

EASTERN CAPE



Province of the
EASTERN CAPE
ECONOMIC DEVELOPMENT,
ENVIRONMENTAL AFFAIRS AND TOURISM

TOURISM MASTER PLAN

2022–2032



Collaboration

Service excellence

Unique experiences

Inclusive development

Sustainable growth



Table of Content

Section 1: INTRODUCTION	1
1.1 Project Background	1
1.1.1 Project Scope	1
1.1.2 Stakeholder Engagements	1
1.2 Report Structure	2
Section 2: POLICY REVIEW SUMMARY	3
2.1 Tourism Legislation	3
2.1.1 National Level.....	3
2.1.2 Provincial Level	5
2.1.3 District/Local Level.....	6
2.1.4 Conclusion.....	7
2.2 Institutional Environment	8
2.2.1 National Level.....	8
2.2.2 Provincial Level	9
2.2.3 District and Local Level	10
Section 3: STATUS QUO OVERVIEW.....	12
3.1 Provincial Overview	12
3.2 Tourism Performance	13
3.2.1 International Tourism Demand.....	14
3.2.2 Domestic Visitor Tourism Demand	15
3.3 EC Tourism Value Chain	17
3.4 SWOT Analysis.....	19
3.5 Global Tourism Planning Trends	20
3.5.1 Experiential Travel	20
3.5.2 Information Distribution	20
3.5.3 Culinary Events.....	22
3.5.4 Pedestrian Culture	22
3.5.5 Sustainable and Responsible Tourism	22
3.5.6 Supporting Local Tourism	22
Section 4: STRATEGIC FRAMEWORK.....	23
4.1 Appraisal of Previous Strategy	23
4.1.1 Strategic Approach and Implementation.....	23

4.1.2	Strategic Guidance	23
4.2	Master Plan 2022-2033 Vision	24
4.3	Purpose of the Master Plan	24
4.4	Strategic Objectives	24
4.5	Strategic Direction	25
4.5.1	Securing the foundation	25
4.5.2	Value Chain Optimisation	26
4.5.3	Visitor Satisfaction	27
Section 5: PRIORITY DEVELOPMENT AREAS		28
5.1	Destination Accessibility	28
5.1.1	Introduction	28
5.1.2	Main Challenges.....	28
5.1.3	Key Considerations.....	29
5.1.4	Recommendations for Destination Accessibility	29
5.2	Destination Management	30
5.2.1	Introduction	30
5.2.2	Main Challenges.....	30
5.2.3	Key Considerations.....	30
5.2.4	Recommendations for Destination Development	33
5.3	Product Development.....	33
5.3.1	Introduction	33
5.3.2	Main Challenges.....	34
5.3.3	Key Considerations.....	34
5.3.4	Product Diversification.....	40
5.3.5	Recommendations for Product Development	46
5.4	Visitor Experience	47
5.4.1	Introduction	47
5.4.2	Main Challenges.....	47
5.4.3	Key Considerations.....	47
5.4.4	Recommendations for Visitor Satisfaction	48
5.5	Transformation	49
5.5.1	Introduction	49
5.5.2	Tourism Transformation in the Eastern Cape (Accommodation Industry).....	50
5.5.3	Main Challenges.....	51
5.5.4	Key Considerations.....	51
5.5.5	Recommendations for Sector Transformation,	56

5.6	Marketing.....	56
5.6.1	Introduction	56
5.6.2	Main Challenges.....	57
5.6.3	Key Considerations.....	57
5.6.4	Recommendations for Marketing.....	57
Section 6:	INSTITUTIONAL FRAMEWORK.....	59
6.1	Introduction	59
6.2	Main Challenges.....	59
6.2.1	Coordination Issues.....	59
6.2.2	Tourism Budgeting Issues	59
6.2.3	Tourism Implementation Issues.....	60
6.3	Key Considerations.....	60
6.4	Recommendations	61
Section 7:	IMPLEMENTATION PLAN.....	62
7.1	Priority (Timeframe) Level	62
7.2	Key Consideration for Implementation	62
7.3	Implementation Plan	63
7.4	Destination Management	66
7.5	Marketing.....	73
7.6	Product Development.....	79
7.7	Transformation	87
Section 8:	Monitoring and Evaluation	90
8.1	Introduction	90
8.2	Monitoring and Evaluation Recommendations	90
Section 9:	Conclusion.....	91
9.1	Key Considerations for Sector Growth.....	91
9.1.1	Tourism Prioritisation.....	91
9.1.2	Institutional Organisation	91
9.1.3	Creating an Enabling Environment	91

List of Figures

Figure 1: Recommended Institutional Structure: National Level	8
Figure 2: Recommended Institutional Structure: Provincial Level	9

