

POLICY REVIEW UPDATE

**PRESENTATION TO SABOA
25 MAY 2017**

DEPARTMENT OF TOURISM



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

Introduction

- The National Tourism Sector Strategy (NTSS) approved by Cabinet in 2011 remains the guiding document for tourism economic growth and job creation.
- Transport is a key enabler of Tourism;
- Tourism also drives transport Demand;
- Key considerations for the review process:
 - Ensure relevance of the strategy in a dynamic and rapidly changing global environment
 - Alignment to the National Policy context notably the National Development Plan (NDP, 2012) and Tourism Act 3 of 2014



Review Process led by Panel of Experts

Environmental Scan

Systematic exploration of the external environment –
Status Quo Report

Drafting/Reviewing of the Strategy & Stakeholder Consultation

Translate the emerging issues to finalise the key areas of focus and Strategy Framework

Gazetting for public comments, consolidation of inputs & submission for approval

Facilitate Gazetting process, consolidate, analyse and incorporate inputs to finalise the updated draft strategy

Awareness Creation

Awareness Creation on the new Strategy



International Trends

- *Consistent and increasing growth globally in international tourist numbers*
- *Shift in tourism demographics: Emerging source markets growing at double digit levels, an increase in older tourists, under 35's and family groups travelling*
- *Pervasive mobile digital technology resulting in an expectation of permanent quality connectivity availability, changed patterns in information seeking and changes in buying behaviour. Agility is key.*
- *Personal safety and security*
- *Increased accessibility and increased ease of access*
- *Increasing interest in “green” “sustainable”, “responsible” and “ethical” tourism*



Vision, Mission & Values

NTSS 2011

Revised NTSS, 2016

VISION

To be a top 20 destination by 2020

A rapidly and inclusively growing tourism economy that leverages South Africa's competitive advantages in nature, culture, and heritage, supported by product and service excellence, and innovation.

MISSION

To grow a sustainable tourism economy in South Africa with domestic, regional and international components, based on innovation, service excellence, meaningful participation and partnerships

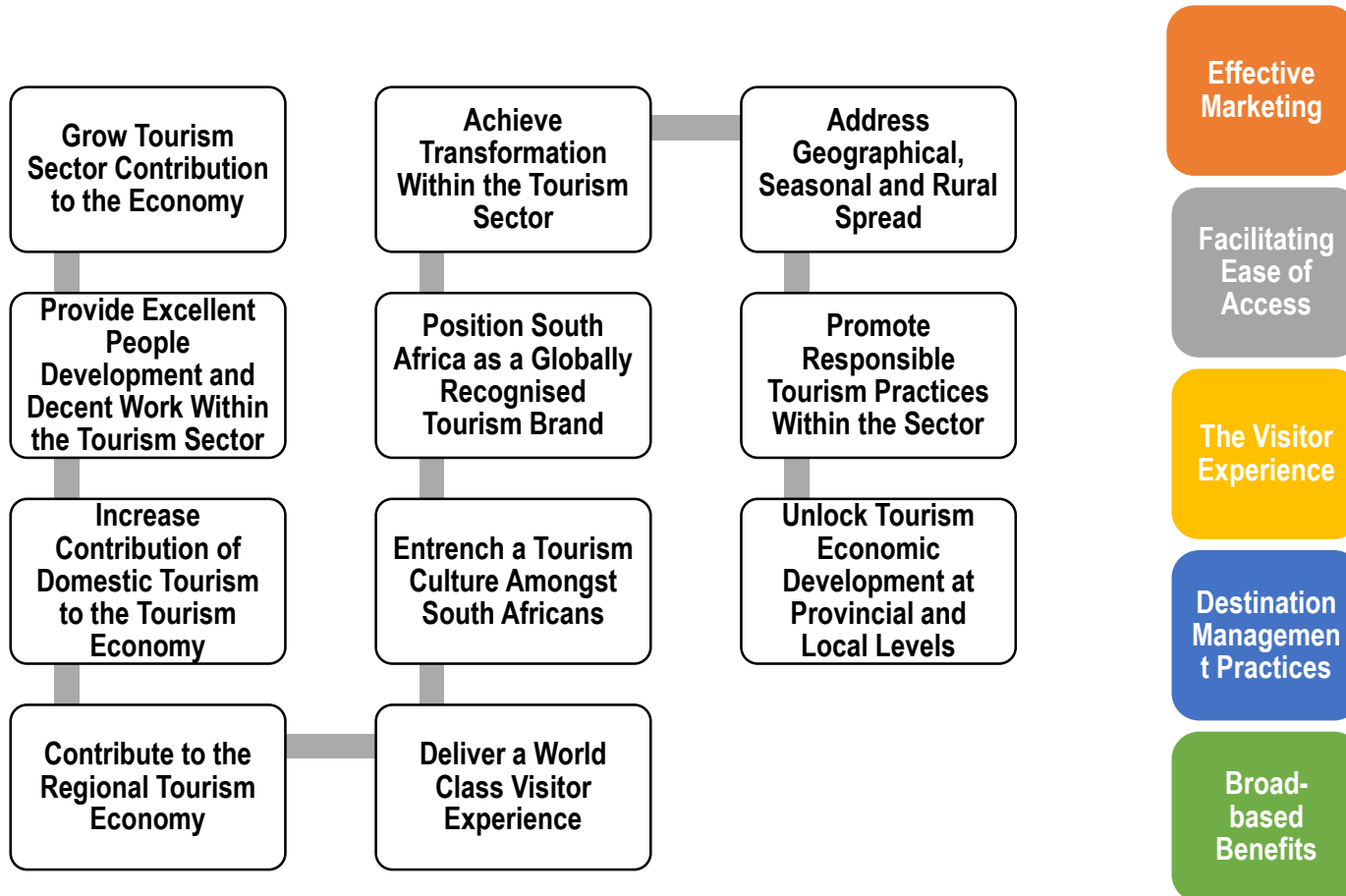
To increase the direct contribution of tourism to the economy through collaborative planning, and the implementation of agreed priority actions

