required human and material resources.

### 3.2 The follow-through after “Hand over”

The framework has three activities that can only happen at implementation:

- Hand over
- Support
- Monitoring

The notes that follow examine these three activities and include selected illustrative quotations from respondents.

#### 3.2.1 Hand over

When plans are in place there are the challenges of handing over, and launching new projects. In an ambitious project to deploy existing cultural talents as a feature of local tourism packages, the project champion launched competitions and auditions:

*How did I do that? ... I did a competition: dancers, singers and actors. I got funding from British American Tobacco. So, public private partnership through the municipality and the private sector, I had many other companies come on board. We did auditions in each of these communities, eventually took all of the forms that we took of the auditions to the university, the music and drama departments, they were the ones with the skills who could identify the top 10 or 15 in each community ... we won the trust, we built relationships. We met the pastor's we met the school principals and teachers. The whole process took a year.*

*[Respondent B, Intermediary, Western Cape, 2022/03/30]*

In this case the winners were judged on social media, with thousands of votes submitted within hours. Are there ideas here that would work with gastronomy? The investment of time and effort building relationships with other stakeholder groups is clearly critical.

#### 3.2.2 Support

There was occasional frustration expressed with government at all levels. In the matter of financial support, one respondent shared an opinion:

*Basically, the government does don't get it. The Department of Tourism, in my opinion, doesn't get it right. There's one or two things they get right like, sponsoring and paying for expos and the marketing side. Occasionally something happens, like I only discovered yesterday that there's a shebang going on, some kind of thing at the national convention centre. I didn't even know that! Nobody told me. So what typically happens is the Department has a few favourite businesses, and they trot out the usuals. And they fly them down. And because Departments are in the business of box ticking, okay, they tick a box. So it's not about output. It's not about impact, because they don't know how to measure impact and impact is too long term for them anyway, because the purchase cycle is [so short]. So as long as you've ticked the boxes in that year, you look as if you're doing something, okay. I think the national Department of Tourism, just the fact that they commissioned your study already means that they mean well, and they're not clueless, but they don't understand how to trickle down the impact down to grassroots. Part of the problem is that they're supposed to work with provinces, and districts and local municipalities. So that's where inter-governmental relations problems start. Now, what typically happens is that some provinces are stronger than others. I think, I mean, the worst province, the Free State must take the prize for doing zero. I don't know what budget they've got, what people, they're not even visible. Whereas Northern*

*Cape, potentially is a bit better. So on the marketing side, the role of national Department of Tourism is to assist the provincial departments to actually do their job. I didn't think they're doing that.*  
 [Respondent J, Intermediary, Free state, 2022/04/13]

This sounds like the sum of bitter experience. In the general literature, there is extensive evidence of the need to support projects through the whole lifecycle, as in the case of the Karoo:

*The Karoo region straddles four provinces, which has hampered an integrated tourism marketing and development strategy ... [but] the strongest business sector in the Karoo is tourism, as it encompasses the largest proportion of enterprises. Nevertheless, the spread of tourism in the Karoo remains unequal: In South Africa little has been done to 'package' and market the many small towns in the rural hinterland ... throughout the country there has been a divergence between those towns that 'got it right' and those 'where nothing happens'... towns with fewer entrepreneurial resources, are being left behind' (Atkinson 2009: 157).*  
 [Internet, Literature, Internet, 2022/03/28]

Although this is an early analysis, the need for support is still evident and the role of the provinces in hindering progress on-the-ground is seen elsewhere. A tour operator visited tourism initiatives in Europe and was inspired:

*I came back here, approached the local government, tried to get into a project something like "The Cape Wine Experience". Well it died until eventually somebody from Wesgro combined it with a South African wine event that was held in the second year. And I sat on the committee but we weren't talking the same language ... we were told there was money in the Western government for that, and then it was blocked ... and the Wesgro thing was a total flop, instead of inviting at least 100 operators all they did was invite journalists ... and I think for operators all the money that was given to them just wasted. It was a disaster. I was so angry, and that's their loss. Unless the government makes an effort putting in money and bringing in people whose business attempts to [gather inbound tourists] ... they just invite the same people who come for the same thing.*  
 [Respondent M, Provider, Western Cape, 2022/03/29:1400]

It's a pity that such enthusiasm and commitment turned into a negative experience – in this case there was a fully-described and fully-motivated proposal, but no process that could successfully qualify and enable the ideas therein.

### 3.2.3 Monitoring

Without reliable data about the outputs and outcomes of tourism initiatives it will never be possible to fine-tune the effort involved so as to maximise the benefits. How many jobs were created? How many young people helped off the streets into gainful, sustainable employment? How many tourists, and did they have a good time?

One respondent dug down into some of the details:

*There's a tiny sector within the tourism industry that would sit behind a computer and maybe do bookings and accommodation ... but the people that are actually engaging with your tourists? What do you remember most about a certain restaurant? Was it not that waiter that engaged with you in such a manner that I mean, you weren't even hungry, but you ate three courses based on their recommendation? You want to go back to a place you weren't even in? The cashier at the supermarket where they recognize us? "Hi, Mr. Sage, how you been this week?" ... You want to go back to your restaurant where in Pretoria there was a an Italian restaurant, didn't have two tables that look the same, not two chairs [but] when you need when you enter "Good evening, this is Heinz" and immediately he brings you your regular ... it makes you feel special. [But] there's not a thermometer that I can give you to give you that passion or to measure it, but certainly I just think if you're going to be in this industry, and you're not a people's person ... ?*  
 [Respondent B, Intermediary, Western Cape, 2022/03/30]

An interesting meander through the good and bad of service management ... but although it was not mentioned in that conversation, for most tourists and for some tourism service providers the



reviews on Google Maps and Airbnb (and the rest) are the practical (if not the definitive) measure of whether a place is worth visiting. So how can these ubiquitous services be harnessed to improve the quality and fulfilment of South African tourism? And South African food and beverage experiences?

### 3.3 Enabling and supporting

At this stage it is clear that at least four areas of enablement and support are needed at all stages in the lifecycle of a tourism project, whether gastronomic or some other:

- Financial management
- Human and material resource management
- Systems and technology
- Marketing

There may be other over-arching needs, and the organisation of support services needs to be kept under review. The notes that follow examine these four.

#### 3.3.1 Financial management

In different cases, it was predictable that financing came up, even with tourists:

*So you have a feeling that there's potential here that's not tapped? Well, obviously promotion takes money.*

*[Respondent D, Foreign tourist, 2022/04/05:1900]*

Often, private enterprise is involved:

*I got funding from British American Tobacco. So private, public private partnership, through municipality and the private sector, because I had many other companies come on board.*

*[Respondent B, Intermediary, Western Cape, 2022/03/30]*

And sometimes financial support from government is at least partially successful (and clearly delineated):

*[In] 2020, we had a deal with the Department of Tourism where they gave us a chunk of money. And for every guest that walked in the door, we were able to give them a R100 voucher, and we had a little SMME exhibition, where people could buy things from the exhibition – Marula, jam and beadwork and stuff like that – to give people a little bit of exposure. So the first year that the Dept gave us a big chunk of money, and the second year, they gave us less money, which is what they told us. In fairness, they told us that the first year they were going to give us 150,000, which we basically used all of it, and then we got the ticket sales. And then the next year, they gave us like 75,000. And so we still got the ticket sales, but it was obviously a lot less than we had the previous year. And then they ended up owing us 21,000 Rand for the ticket sales.*

*[Respondent O, Domestic tourist, Limpopo, 2022/04/13:0900]*

Taken overall, the results of this study indicate that there are different financial support models, that need to be aligned with the different kinds of project.

#### 3.3.2 Human and material resource management

Finance was sometimes seen as just one component of the required resources:

*Right, constraints, if I could start there: resources and capacity. Financial resources, HR human capacity. First of all, not enough money to roll out ideas or to implement ideas. One might sit here and have many ideas. And I'd like to think that I am creator, and creative thinker. So yes, of the many ideas that I have, I've not been able to implement, because of the constraints that we have financially. But I think it's, the problem is much greater than meets the eye. It's an understanding that tourism is actually an incredible job and wealth creator, but is not recognized for the country*

*[Respondent B, Intermediary, Western Cape, 2022/03/30]*

But we learn that by organising and engaging local champions, considerable success can be achieved:

*So I started doing tourism awareness workshops, because I now knew who to invite, I took them to the tourism Indaba, because we created tourism committees in each community – and the chairperson of each of these six communities, I took them to Indaba. Once again, you have to teach, look at Indaba, and see all of the products in South Africa from game rangers right through to whatever, the creme de la creme of South African tourism at Indaba. [Then] come back and decide how you want to position your community: what would be unique, why must they visit your community context in the context of what you now saw. And [the] committee came back and said we want to resuscitate the agricultural side, we're going to host a Strawberry Festival, which they did, and it's now the fifth year running. We now have six new farmers growing strawberries, so yeah, so does the store that entire year, what would I do for if I had the resources and the capacity, I would start with asset mapping  
[Respondent B, Intermediary, Western Cape, 2022/03/30]*

As always, these stories come from a context that is more complex than it first seems, but this report makes a simple point: people have to be assisted, and there is a good prospect that – being informed – they might learn and succeed in their enterprise.

### 3.3.3 Systems and technology management

Asset mapping arose only occasionally, but combined with appropriate technical and systems support for gathering, maintaining and disseminating information about available assets can be very helpful. Taking culinary experience opportunities as an example:

*Culinary mapping has been used to identify and promote culinary cultures in areas as diverse as Spain, Thailand, Peru, Japan, Malaysia and Korea (Zhang, 2015). In the USA, the Appalachian Regional Commission has devised the Bon Appetit! Bon Appalachia! campaign to sustain regional economic development. The Appalachian map provides a guide to the Region's diversity and abundance of local food destinations that would be of interest to tourists (ARC 2013). On an interactive food map, eateries and restaurants can also be combined with other attractions and activities, thereby stimulating local tourism holistically. Cultural mapping can be combined with culinary mapping (Lubbe, 2003:91), as has been done by municipalities in Ontario (Ecovue, 2011).  
[Internet, Literature, Internet, 2022/03/28]*

For the purposes of this project, and in response to the required deliverables, a gastronomic map of South Africa has been prepared (see Annex 5) using Google Maps as the platform. Google Maps came up frequently as a favoured tool for deciding what to do, in conjunction with other tools:

*When we're in the UK, we always use Google Maps to get us from A to B, when we walk, or whatever, we book everything. Research: we do everything online, research people, everything online. So really, we can do more technical point of view. And other things I've thought about is South Africa is rich in history, local history and social history, the museums tend to be very important. I think the one when I sat down in the summer, what's the name of that? Piketberg?  
[Respondent C, Foreign tourist, UK, 2022/03/24]*

There are other examples, but one intermediary sees online skills as critical, but not really understood by government officials according to their sceptical perspective. They make an interesting suggestion skirting around the question of experience and competence:

*... I'm just thinking. In South Africa, the success stories, I would say, would be the likes of the Midlands meander, sophisticated, not rich, smart operators doing smart things. What I would suggest if I was a change agent in national, I would set up a standing task team of about six tourism experts with a lot of experience, and go to each province. For a month or six weeks, you do Northwest, and you meet up with the department, you go visit the outlying regions, and what they're going to have to do is introduce the tourism sector to their very own government, to their very own local industry. Because the municipalities are staffed by people who are either political hacks, or they're friends and relations of politicians. They appoint people because tourism is seen as easy to do, going to a restaurant or whatever. They don't*

realize how difficult tourism is. So they appoint the mayor's second cousin to keep the seat warm. They've not the faintest idea what they doing. So with local economic development led as a portfolio, they fill it with low grade people. So what one needs to do is to have this task team, and you go district by district, local by local and even town by town, you might be in an extended task team, okay, because otherwise these people get more but anyway, yeah. And you actually Google beforehand, and you say, "Yeah, is somebody doing guided tours here? Somebody's doing a game farm? Yes". And anyway, you get those people in take government officials to meet them. You know, few government officials have ever been tourists. You've never actually made a tourism booking. They might have travelled, but not as tourists.