Figure 3: Recommended Institutional Structure: District and Local Level	10
Figure 4: Eastern Cape Tourism Demand Performance in 2020.....	13
Figure 5: Age Groups and Repeat Visits.....	14
Figure 6: International Repeat Visits.....	14
Figure 7: Travel Companion Trends	15
Figure 8: Number of Visitors to Main Attractions in the Eastern Cape	15
Figure 9: Eastern Cape Domestic Tourism Expenditure 2020.....	16
Figure 10: Purpose of Visit for Domestic Tourists in 2020.....	16
Figure 11: Domestic Seasonality	17
Figure 12: Eastern Cape Tourism Value Chain	18
Figure 13: Eastern Cape Tourism Sector SWOT Analysis	19
Figure 14: Strategic Direction	25
Figure 15: Foundational Components of the Tourism Sector.....	26
Figure 16: Tourism Product Categories.....	48
Figure 17: The Geography of Black-Owned Accommodation Services in Eastern Cape.....	50
Figure 18: The Geography of Transformation in Accommodation Services in Eastern Cape	51

List of Tables

Table 1: Master Plan Report Structure	2
Table 2: National Tourism Policies.....	3
Table 3: Provincial Tourism Policies.....	5
Table 4: District and Local Level Policies.....	6
Table 5: National Tourism Support Structures	52
Table 6: Implementation Priority Description Table.....	62
Table 7: Destination Accessibility	63
Table 8: Destination Management	66
Table 9: Marketing	73
Table 10: Product Development	79
Table 11: Transformation.....	87



Abbreviations/Acronyms

CATHSSETA	Culture, Art, Tourism, Hospitality, and Sport Sector Education and Training Authority
CMT	Coastal and Marine Tourism
DBSA	Development Bank of South Africa
DEDEAT	Eastern Cape Department of Economic Development, Environmental Affairs and Tourism
DM	District Municipality
DSRAC	Department of Sport, Recreation, Arts and Culture
ECDC	Eastern Cape Development Corporation
ECPTA	Eastern Cape Parks and Tourism Association
ECTTF	Eastern Cape Tourism Transformation Forum
ELICC	East London International Convention Centre
ICT	Information Communication Technology
IP	Implementation Plan
LM	Local Municipality
LTO	Local Tourism Organisation
NDP	National Development Plan
NFTGA	National Federation of Tourist Guides Association
NGO	Non-Governmental Organisation
NTSS	National Tourism Sector Strategy
SAT	South African Tourism
SAPS	South African Police Service
SAMSA	South African Maritime Safety Authority
SATSA	Southern Africa Tourism Services Association
SMME	Small, Medium and Micro Enterprises
SWOT	Strengths, Weaknesses, Opportunities, Threats
TMP	Tourism Master Plan
TSRP	Tourism Sector Recovery Plan
VFR	Visiting Friends and Relatives
UGC	User Generated Content
WCHA	Wild Coast Holiday Association

SECTION 1: INTRODUCTION

1.1 Project Background

The Eastern Cape (EC) offers tourists a rich diversity of natural and cultural landscapes, attractions, and activities – attributes that position the province as a strong competitor within the national tourism sphere. However, opportunities exist to improve the performance of its tourism sector; these should be embraced by role players to contribute to economic growth and job creation in the province. To develop these opportunities and implement growth initiatives, an inclusive approach is needed that combines effective management and stakeholder collaborations.

Considering the immense impact that the global Covid-19 pandemic and the resultant lockdown regulations continue to have on the tourism sector, the priority for tourism is to resume operations and work towards pre-COVID normality. This considered, the announcement by the South African Department of Health that COVID restrictions would be dropped entirely – for both domestic and international travel – came as a lifeline for tourism in the country¹. It is in this context that the Eastern Cape Department of Economic Development, Environmental Affairs and Tourism (DEDEAT) initiated the development of an updated strategy for the sector: the Tourism Master Plan 2022-2033 (TMP). This encompasses both a recovery strategy and recommendations for achieving inclusive and sustainable growth of the sector over the next 10 years. Furthermore, the TMP is intended to align with the Eastern Cape Vision 2030 Provincial Development Plan, the National Tourism Sector Strategy (NTSS), the National Development Plan (NDP), and the Tourism Sector Recovery Plan (TSRP).

The goals of the TMP are to stimulate economic growth, get local communities to participate in tourism, and ensure that benefits are spread to all who are involved. In doing so, it is possible to build and foster a sustainable tourism sector.

1.1.1 Project Scope

The project scope outlined the following activities to be undertaken for the successful development of the TMP:

- analysis of the existing tourism research information and statistics
- analysis of tourism-related legislation and policies
- identifying the current gaps in supporting tourism development and promotion
- facilitate consultative sessions within the province
- developing an effective destination management framework (Tourism Master Plan)
- developing a consolidated implementation (action) plan.