VALUES

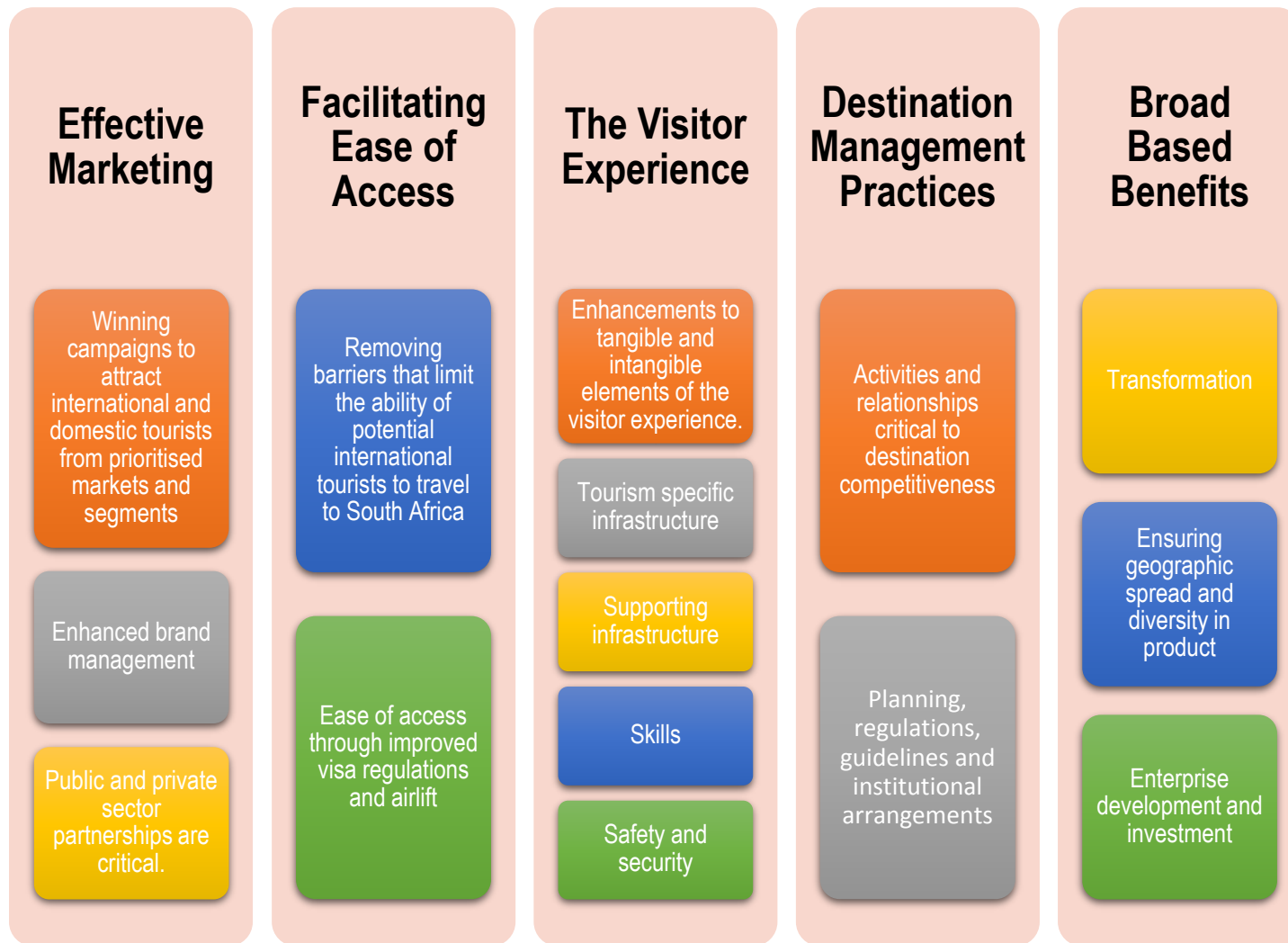
Trust, Accountability, Respect for our culture and heritage, Responsible tourism, Transparency and integrity, Service excellence, Upholding the values of our constitution, Commitment to transformation, Flexibility and adapting to change as well as ***Collaboration and cooperation between all key stakeholders, in particular in the areas of destination marketing; and a commitment to accurate, reliable, useful, timely data and market intelligence to guide tourism planning and monitoring.***