[Respondent J, Intermediary, Free state, 2022/04/13]

There is an argument that good information management systems – user-friendly and accessible – can equalize the “playing field” and improve understanding all round. Consider this report about booking systems:

One of the things we liked about coming to South Africa was the Sanparks website – it's actually pretty good. It allowed us for example, to book a holiday in Kruger, almost 12 months ahead, to get decent accommodation that we'd like. Yeah, and that kind of technology. And it was easy enough, but making that kind of technology easier really does help because I use that for book a lot of stuff already. Well in advance. So I get what I want. And one of the things they could promote more is they have a very, very good refund policy. So when you when you book it, if you cancel 31 days before, you get all your money back. But that's not evident until you get through into the website. So I found that out, but if they promoted that kind of thing, it might encourage people overseas, especially to book more because when you're coming from a long way away, you want to know you're going to get what you want. If you can't make it that you can get your money back. Yeah,

[Respondent D, Foreign tourist, 2022/04/05:1900]

Well done Sanparks?

Effective development and deployment of tourism-related systems will benefit from centralised oversight and design guidance.

### 3.3.4 Marketing management

Tourists have perceptions and expectations that can be manipulated with well-directed marketing. Current perceptions suggest that tourism promotion and focus needs to be opened up:

We love history and social history and we love new things. And there are many one gets in big cities, I suppose. But that interests us. A lot of people are into art galleries and things which we would never go anywhere near. So perhaps it's subjective, I'm not sure. But we enjoy that anyways. And they don't promote any history except apartheid! That is the one thing that everyone thinks is actually worth mentioning when we say we spent time in South Africa. [For some who have not been there] it's still got that quick reaction. "Ah! isn't it violent, or people get killed, or people get murdered! It doesn't really feel that way when we're out there. We don't feel no more nervous than here, but if people haven't been there, it's a shame really, because ... Is this an impossible message to get down to the South African government, or anyone else? Get the message out? To the tourists? I know you can't get around that, the only way is for people to go out and be there. Friends of ours have been very concerned about it more than once. So, you know, it's not an easy way to get around.

[Respondent C, Foreign tourist, UK, 2022/03/24]

Web sites and conferences are part of the story when it comes to building a brand:

The Karoo region is also becoming more conscious of itself as a distinctive region, as is reflected in the multi-faceted website [www.karoospace.co.za](http://www.karoospace.co.za). The Karoo Development Foundation has organised several Karoo-based development conferences, including two popular “Karoo Parliament” events, in 2012 and 2013. The KDF has registered the “Karoo Lamb Brand” on behalf of the people and producers of the Karoo, and this has steadily improved the marketability and prices of this notable Karoo product.

[Internet, Literature, Internet, 2022/03/28]

It seems that “marketing” is needed in both directions:

*So in that sense, instinctively, this town is heading in the right direction. I don't think strategically it is as well planned as that it has instinctively become an art style. Now, we just need to delve and look at our gems that are hidden. So instead of when I encountered this vast landscape of people that were not involved in tourism, the first thing that I needed to do was to create relationships to nurture, relationships because through relationships you both and trust, what you cannot do is impose tourism on a community, you have to work from the bottom if so that the ideas come from the community, the only way you're going to get that is if you have a relationship with somebody in the community, the trust of that person, to actually help them come up with ideas, to stimulate and create such an awareness of the potential that they generate their own ideas.*

*[Respondent B, Intermediary, Western Cape, 2022/03/30]*

## 4 Responsibility matrix

With a framework in place, it is necessary to discuss and agree who does what. There are at least three key groups involved:

- The Department of Tourism
- The Provinces
- The project “Champions” who originate the idea of new projects

The role of the Champions is particularly important to recognise and position in the placement of responsibilities but we should not exclude other players who may be considered important or useful.

An arrangement of involvement and responsibilities (“I” and “R”) is provided below, based on the whole framework and the presumed availability of the Department, Provinces, and project Champions:

Value Chain Activity	DoT	Prov	Champ	Notes
<b>Preliminary</b>	All role-players need to review and agree the proposals herein below, with any amendments that might be decided. Yes, consultation is needed with the provinces. What do we already have?			
<b>Secondary (support)</b>				
Financial management	R	I	I	At least four categories of project?
Human and material resource management	I	I	R	Reliance on Volunteers and NPOs?
Systems and technology management	R	I	I	Core systems with national and provincial dependencies have to be centralised – some leeway needed for actual projects.
Marketing management	I	I	R	Depends on category of project.
<b>Primary (value adding)</b>				
Define sectors	I	R	I	Align with provincial medium-term plans?
Set boundaries	I	I	R	Has to be done by champions using clear guidelines from DoT.
Identify projects	I	I	R	
Identify projects	I	I	R	
Hand over	R	I	I	Includes approval and risk mitigation.
Support implementation	R	I	I	Depends on category of project.
Monitor outcomes	R	I	I	Feedback is important to ensure learning and ultimate success.

This is still a high-level view of what must be done: at least one more layer of detail must be added. However, further details of involvement and responsibility are left as a matter for review and discussion.

## 5 Final thoughts

This study is based on inputs from representative stakeholders, giving valuable insight into the challenges faced by any new tourism initiative and revealing some opportunities. However, whilst the evidence is indicative it cannot be seen as conclusive. At certain points in this report the need for more reflection and discussion is noted, especially with ideas for innovative *programme* as well as *project* management, and relation to ideas related to *information systems* and *technology-based* development.

Further, it is necessary to review the framework and underlying ideas in light of any short- and medium-term strategies within the Department and Provinces: the intention to address economic and community development, and culture and history, really depend entirely upon inspection of the details of project proposals that are submitted which should of course reflect the detail of any calls for proposals that are issued. A well-formed process for reviewing, evaluating and approving project proposals is needed that properly reflects the strategic intentions.

Finally, it is apparent that success originates from those individuals that have the vision, commitment and capability to drive new ideas through to success – the project champions – the development of new tourism projects – gastronomic or otherwise – is a process that must be allowed to come from the bottom up, rather than from the top down.

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## Annex 1 – Project Deliverables

In the notes below, the recorded project deliverables from the SLA are presented verbatim, in red, and are interleaved with related notes, in italics, about how they have been addressed. Some of the notes have been incorporated into the above text presenting and explaining the Framework.

### 6 PROJECT DELIVERABLES

6.1 The Service Provider shall conduct the Project and submit to the Department a written Project report and a PowerPoint Presentation of the summarized version of the report on the attainment of the following milestones in the deliverables in accordance with Annexure "A" of this Agreement:

6.1.1 Explore the opportunities presented by the gastronomic/food sector as a key component of tourism.

#### **Approach to exploration**

*Opportunities have been explored comprehensively, from the perspective of representative stakeholders: tourists, tourism service providers, and tourism intermediaries.*

#### **The place of gastronomic tourism**

*It has been found that gastronomic tourism is almost universally seen as just one feature of a much wider approach to tourism. Only one respondent reported one vacation that was focused on gastronomy (in India). It follows that there is little or no latent demand for gastronomic tourism, and a major effort may be needed to awaken it.*

6.1.2 To assess the potential of local food/culinary sector as a tool to develop small businesses and tourism destination marketing for the province Provide (sic) guidance on development of promotional and marketing strategies and tools for the development of culinary tourism at local, provincial and national levels.

*This objective seems to be a complex mixture of sub-objectives, focused on development of small businesses at ALL levels by means of strategic marketing and appropriate tools. Perhaps it was intended to be two paragraphs? Nevertheless, it is possible to unpack what is given as follows ...*

#### **Small and start-up businesses**

*Tourism development has been (and will continue to be) happening at all levels, but there are some examples of start-up and small-business initiatives that demonstrate the critical success factors. Primarily, according to the evidence available, a "champion" is needed who has the influence, leverage and capability to nurture and support the efforts of others who are less able, but just as committed.*

#### **Larger initiatives**

*There are also examples of larger tourism initiatives, some transiting provincial boundaries. But they are large for different reasons: some may have geographic spread and some a wide range of specific offerings. The criteria for success may well be quite different in different circumstances.*

#### **The role of the provinces**

*The first sign of difficulty with the political context of tourism came with a comment that any initiative that crossed provincial borders would suffer from impossible political contention; where there was evidence of effective support from local government, for example a rural town council, there was no evidence of support from provinces. That does not indicate that there is none, just that amongst the respondents involved there were only negative feelings, and an unwillingness to get*

involved with provincial administrations. It must also be noted that not all provinces were represented in the sample.

**Strategy formulation and tools**

Strategic analysis and tools for undertaking it are very well-established and are routinely used in progressive organisations. Two tools were chosen for this study: The Value Chain<sup>4</sup> and the Product Portfolio Matrix<sup>5</sup> (see the seminal references below); neither are complex or difficult – the first simply allows the tracking of cost and value-created, and the second originates from the Boston Consulting Group<sup>6</sup>. In the report the outcome can be seen in Figures 1 through 3, and the available data has been used to adapt the details to the current situation.

**More data needed?**

As has been noted in correspondence, there is little data available from provinces; to drill down further, with provincial needs and opportunities in mind, clearly requires more data than is available. This is left as a matter for discussion.

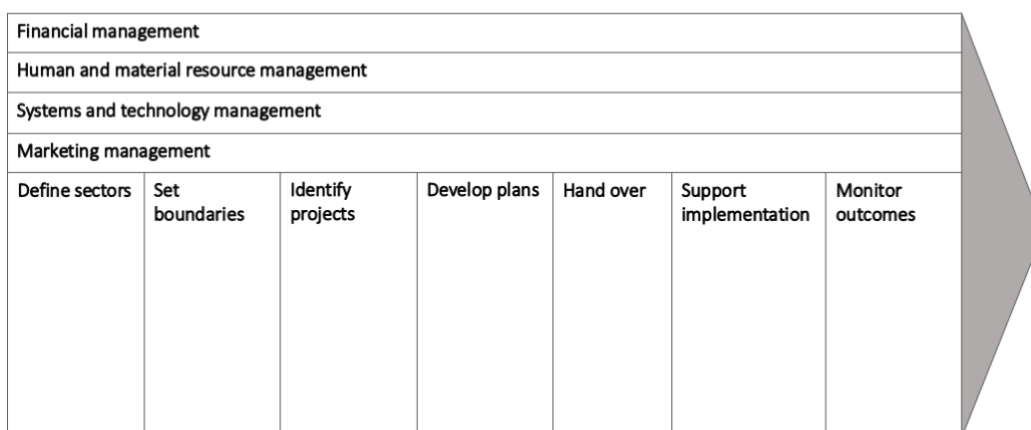
**6.1.3 To develop a framework that will guide the culinary tourism sector in South Africa through the development of a multi-stakeholder approach to co-creating value through tourism.**

**Frameworks**

A diversion: There are two kinds of “framework” that are used to describe organisational form: one based on the **things that have to be managed**, and one based on the **processes** that are to be undertaken. The “process” view is generally easier to work with because people naturally want to know what they must do; the “things to manage” view is abstract, but more powerful because in effect it defines what an organisation is about, and that is generally unchanging and in some sense fundamental – on the other hand there are always many ways to run an organisation and they often change.

Guiding the development of a multi-stakeholder approach requires the definition of a process, and that is provided in Figure 1 of the report, reproduced here:

**Culinary project “value chain”**



<sup>4</sup> Porter, Michael. Competitive Advantage: Creating and Sustaining Superior Performance. New York: Free Press, 1985.

<sup>5</sup> McFarlan, F Warren. ‘Information Technology Changes the Way You Compete’. Harvard Business Review 62, no. 3 (1984): 98–103.

<sup>6</sup> Morrison, Alan, and Robin Wensley. ‘Boxing up or Boxed in?: A Short History of the Boston Consulting Group Share/Growth Matrix’. Journal of Marketing Management 7, no. 2 (1991): 105–29.



The seven activities in the lower part – generally referred to as the “Primary” activities – indicate how the Department, working with its partners, can deliver value through delivering new tourism projects. The four activities above – generally referred to as the “Secondary” activities – indicate the support that is needed, appropriate finance, human resource, systems and marketing support, as tourism projects proceed.

The first four primary activities are discussed in the project report. This complete framework is open to review and further development, but the critical issue that arises is: **who should do this work?**

### Who does what?

An arrangement of involvement and responsibilities (“I” and “R”) is provided in the note that deals with the initial client comments (Disposition.docx, dated 6<sup>th</sup> June 2022), based on the whole framework and the presumed availability of the Department, Provinces, and project Champions:

Value Chain Activity	DoT	Prov	Champ	Notes
<b>Preliminary</b>	All role-players need to review and agree the proposals herein below, with any amendments that might be decided. Yes, consultation is needed with the provinces. What do we already have?			
<b>Secondary (support)</b>				
Financial management	R	I	I	At least four categories of project?
Human and material resource management	I	I	R	Reliance on Volunteers and NPOs?
Systems and technology management	R	I	I	Core systems with national and provincial dependencies have to be centralised – some leeway needed for actual projects.
Marketing management	I	I	R	Depends on category of project.
<b>Primary (value adding)</b>				
Define sectors	I	R	I	Align with provincial medium-term plans?
Set boundaries	I	I	R	Has to be done by champions using clear guidelines from DoT.
Identify projects	I	I	R	
Identify projects	I	I	R	
Hand over	R	I	I	Includes approval and risk mitigation.
Support implementation	R	I	I	Depends on category of project.
Monitor outcomes	R	I	I	Feedback is important to ensure learning and ultimate success.

Review and agreement of this arrangement of work and responsibilities is needed if any further work is to be useful.

6.1.4 To identify focus areas for development and investment in order to support the development of culinary tourism with a specific emphasis on the promotion and development of tourism culinary experiences across South Africa in order to showcase the country's history, heritage, cultures and geographic and agricultural diversity.

### **Focus areas?**

*The evidence accumulated in the data gathering indicates that the role of the “Project Champion” is absolutely central. A Champion with an idea is where it all starts, and whilst specific areas for development could be selected, the only criterion that emerges is that food and drink opportunities are rarely if ever sought in a South African tourism offering, it is just assumed, even by domestic tourists. If food and drink delight the tourist in some way then that is good, but basing the whole marketing effort on culinary and gastronomic opportunities alone will be an uphill struggle.*

*However, putting an emphasis on food within a wider package will start to shift the expectations of tourists and could be supported by a national or international campaign. There is one example that provides a starting point:*

*“Eat like a local” ( <https://eatlikealocal.co.za> ).*

*Although this particular service provider failed to respond to requests and was not one of the respondents, searching online for “Eat like a local” leads to walking tours, restaurants, and other experiences introducing food and drink to the mix. Hence, any service provider conforming to certain standards could be offered branding support, as well as finance and systems support if appropriate, in the same way that Airbnb and other intermediaries award “Superhost” status provided that agreed standards are met.*

6. 1.5 The framework must provide guidance to assist destination(s) to identify local culinary products and experiences. The framework must identify the steps provinces should take to develop a Culinary Tourism Strategy for each province and identify the potential support required and stakeholders to be considered. The framework must outline what is required to ensure specific emphasis on transformation through community development, poverty alleviation, focusing on women and youth empowerment and hence sustainable tourism.

### **Bottom-up not Top-down**

*The evidence indicates that the role of the project champion supersedes all else. Provinces should invite proposals, ensure that they are well-worked, and select according to the qualities expected. There is little evidence that strategies and projects can be forced into the market place, the process works when it is bottom-up, not top-down.*

*Having said that, the table of value chain activities and responsibilities above provides a starting point, and recognises that multiple stakeholders are involved.*

6.1.6 The framework must also provide guidance on development of promotional and marketing strategies and tools for the development of culinary tourism at local, provincial and national levels. State the opportunities presented by the culinary sector as a key component of tourism development in each province. Provide guidance to assist destination(s) to identify local culinary products and experiences.

### **Google Maps is everywhere**

*See comments on 6.1.5, above, but it is important to add that in all specific cases, the use of Google Maps to organise and manage a tour (and to find accommodation and sustenance) was ubiquitous. There needs to be a review of how Google Maps (and any other tools, such as <https://maps4africa.net> ?) can be incorporated into national support for provincial and local, tourism projects.*

6.1.7 develop a framework that will outline what is required to ensure specific emphasis on community development, poverty alleviation, focus on women and youth empowerment, hence sustainable tourism. The report must also show how the development of the culinary sector amongst other measures can be used as post COVID-19 crisis recovery strategy, re-ignite domestic tourism after the negative impact of the COVID-19 pandemic on the sector.

### **Post Covid**

*Whilst there was evidence of the human resource shortages arising from Covid, as well as the lack of demand, there was no evidence of tactics that would support food and drink as a factor in recovering from Covid. The reference to “domestic tourism” seems to exclude international tourism, is that intended?*

6.1.8 To. Assess the potential of local culinary sector as a tool to develop small businesses and tourism destination marketing for the provinces. Propose the strategy required to promote culinary tourism in each province.

*Repetition? See 6.1.2 above.*

6.1.9 Produce a Food Festival Calendar and map of existing festivals in the Country.

*Done. A response to what has been provided is awaited. As noted in the report, any use of the Google Map and Calendar needs to acknowledge that the food industry is volatile, and both restaurants and festivals are subject to uncertainties of availability and actual service offerings. A process is needed to maintain and manage the tables that drive these Google reports.*

6.1.10 Submit evidence in line with all reports (reports in word, excel and power point).

6.1.11 Regular reporting of performance reports to the Department and necessary platform or committee in line with required reporting guidelines which guidelines may be reviewed from time to time.

6.1.12 Preparing and presenting (in collaboration with the Department) any project related reports to the relevant stakeholders from whom inputs and insight will be required.

6.1.13 Present the finalized document to the Department for approval within the agreed timelines.

*No comment needed on the above?*

6.1.14 The overall framework must be aligned to the Guidelines for the Development of Gastronomy Tourism, UNWTO, 2019, ISBN 978-92-844-2094.

*Done – see Section 2.3 of the Final Report*

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## Annex 2 – Method

### Work plan

The project developed a conceptual model to provide proper foundations, and then set about the collection of data in four ways:

- Existing reports and published papers were summarized in a review of prior work.
- Focus groups were organized and scheduled in different locations.
- A survey was launched in order to gather quantitative data.
- Face-to-face (Zoom) Interviews were undertaken with more than 25 typical stakeholder groups: international and domestic tourists, tourism service providers, and intermediaries of different kinds.

The interviews have provided the bulk of the qualitative data, supported by the literature review and the focus group records. The survey drew only a few responses and was discarded. The evidence gained was then subject to an intensive qualitative analysis loosely based on the Conceptual model established at the start.

### Conceptual Model

The Conceptual Model is shown graphically in Annex 3. It has ten components:

#### *Gastronomy project*

At the heart of the study is the gastronomy project, interpreted quite liberally as a single entrepreneur, or a community, or a town, or something larger. Organising support for gastronomy projects needs to recognise that risks and opportunities are quite different at different levels.

#### *Stakeholder*

A stakeholder is any individual or entity that is impacted by gastronomy tourism, or that can impact gastronomy tourism themselves – it is a matter of inter-dependency.

#### *Co-operation*

Many of the problems arising in gastronomy tourism come from the need for co-operation between stakeholder groups. Much of the evidence gathered indicates a need to pay special attention to the boundaries between groups.

#### *Involvement*

It is the involvement of people with gastronomy tourism projects that makes them real, and leads to outcomes of one kind or another for individual stakeholders.

#### *Outcomes*

Outcomes can be good or bad. Also, they might be short-term, medium-term, or long-term (and therefore sustainable).

#### *Inputs*

Any project requires inputs, both human and material resources. The availability or non-availability of resources affects the prospects for any project.

#### *Innovation*

An important aspect of collective efforts to develop sustainable economic activity is to grasp opportunities to innovate. Not only with technology, but also be devising new business processes and new tourism products.

### *Constraints*

Circumstances do not always favour new and developing projects, and respondents were not shy of reporting the challenges that they face.

### *Impact*

It is common to separate *outputs*, *outcomes*, and *impact*. The data provides more evidence of outputs rather than outcomes and impact.

### *Standards*

There is the possibility to judge the quality of a product or service by means of standards, and so a project needs to be aware of any standards that might prevail.

### *Service excellence*

Perceptions of service may or may not align with expected or even actual service, and any means to assess these factors would be helpful in sustaining a project.

## Data sources

As indicated at the start of this section, there were four principal sources of data:

### *Literature review*

Existing academic papers, practitioner reports and other published papers were gathered and summarized in a 28-page review, with about 150 references. Key features of this material, mostly reviewing recent projects and identifying trends, have been incorporated.

### *Focus groups*

Focus groups were organized and scheduled in different locations; the results were limited, but have been transcribed and are incorporated here.

### *Survey*

A survey was launched in order to gather quantitative data. The results were very limited and have been discarded. It has been noted that generally people feel that there have been too many surveys with no useful outcome.

### *Interviews*

Face-to-face (Zoom) Interviews were undertaken with more than 25 “representative” stakeholders – not representative in terms of numbers, but rather variety: international and domestic tourists, tourism service providers, and intermediaries of different kinds. This material comprises the bulk (but not all) of the data that has been analysed

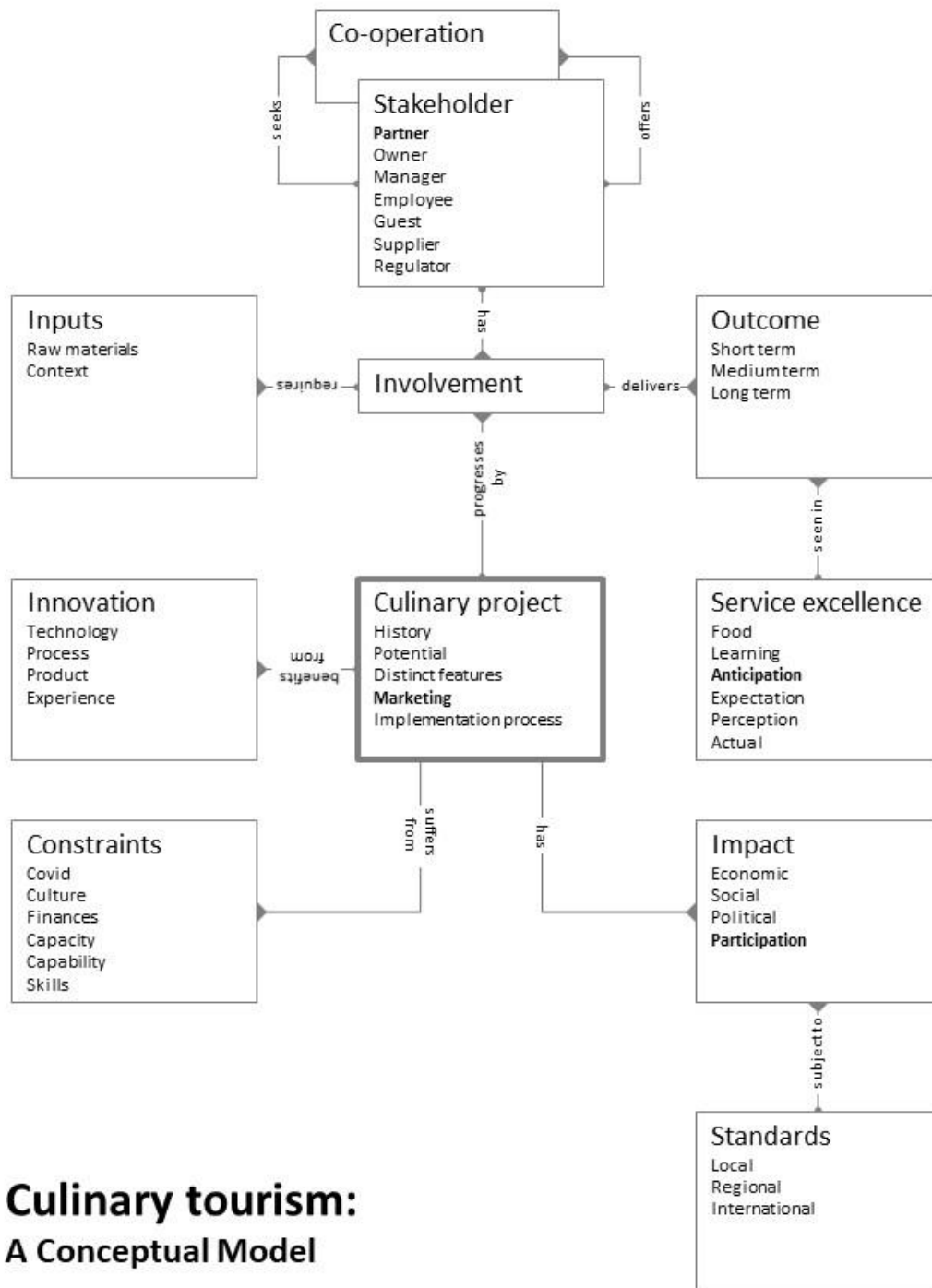
## Data analysis

Analysing qualitative data is a subjective process, depending on the direction adopted by the analyst but organised (in this case) with the conceptual model in mind. In summary, the qualitative data, comprising more than 63,000 spoken words *before* analysis, was analysed and led to:

- 29 Sources (people or published articles)
- 425 “Chunks” (portions of text with significant content)
- 2042 “Denotata” (words and phrases denoting a category)
- 63 “Categories” (topics we need to understand)
- 31,652 Substantive words (within the text, excluding common words)

Categories are based on (and organized within) the concept model reviewed and agreed earlier in the project (see Annex 3).