From 11 Strategic Objectives to 5 Strategic Pillars



Unpacking 5 the Strategic Pillars

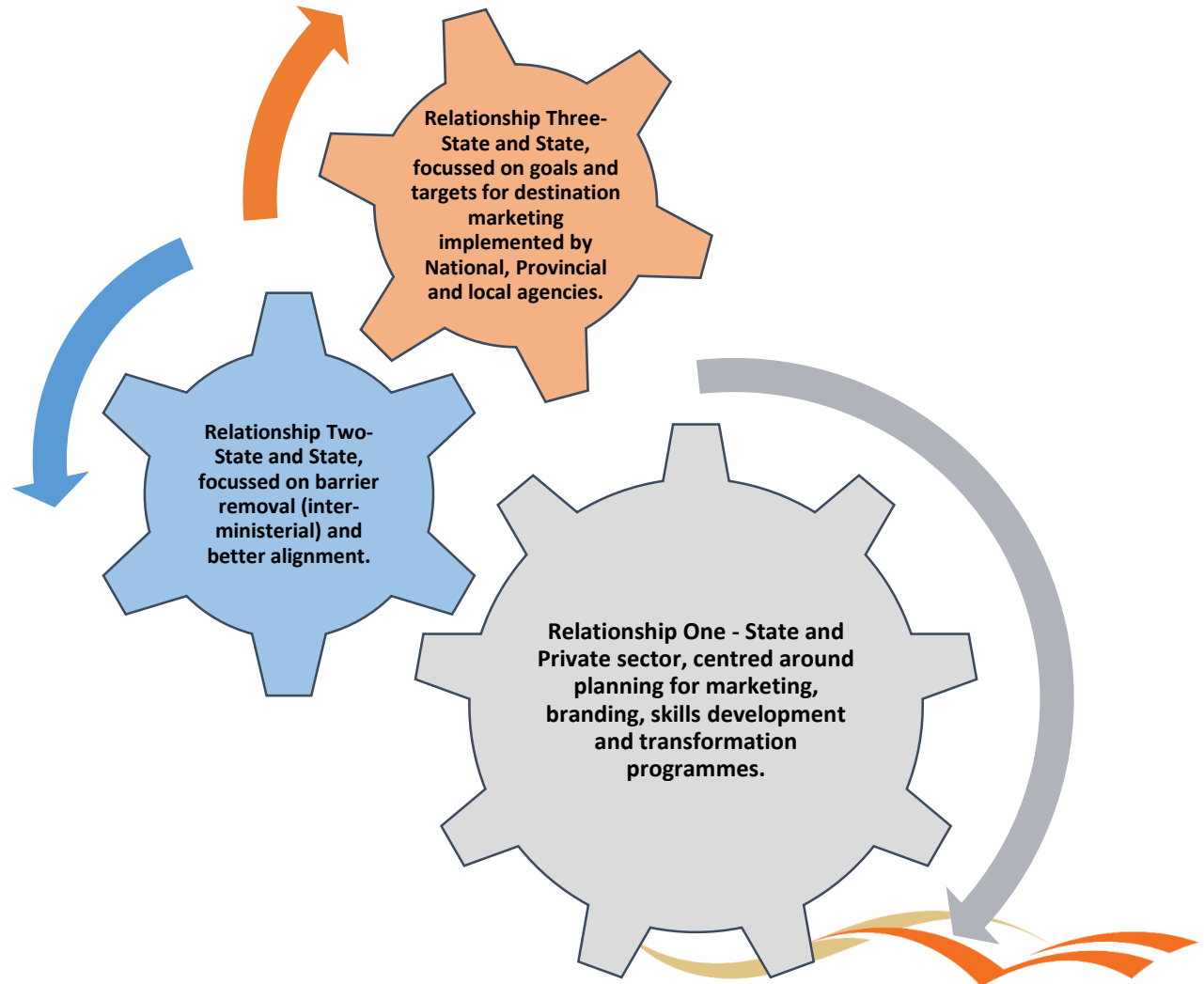


Achievements & Revised NTSS Targets

Indicators/Measure of Performance	Current NTSS 2009 Baseline	2015 Performance	2026 Revised NTSS Targets(Est.)
Increase direct contribution to National Gross Domestic Product	R71,4 bn	R118 bn	R302 bn
Increase total(direct and indirect) contribution to National Gross Domestic Product	R189,4 bn	R375.502 bn	R941.222 bn
Increase the number of direct jobs supported by the sector	389 100	702 824	1 million
Increase the number of total (direct and indirect) jobs supported by the sector	919 800	1 551 200	2 260 380
Increase tourism export earnings	-	R115 billion	R359 bn
Increase in capital investment	R82.4 bn	R64 billion	R148.681 bn

Other indicators include growth in the number of overseas tourist arrivals regional (African) tourist arrivals, and domestic tourist trips and their direct spend in all the three categories.

Tourism is about Building Relationships



Institutional Arrangements, Monitoring, Evaluation and Reporting

Institutional arrangement and structures:

- The revised strategy will provide for the institutional arrangements and structures to ensure coordinated efforts in the implementation of the revised NTSS.
- The strategy will further present structures across the three spheres of government, with responsibilities at each level

Monitoring Evaluation and Reporting:

- The Department will lead, support activities, monitor and evaluate the implementation of the revised strategy through a National Tourism Stakeholders Forum, which will also serve as the NTSS Delivery forum



Current Status

- DOT amongst the key stakeholders consulted;
- Transport a key component of the destination development process; which is a key focus area commencing in this financial year.
- Draft NTSS gazetted for public comment on the 5th May 2017
- 60 day comment process
- Expert Panel will then recommend adoption of the Strategy to the Minister; and
- Final revised Draft will be presented for approval by Cabinet.



Thank You!