Annex 3 – Conceptual Model



AJB/2022-02-25

## Annex 4 – Results

The analysis of the data that now follows delves into the detail, providing evidence that guides finalization of the implementation plan.

In the notes that follow, there are *illustrative* quotations from the transcribed conversations with respondents, but it is important that while they were not chosen at random there are many other instances where respondents touched on the matters at hand - 200

### First results

An early analysis of the data counts denotata within each of the nine principal categories (from the concept model) and gives some initial insight (see Attachment 2). Analysis of the data delves into the detail, and derives an indication of the main problems and opportunities, providing a firm foundation for finalization of the implementation plan.

If all categories are plotted for the frequency of occurrence (without regard to the concept model), then we get the following distribution:

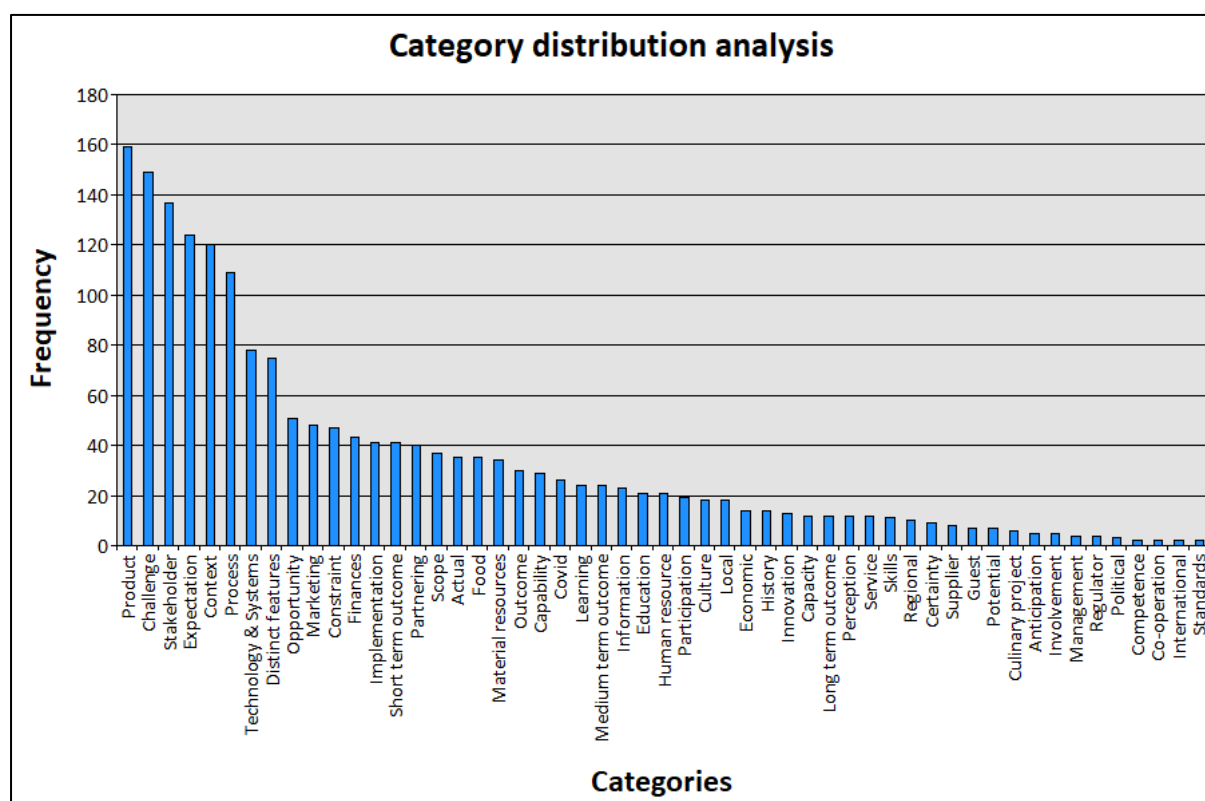
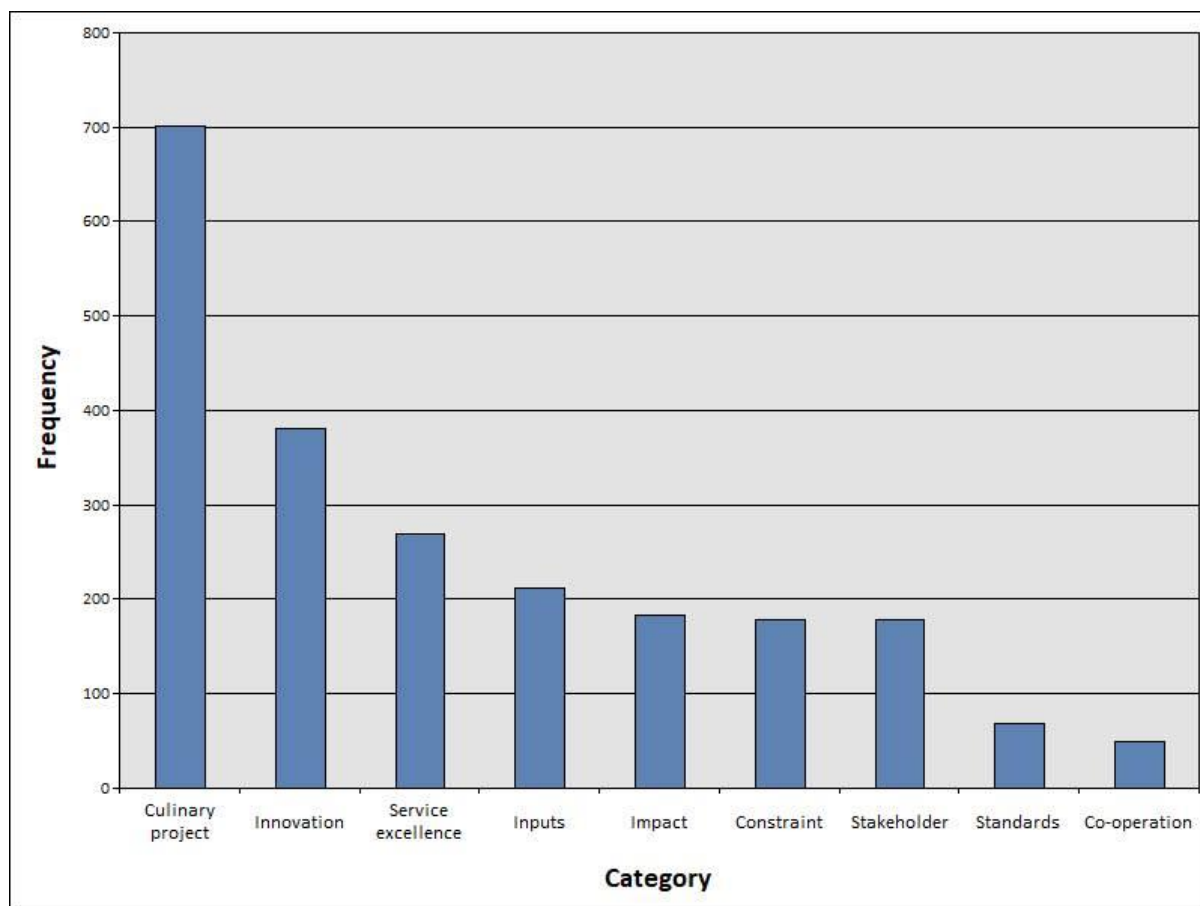


Figure 4 Category counts for all Categories

We find that respondents wanted to talk about their product (for the present purpose “product” is taken to include “service”), and about their challenges. Stakeholder references were of course common, as well as details about their expectations, the context within which they were working, and the processes that delivered their product (or service). Then (interestingly) comments about technology and systems followed, and the features of their products (or services), and so on.

It is more useful, however, to look at the results according to the components of the conceptual model – a better starting point for a “deep dive”.



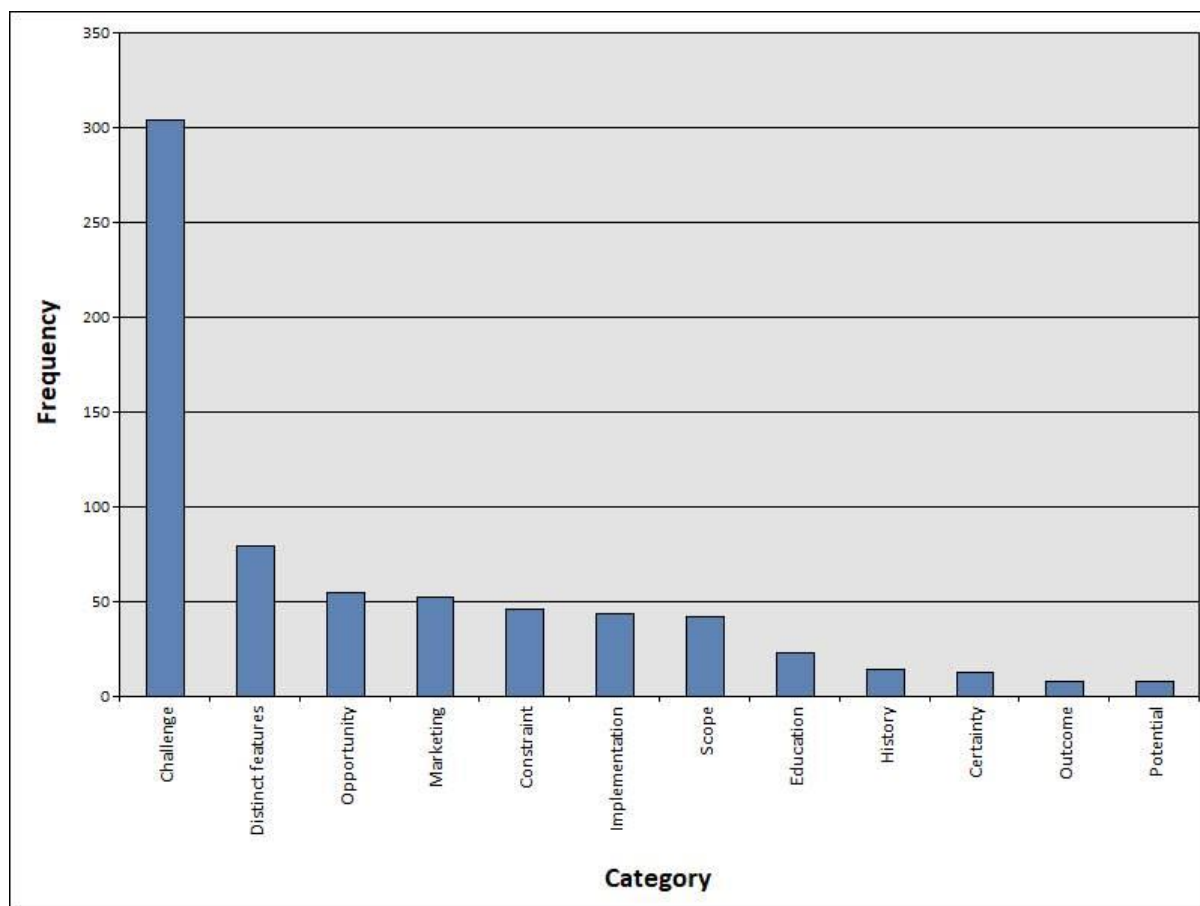


**Figure 5 Category counts for the nine components of the Conceptual Model**

Categories are actually gathered within the nine components of the Conceptual Model, and taken all together within each component we find the relative significance of each (according to whether the respondent chose to raise it). We can look at each in more detail.

*Gastronomy project*

The idea of a gastronomy project lies at the heart of this project. In talking about projects respondents raised a range of factors that affected them, predominantly the challenges that they faced, but also distinctive features, marketing, constraints, further opportunities and so on, as indicated in the chart:



**Figure 6 Categories within “Culinary project”**

There is overwhelming concern with the challenges of running a project. The Department is not exempt because of the problems with permits:

*We're completely and utterly screwed because of the Department of Tourism, no new operators can come in. And I don't understand why people have not been screaming from the hills, that there is absolutely no way for new entrants to come into this industry. Nationally, nobody can get a permit for a vehicle.*

[Respondent S, Cape Town, 2022/04/11:1000]

and with perceived problems with major development initiatives:

*Another thing, which is a very big problem, is the business incubating side of things. There's so many loose silos that are operating, including the Department of Tourism, that has just spent a chunk of money in operating a tourism incubating process over the last three years – I'm not saying it's useless - any kind of education is a good thing - but they've kind of left these guys a little bit in the lurch.*

[Respondent O, Limpopo, 2022/04/13:0900]

There are difficulties with co-operation and partnering:

*And I think that's where when we talk about innovation, I think a lot has to do with ways of thinking. And a lot of times you go in, and I just see blank walls. No, this can't be done. Why can't be done? Too much money. So that's what I do every day.*

[Respondent H, SA, 2022/04/08:1600]

and with gaining support because people don't understand the economics:

*Understanding that tourism contributed 25% of the GDP of the town because they kept on cutting the budget. And we had less than less than days to work with. So if that is the GDP of a town, you should sit*

*up and smell the roses. Not in this town!*  
[Respondent B, Western Cape, 2022/03/30]

It seems to be possible to reach too far:

*So the ANC system is a built in, jockeying between provinces, power game, which is brutal, you know, so the thought of actually having a tourist project that we both have them, or three of them, it doesn't even get on the agenda.*

[Respondent F, Free state, 2022/04/13]

Perceptions about crime are a recurring issue, even in more remote areas:

*The other issue is crime within the areas – crime plays a huge part in whether people come to a rural place like ours, which is quite rural, in terms of other areas in South Africa.*

[Respondent E, Western Cape, 2022/04/06:1000]

In a less contentious context, COVID was often referred to, but not quite as often as might be expected:

*Well, the various festivals that they used to have which used to draw a lot of people has sort of fallen by the wayside. I don't know if the festival is going to happen this year, because due to COVID it did lapse.*

[Respondent G, 2022/03/30]

It is more encouraging to see that there are opportunities with distinguishing features:

*You've got the main cities and you've got the beaches and the game parks. And then you've got all the other parts like the little Karoo and all the all the small towns. Yeah, just jammed. it's like, there's an A list, a B list, and a C list. So if you come more than once, you can do the A list the first time, and then the B list the second time, then the C? There are some things in South Africa that basically you can only see there.*

[Respondent D, 2022/04/05:1900]

## Stakeholders

A wide range of stakeholders was evident. Here is a complete list of stakeholder groups identified – clearly there are overlaps, but the actual words of the respondents are preserved:

Agents	Fancy lodges	Local government	Smaller businesses
Airbnb	Farm stalls	Local guides	Smaller operators
Airline	Farmers	Local tour operator	Small-town municipalities
Artists	Food & wine tour operator	Lodges	South African Tourism
Backpackers	Food processing centres	Minister of Agriculture	Students
Cafes	Food producers	Minister of Tourism	Tea gardens
Casino	Fruit-picking sites	Minister of Transport	Technicians
Chauffeur	Government	Municipalities	Tour guides
Chefs	Guesthouses	NPOs	Tour operators
Companies	Guides	Operators	Tourism Association
Conscious travellers	High-end people	Owners	Tourists
Cooks	Hosts	Partners/Spouses	Township operators
Dept of Education	Hotels	Politicians	Travel agent
Dept of Tourism	Independent travellers	Provinces	Uber
Dept of Transport	Insurance companies	Provincial Tourism Assns	Videographer
Digital nomads	International operators	Pubs	Volunteers
Districts	International tourists	Restaurants	Wesgro
Drivers	International travellers	Rotary	Wine estates
Eateries	Interpreters	Rural farms	Wine farm
Extension officers	Journalists	SATSA	

The kinds of stakeholder varied widely as can be seen, from the obvious to the less obvious:

*Well, it died until eventually somebody from Wesgro combined it with the South African wine event that was held in the second year. And I sat on the committee but we weren't talking the same language.*  
 [Respondent M, Western Cape, 2022/03/29:1400]

The importance of supportive collaboration in delivering successful gastronomy projects is self-evident. It is said by some that one outcome of COVID-19 is that it has brought many organisations closer together in overcoming the challenges of the pandemic. Perusal of the long list above might bring specific examples to mind for those readers involved in the tourism and gastronomy sectors.

Also a little surprising Perhaps as a result of the pandemic, human resource shortages are a recurring feature of the interviews and it was interesting to find a focus on volunteers, and the means to reward them:

*We need a way of managing these volunteers, that makes it a little bit different, a lot better, even to some extent rewarding. Volunteers get tea with Alan Winde as a reward, so people say "Oh, this is really nice to be able to meet, mingle and know them!", tell their friends, get photo ops, et cetera, et cetera, et cetera.*  
 [Respondent T, Western Cape, 2022/04/11:0900]

The nature of any reward does, of course, need to be carefully matched to the orientation of the volunteer.

Within the details, there is some evidence of the nature of stakeholder issues. Employees and Owners (of tourism service providers) are under-represented:

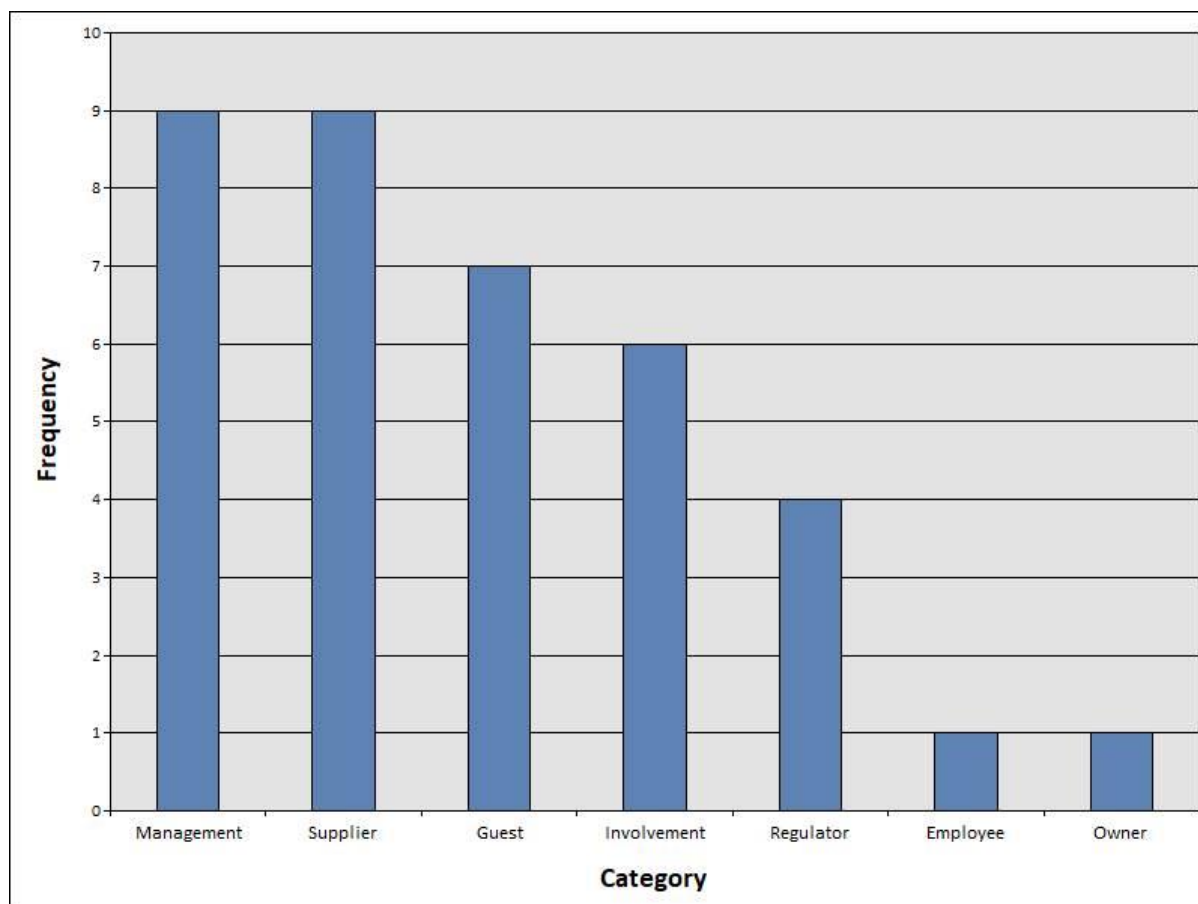


Figure 7 Results for “Stakeholder” details

### Co-operation

Co-operation is about partnering, which was one feature of many discussions. There were many references to the involvement of communities, businesses and government:

*Community participation and the formation of partnerships are the building blocks to gain the best local advantage and become competitive (Goodwin, 2003; Oliver & Jenkins, 2003) ... At the same time, there is also an important role for Government development agencies to encourage and assist such private-sector activities. Destination Marketing Offices and tourism information centres can help to keep data updated and accurate while District Councils and Municipalities can use the existing tourism database to enhance collaboration to counteract fragmentation in the Karoo Region.*

*[Internet, Literature, Internet, 2022/03/28]*

*Private, public private partnership, through municipality and the private sector, I had many other companies come on board ... We won the trust, we built relationships.*

*[Respondent B, Intermediary, Western Cape, 2022/03/30]*

But some of the more interesting examples were surprising – hotels, opera and food (and wine, no doubt):

*Join Chef Mike Basset and Cape Town Opera on this exciting culinary journey with musical direction from José Dias. Date: 31 March - 3 April 2022 Time: 19:00 Venue: Vineyard Hotel Bookings open on 1 March 2022 through Quicket.*

*[Internet, Literature, Cape Town Opera, Internet, 2022/02/26]*

At the front line (a rural retreat managed by a septuagenarian lady) we saw real evidence of government support:

*What could the South African government do to help this business, your business? Oh, well, with Covid, the government helped in the way that they paid. That was very good. And our insurance company paid two large amounts last year, which pulled us through. But we still struggling. I've got to get new batteries now for solar power. And I haven't got the resources I would normally have had that this time of year would have been full. January and February ... And times are still quite tough, also for the staff.*

*[Respondent N, Provider, Western Cape, 2022/03/19:1800]*

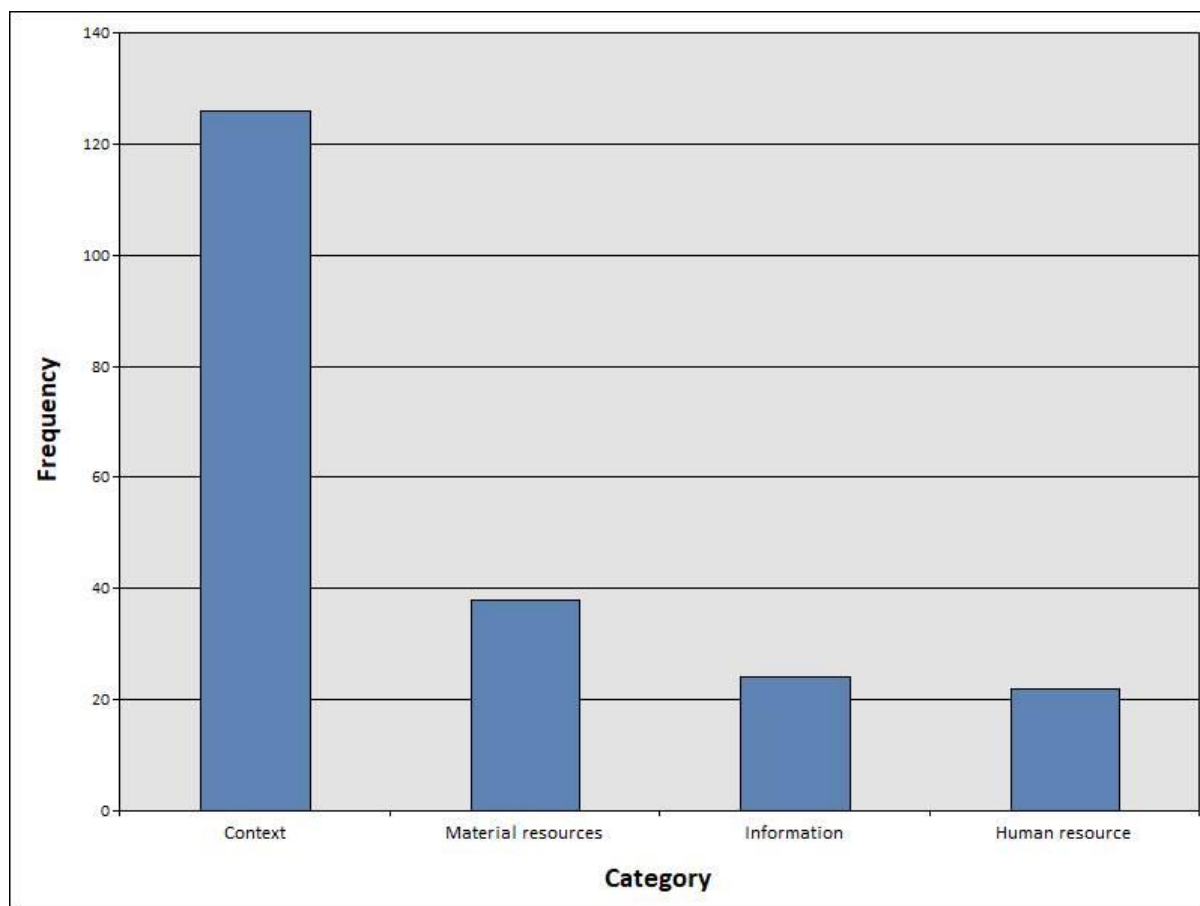
Finally, a quick question asking “anything else?) reminded us that there is the burden of administration and the need for systems to support small businesses:

*Are there any other “partnerships” here? Well, the accountant, the, the finance people, you have to submit accounts and do your bookkeeping as usual!*

*[Respondent L, Cape Town, 2022/04/05:1630]*

### Inputs

Discussions about requisite inputs was interesting – the need for material and human resources, and information, was predictable, but the number of concerns about understanding the *context* of an enterprise was predominant:



**Figure 8 Results for “Inputs” details**

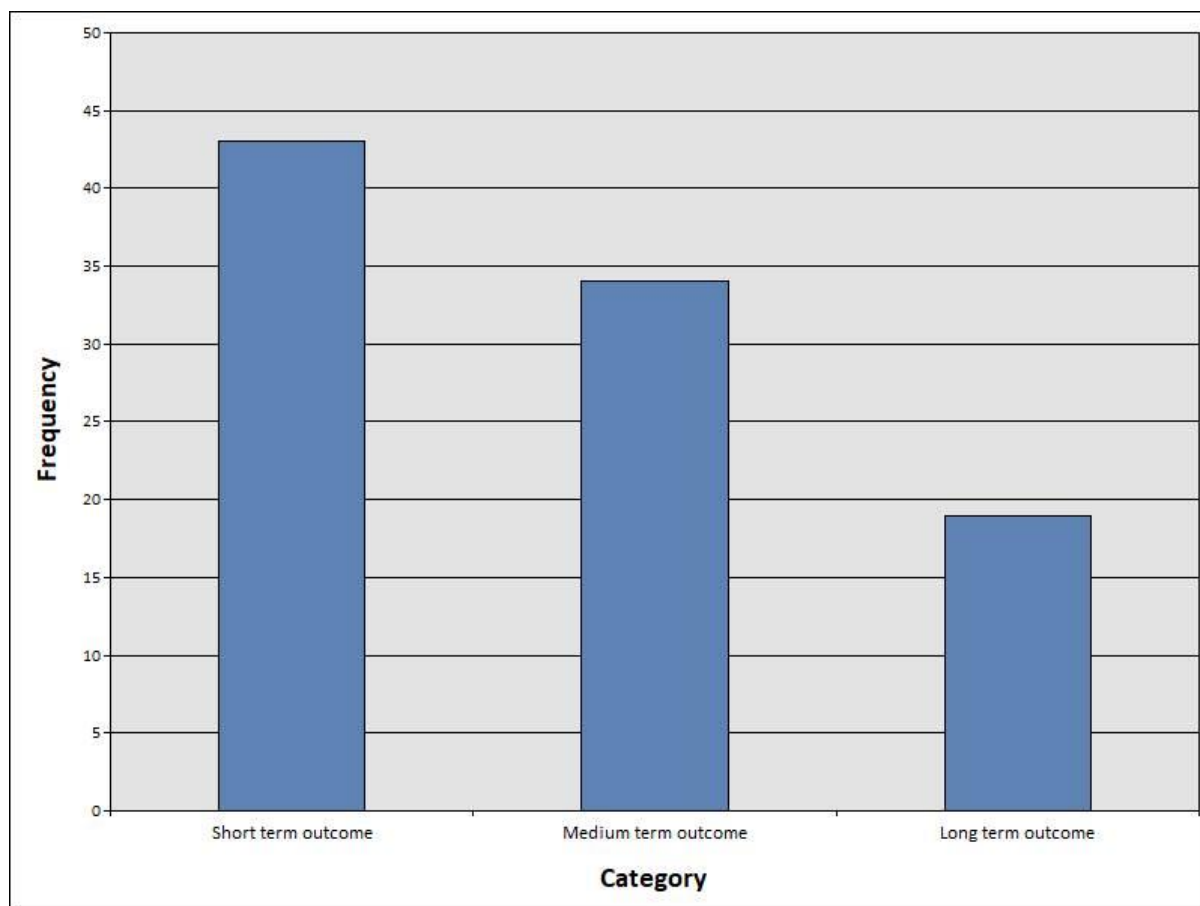
This really reveals the need to undertake a fully strategic approach, even at the lowest level of small and micro businesses; every business needs to understand its context, and that is a matter for strategic analysis, and proper recognition of the different kinds of context. It can be complicated:

*Tour operators and travel agents show tourists a finite direction with the twin objective of providing excellent opportunities of experiencing special cuisine, wine and social vibes of an alien land in one hand and enjoying the scenic beauty of the local landscapes on the other. Apart from the usual services of booking flights, arranging transport, organising travels and finding the best accommodations suiting your budget, they also work hard to locate the famous destinations known for its delicious food and wine. They also guide you in deciding on the best season in order to visit a culinary tourism destination. To illustrate the point, delicacies of jumbo prawns which may seem to be sent straight from the god’s kitchen are available in a particular season. Visiting the place in some other season may not be a wise choice.*

[Respondent E, Literature, Internet, 2022/03/28]

**Outcomes**

Outcomes were loosely divided into short, medium and long term. There was an emphasis on short term:



**Figure 9 Results for “Outcomes” details**

One respondent – a domestic tourist who had visited Rwanda and chose to speak about it – revealed a gastronomy disappointment:

*I think the trip to Rwanda was good all round and there was only one poor food experience. It is not worth remembering because it was not very good. So I won't go into that. But we found the people were just charming.*

*[Respondent M, Domestic tourist, Zoom, 2022/03/19]*

A hint of the importance of personal engagement with tourists. A travel agent, talking about a client, quoted what was heard:

*“I want to go to Italy, and eat pasta in Giovanni's House, made by his grandfather, on the AGA stove, I would place a much higher value for that experience than eating in an Italian restaurant, even Michelin! I walk away with a new friendship, with a new mindset.”*

*[Respondent B, Intermediary, Western Cape, 2022/03/30]*

For some respondents, a longer term outcome that will be cherished is the telling of stories. First, a project champion, talking about opportunities:

*I could make a meal, and somebody come to my house, and I could invite them and actually charge for it, I had a commodity that I could sell. I also have a commodity, if I have a voice. In other words, I could be a storyteller, I could be a singer, I could be an actor. And these things, they come naturally because they are inherent or they are inherited. It becomes a legacy.*

*[Respondent B, Intermediary, Western Cape, 2022/03/30]*

A domestic tourist recounts the story of one interesting start-up, that has been re-told often:

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*And even so, listening to the story of Suzy, who's in her late 60s ... she was telling us the story of how she used to work for Edgar's many, many, many years ago, and then Edgar's retrenched her, and how she then realized that she didn't have any other way to look after her three children. And she started cooking at the magistrate's office, she had a little spaza shop, and she started cooking there. And she's grown, how she's grown ... I promise you that gives me goose flesh.*

*[Respondent O, Domestic tourist, Limpopo, 2022/04/13:0900]*

And another champion, reflecting on what is possible:

*I travel a lot, I mean, my feet are already on the ground, and actually go into the houses of various people, see, tell the stories, because also life will move in response to storytelling; some people can't write, we forget about that, you know, the San, and there's a project up the west coast, the people that I interact with, they cannot write, they cannot read, but through an interpreter I get the most fantastic stories.*

*[Respondent M, Intermediary, SA, 2022/04/08:1600]*

At another level, but still concerning outcomes and how they can be measured, The the question of overall national statistics arose in one conversation:

*It makes me ask again, how we capture the data about how many people choose this, that or the other? If we're selling stuff at Woolworths, then we get very detailed information on how many people are buying winter jumpers in winter and so, and I guess we don't have that information do we? No you can do it. If they asked, they would get the number of dates that operators sold, they would get the number of bed nights that were occupied. I don't know whether there's any data for restaurants – each will have some kind of data on that – but the lady that does vetkoek in Beaufort West and sells on the road, I mean “Yeah, she's making a good living”, maybe only anecdotally?*

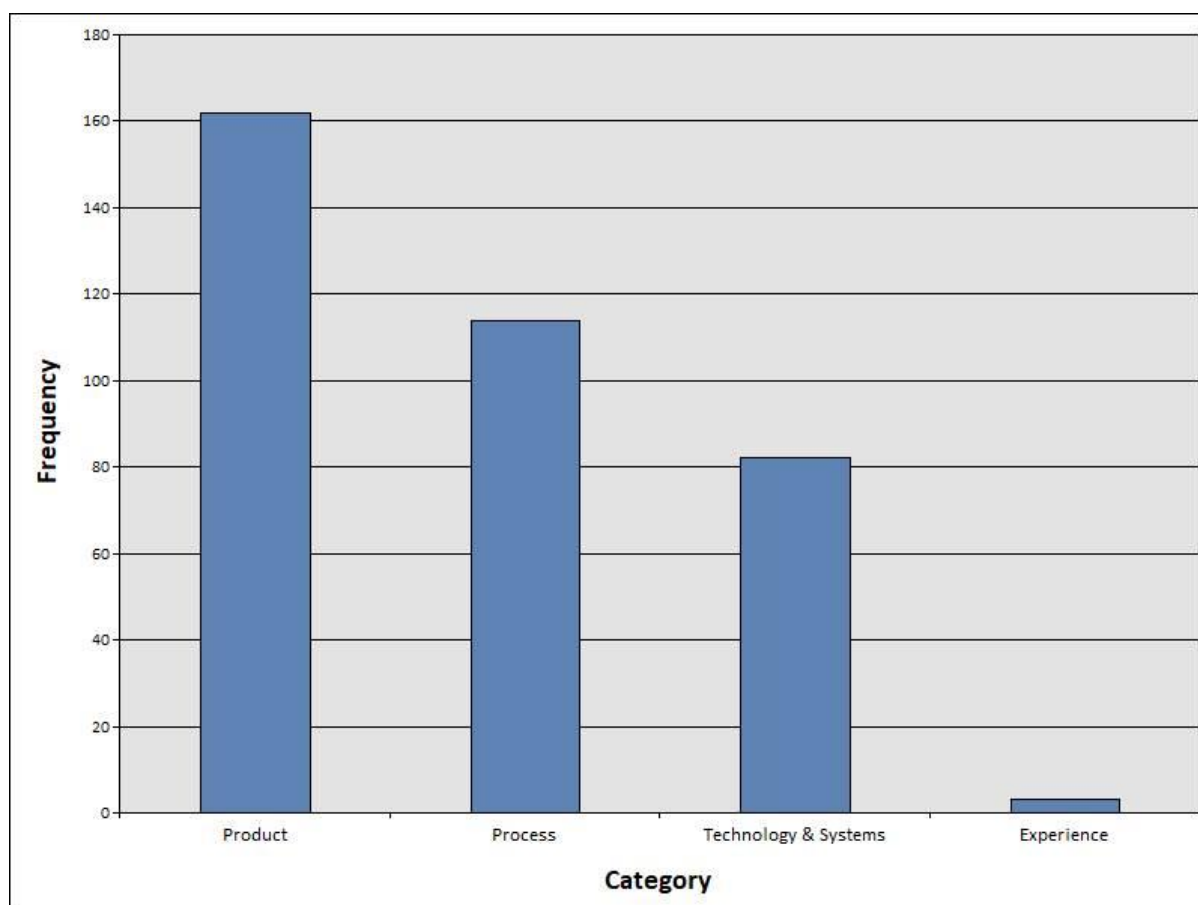
*[Respondent M, Provider, Western Cape, 2022/03/29:1400]*

If tourism is to be well managed nationally, then of course this kind of data is needed.

### ***Innovation***

An important feature of the study is to understand where there might be opportunities for innovation, and ideas were divided into categories:





**Figure 10 Results for “Innovation” details**

The constant drive to find new products arose:

*Travel agencies are pressed into a frantic race in order to offer their best. They are constantly looking into new creative areas of customer services including them into the package. Credentials and the trend in providing gratifying service are crucial factors that need a serious consideration prior to selecting the service of a travel agency.*

*[Literature, Internet, 2022/03/28]*

But the differences between product- and process-based innovation was evident. An interesting example of process innovation:

*I know a lot of people like to do the virtual touring, so they're touring from home. I'd rather be in the place experiencing it in real life. I was pleasantly surprised by when we went to Disney World ... you can check your bags directly from the airline straight through to a hotel, so you don't have to worry about your bags from when you load them onto the plane at home.*

*[Respondent 1, Foreign tourist, Ottawa, 2022/04/03:1600]*

There were many examples of ideas that were seen as (rightly or wrongly) as innovative:

*Explore your own backyard by walking the streets of Cape Town and dive headfirst into the ever-growing coffee scene. 3 Hours | Adult R770*

*[Literature, Internet, 2022/03/28]*

An old idea, that may be new and innovative in tourism, is the idea of Asset Mapping:

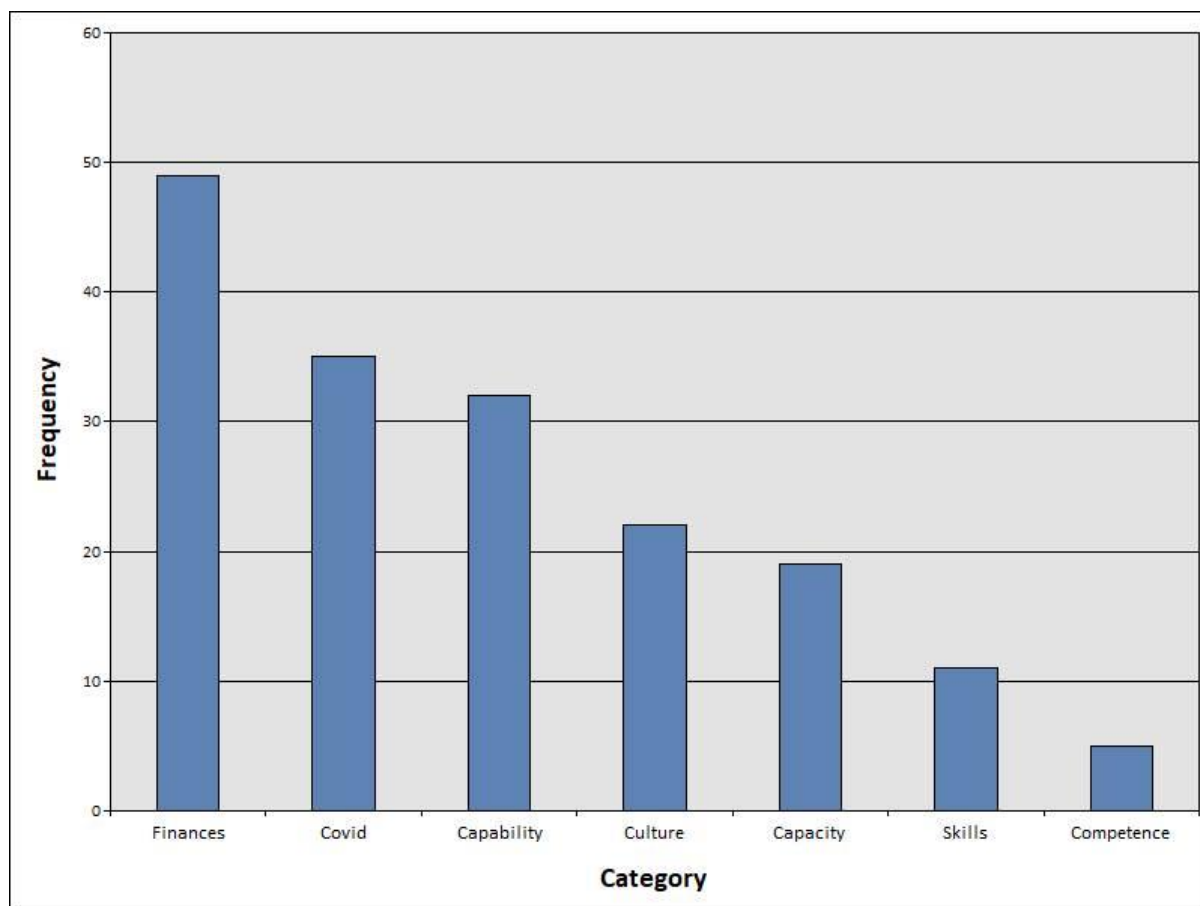
*Culinary mapping entails a process of collecting, recording, analysing and synthesising information in order to describe the culinary resources, networks, links and patterns of usage of travellers (Ecovue, 2011; Du Rand, 2014) (Source?). A culinary route or itinerary can then be constructed for food tourism as*

*a niche attraction in a region. Culinary assets are categorised to highlight key local cuisine styles, and to facilitate comparison with other regions and tourism destinations. A culinary map is a living map and sets the framework for further additions and revisions over time. Typically, four main categories of a region’s culinary assets can be identified, viz Geography, Food, Culture and Tourism: [Literature, Internet, 2022/03/28]*

Perhaps this idea deserves some attention.

**Constraints**

It is to be expected that respondents would rush to identify the constraints that hold them back:



**Figure 11 Results for “Constraints” details**

It is interesting to reflect on the differences between skills, competence and capability: “I can cook a meal” indicates a skill, but “I can cook a meal that delights the customer” is a higher-level idea that indicates capability; “I can cook a meal that brings the customers back repeatedly with their friends” indicates competence.

From the point of view of the tourism service provider side, financial constraints were firmly embedded:

*Understand that tourism contributed 25% of the GDP of the town but they kept on cutting the budget. So if that is the GDP of a town, you should sit up and smell the roses. If you just want to use this town as an example, you will see the geographic and the financial divide. [Respondent B, Intermediary, Western Cape, 2022/03/30]*

From the point of view of the tourist, there was an interesting comment about the 90-day visa rule:

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*We could stay longer! The three months limit is, for us, an annoyance. Because it's too hard to stay beyond three months, we would gladly stay six, and we would even pay for the three months extension, but it's so convoluted to get it it's not worth it ... it should be made much, much more simple for people who are coming, essentially with money, and wanting to spend it in your country.*

*[Respondent D, Foreign tourist, 2022/04/05:1900]*

Much remains to be done to address the many and various constraints.

### **Standards**

There were few references to “standards” of performance and most were very subjective:

*Since culinary tourism involves consumption of vegetarian and non-vegetarian food, one should ensure they are served fresh. Consuming stale food no doubts will invite serious health issues. Ensure that the food is served directly from the oven and not the refrigerated stuff.*

*[Literature, Internet, 2022/03/28]*

There was at least one example of success, where SA seems to exceed the expectations of international tourists:

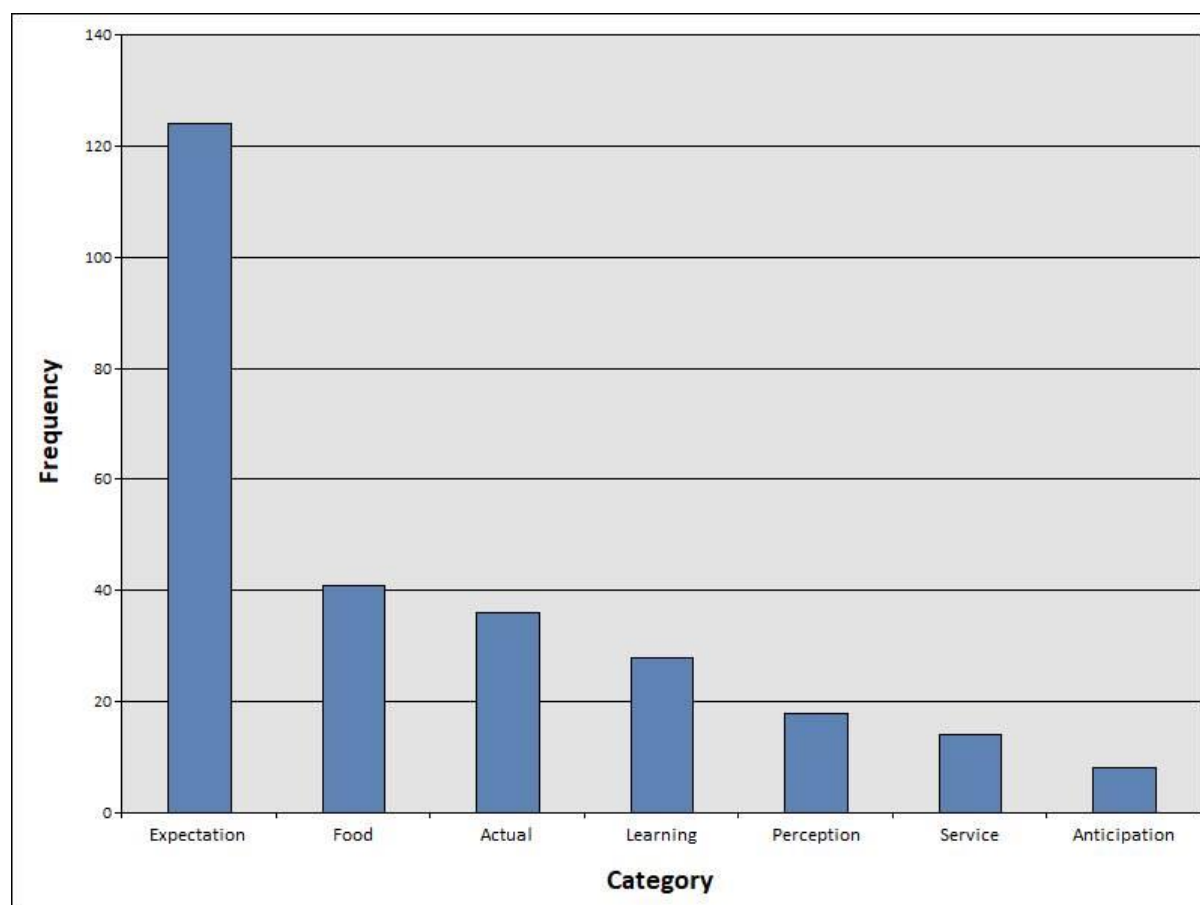
*One of the things we liked about coming to South Africa was the Sanparks website – it's actually pretty good. It allowed us for example, to book a holiday in Kruger, almost 12 months ahead, to get decent accommodation that we'd like ... And one of the things they could promote more is they have a very, very good refund policy ... if you cancel 31 days before, you get all your money back.*

*[Respondent D, Foreign tourist, 2022/04/05:1900]*

The wider matter of standards is left as a matter for further discussion.

### **Service excellence**

Evidence of the quality of service focused strongly on expectations rather than perceptions, or actual examples:



**Figure 12 Results for “Service excellence” details**

Again, it is complicated:

*Guides attempt to find a balance between their own interests, the clients, the local people, and their employers. The actions of guides are subject to the potentially disciplinary gaze of co-participants. Therefore, performance quality determines the level of visitor involvement and can be measured in visitor and employer expectations.*

*[Isaac Abe, Literature, Team, 2022/03/28]*

Some tourists are clear about what they want:

*We're gonna go to places where we've got interesting people, interesting culture, some interesting arts, and a decent environment, the weather's good, nice architecture, and where we can do activities that we want to do like dancing. But there needs to be something for people to do other than eat and drink.*

*[Respondent D, Foreign tourist, 2022/04/05:1900]*

Equally, district organisers have strong expectations:

*I want to see a robust strong tourism industry, where everybody gets a piece of whatever pie, I've always said to people, you don't get rich. Through tourism, you work your bloody arse off ... Here, they talk about a place where our people are our biggest strength. [Respondent O, Domestic tourist, Limpopo, 2022/04/13:0900]*

Perhaps we can conclude with a quote from a “digital nomad” working in IT (he can work “anywhere”), who denied any desire to be seen as, or to act as, a tourist:

*Well, I travel. And I guess I have engaged in some activity that would be considered touristic, but I don't like being influenced. And it's not something I've done. So even if I travel, I don't actually try to do the*

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*tourist, you know, destinations, but instead just get away from the masses.  
[Respondent V, Business traveller, Cape Town, 2022/04/19]*

One has to wonder, therefore, why he chose to work in Cape Town!

For most tourists, the quality of the experience has a great deal to do with “getting close” to local people and local cultures. In one project the champion saw this as a personal and a project objective:

And I just I was in seventh heaven. That's exactly the kind of a place where I love to be. Actually I like to be on the ground. I like to taste the traditional food, I like to wear the traditional clothes. And so that is one of the things we're trying to bring in. To get people to understand that being part of tourism means you're part of the value chain ... Come and taste Susie's kitchen, go and stay at bushcamp or go and have a homestay experience (which is one of the experiences that sadly, they launched on the 27th of February 2020. So they've actually had no guests yet .. ).  
[Respondent O, Domestic tourist, Limpopo, 2022/04/13:0900]

Covid has been a barrier to getting started, but the enthusiasm is still there. The principles of Ubuntu come to mind as a distinguishing feature of living, travelling and eating in South Africa.

*And then there's having a conversation when people are really enjoying themselves. And we're meeting [people in] the galleries. So the gallery, people I've never met before talking ... and you can tell the clients really engaging with a young black female curator, or it could be a white curated director in a wheelchair. And, like getting a free catalog. And it's because it's my passion as well, visual arts and this German couple we've never met before, we all had the most amazing afternoon, and it was booked the day before. And they're probably gonna buy some artwork. Yeah, so everyone wins.  
[Respondent L, Provider, Cape Town, 2022/04/05:1630]*

Success cannot only be measured in terms of “service excellence”, it seems.

## Annex 5 – Map and Calendar

### Map of existing food festivals in South Africa

By inspection of appropriate Internet sources, the map illustrated below locates 128 gastronomic experiences, and 16 food festivals – *depending on the features of your PDF reader, click on the image to open a manipulable version of the map:*



Or click this link for “direct” access:

<https://www.google.com/maps/d/u/0/edit?mid=1LH9oUnxt1RXZTZrkSlynHWRBZMsSarpA&usp=sharing>

#### Method:

**“Eateries”:** The identified places with food experiences were derived from Airbnb and from Google maps. The lists are not exhaustive and it would be reasonable to allow additions to be made. Airbnb entries were selected from Airbnb Experiences, searching with “food experiences” – some entries were ignored because the primary focus was clearly on something else, for example horse riding; note that Airbnb entries are driven by the service providers, not by other entities. Google Maps entries were selected by focusing on all areas of the country one at a time, and again searching for “food experiences”; note that Google Maps entries are driven as much by the travelling public (offering reviews and adding their favourite places) as by the service providers. Other entries were derived from what is generally regarded as the authoritative source on eating places, “Eat Out” magazine, searching for “Africa” in the establishment’s name; however, those magazine listings do not categorise the genre of establishments and therefore were of limited use; further, the entries are driven by commercial considerations.

**“Festivals”:** There is considerable uncertainty about festivals following Covid-19, however ticketing agencies such as WebTicket and Quicket do list some festivals, that are listed here.

**Caution:** *Any use of these listings needs to acknowledge that the food industry is volatile, and both restaurants and festivals are subject to uncertainties of availability and actual service offerings.*

## Calendar of existing food festivals in South Africa

A calendar has been prepared showing the 16 known food festivals – depending on the features of your PDF reader, click on the image to open a manipulable version of the calendar (choose “Agenda” to see the “list” view):



Or click this link for “direct” access:

<https://calendar.google.com/calendar/embed?src=5jdtik7l67rupehdno77392508%40group.calendar.google.com&ctz=Africa%2FJohannesburg>

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## Annex 6 – Respondents

### Process

Interviews were held between 19 March and 14 April 2022. All except three were held using Zoom, but all were recorded to MP3 files and transcribed with Otter. The automatic transcription was essentially successful, but inevitably there were issues of interpretation and redundancy that required light ‘manual’ editing.

- 39 invitations were issued.
- There were two refusals, eight did not respond (despite reminders), five were only available too late for the deadlines. One (with an expert background) agreed to stand as a critical reader of the final draft report, should that be scheduled.
- Hence there are **23 completed interviews** to work with; four included two participants, so that the data is derived from the views of **27 people**.

The approach to the interview was not “structured”, other than to ensure that the conversation was predicated on *gastronomy tourism* as a post-Covid opportunity, and *economic development*. Beyond that, respondents were free to direct the conversation as they wished.

Respondents were provided with background information in the invitation email. Short notes on the respondents’ backgrounds are provided below.

### Respondents

- **Respondent A:** Elderly permanent resident living in the Western Cape, a well-travelled and enthusiastic tourist.
- **Respondent B:** Retired member of the SA international diplomatic service, now managing a tourist office in the Western Cape.
- **Respondents C:** Retired couple from the UK, with a history of owning property in SA and regular extended visits to the country.
- **Respondents D:** Retired couple from Ottawa (Canada), with diplomatic experience in Africa a five-year history of visiting the Western Cape for 90-day (maximum tourist visa) visits.
- **Respondent E:** Retired director of a well-known hotel school in SA, well-travelled and still periodically touring in SA and elsewhere.
- **Respondent F:** Champion of a trans-province eco-project, guiding tourism development in the region.
- **Respondents G:** Semi-retired well-travelled professional couple from the Western Cape, with a special interest in game parks.
- **Respondent H:** Champion of rural development across South Africa, including rural tourism.
- **Respondents I:** Well-travelled professionals from Ottawa (Canada), one with only limited experience of touring in SA, the other in military service.
- **Respondent J:** Experienced tourist guide in the Western Cape, based in Cape Town.
- **Respondent K:** Well-travelled local government employee from the UK, with a history of regular annual visits to SA.
- **Respondent L:** Experienced tourist guide in the Western Cape, with a special interest in cultural tourism.
- **Respondent M:** Experienced and well-travelled travel agent in the Western Cape, specialising in inbound tourism.
- **Respondent N:** Long-time owner and operator of a rural retreat in the Western Cape.
- **Respondent O:** Champion of an established one-town tourism initiative in Limpopo.
- **Respondent P:** Manager of a five-star boutique hotel in Cape Town.



- **Respondent Q:** Well-travelled professional from Cincinnati (USA) with limited experience of travelling in SA.
- **Respondent R:** Established inbound tourism agent in Rwanda, with experience of living in the Western Cape.
- **Respondent S:** Director of specialist gastronomy tours agency in Cape Town, already reaching out to entrepreneurial individuals starting up.
- **Respondent T:** Chair of active tourism committee in a specific region of the Western Cape, originally from the USA and active in property management.
- **Respondent U:** Retired school principal from Cape Town, limited travel experience but engaged in hosting inbound tourists.
- **Respondent V:** Travelling “digital nomad” from Europe, based in Cape Town for four months.
- **Respondent W:** Established cookery “experience” provider.

## Annex 7 – Diagnosis report from the data analysis tool

This report from the analyser is included as a matter of record. It indicates the volume of data that has been processed, and the extent of the basic results, but it is important to remember that the process is *subjective* and the tool is just a means to achieve a result of a subjective process in an organised, structured way.

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Project: 'Cultural tourism'
Diagnosis: 2022/04/25 - 12:36:47

MSCOMCTL.OCX is registered

Originators has 25 Record(s)

Capturers has 1 Record(s)

Sources has 29 Record(s)

Chunks has 425 Record(s)
Chunk with ID >494< and starting 'Okay. Understood. Thank you very, very m ...' has no codes yet
Chunk with ID >518< and starting 'Might consolidation be useful? That's a ...' has no codes yet
Chunk with ID >526< and starting 'I have a principle, in designing systems ...' has no codes yet
Chunk with ID >530< and starting 'That's right. And people don't want to ...' has no codes yet
Chunk with ID >531< and starting 'Culinary tourism (CT) is a term synonymy ...' has no codes yet
Chunk with ID >394< and starting ' have you ever been involved with touris ...' has no codes yet
Chunk with ID >444< and starting 'We were in Chile, in South America. And ...' has no codes yet
Chunk with ID >567< and starting ' And then a lovely, unexpected one was o ...' has no codes yet
Chunk with ID >574< and starting 'Are you a "case study"? As I hinted, are ...' has no codes yet

Denotata has 2042 Record(s)

Categories has 63 Record(s)
Category with ID >48< and named 'Impact' has no coding yet

Exclusions has 128 Record(s)

Structure has 64 Record(s)

Words has 32055 Record(s)

Housekeeping has 1 Record(s)
The threshold for pairs reporting is >1<
The maximum number of levels for analysing the tree structure is >2<

There are: >1105< words per source, on average
There are: >75< words per chunk, on average
There are: >4< codings per chunk, on average
There are: >32< codings per category, on average

[End of diagnosis]
```