1.1.2 Stakeholder Engagements

The success of the TMP is embedded in the effective coordination and collaboration of all relevant tourism stakeholders in the Eastern Cape. The collective usage of resources in the implementation of programmes and projects will yield the most desirable outcome in terms of infrastructure optimisation and socio-economic impacts. In the process of formulating the TMP, individual and group interviews were conducted virtually, and two regional engagement sessions were conducted with district and

¹ Travel Daily Media June 2022. South Africa drops Covid restriction and lifts tourism industry.

local tourism stakeholders across the various regions. A provincial stakeholder engagement session was held that was attended by stakeholders from the local, regional, provincial and national levels. Stakeholder engagements involved representatives from the public as well as the private sector.

Engagements were directed at assessing the current state of tourism in the province and reviewing policies that inform tourism development and management. The various meetings focused on identifying the strengths and weaknesses of the tourism sector as well as the challenges and opportunities of marketing, product development, infrastructure, accessibility, destination management, transformation, and institutional arrangements. Recommendations and input received from stakeholders form the foundation of the TMP as described in this report.

1.2 Report Structure

The table below briefly outlines the different sections of this report.

Table 1: Master Plan Report Structure

Section 1: Introduction	This section provides the project background; it also details the scope of work and the stakeholder consultations that were conducted for the project.
Section 2: Policy Review Summary	This section provides an overview of all the national, provincial, and regional legislation, policies, and strategies that guide tourism planning and development in the Eastern Cape.
Section 3: Tourism Status Quo Overview	This section looks at the province's tourism performance during the pandemic. It further provides an analysis of strengths, weaknesses, opportunities, and threats (SWOT) within the tourism sector and addresses current tourism trends.
Section 4: Strategic Framework	This section provides a summary appraisal of the previous Master Plan, the Eastern Cape Tourism Master Plan (2009-2014), and introduces the various development areas where strategic intervention is needed. It also unpacks the key challenges and components to consider for each area.
Section 5: Priority Development Areas	This section unpacks the six priority areas for tourism development and outlines the main challenges and recommendations for each.
Section 6: Institutional Framework	This section addresses the institutional landscape of tourism and its effectiveness and makes recommendations on areas that require improvement.
Section 7: Way Forward	The final section provides recommendations on the way forward and also a brief description of the development of the action plan.

SECTION 2: POLICY REVIEW SUMMARY

2.1 Tourism Legislation

Since tourism is a highly significant economic sector (globally and locally) that provides substantial opportunities for sustainable and inclusive economic growth, it must be represented and addressed in sector-specific legislation. The subsection below outlines some of the key policies established at the national, provincial and local levels.

2.1.1 National Level

The following policies have an impact on tourism development at a national level:

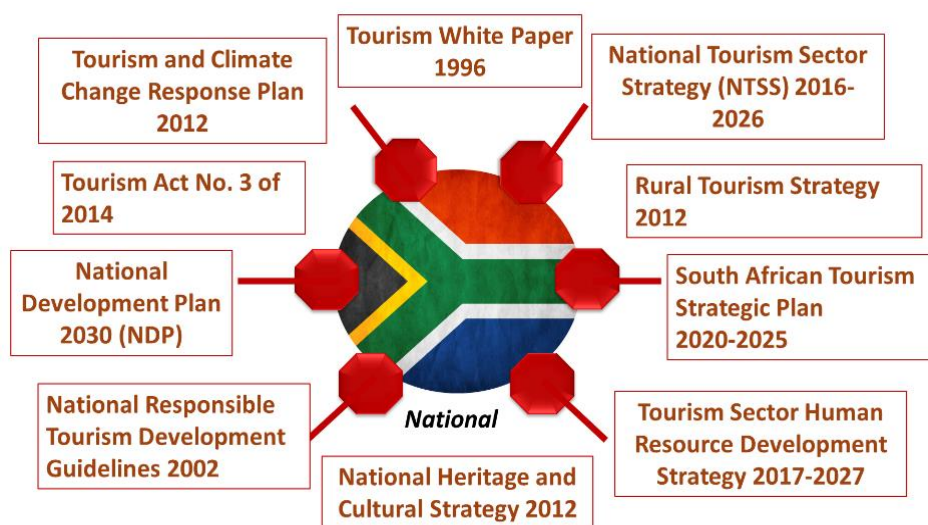


Table 2: National Tourism Policies

Policy	Implications for Eastern Cape Tourism
White Paper, 1996: 'The Development and Promotion of Tourism in South Africa'	The White Paper provides clarity on the roles and responsibilities at all government levels to ensure that tourism operations are conducted effectively and that all parties are aware of what is expected from them within the tourism sector. It also sets the stage for responsible tourism as the key guiding principle for tourism development in the province.
National Tourism Sector Strategy 2016-2026	The strategy lists five pillars that define a set of supply- and demand-side interventions to be pursued for further development of the tourism sector. It acknowledges collaboration as a critical component of all programmes to be undertaken and highlights the competitive and complex nature of the sector.

Policy	Implications for Eastern Cape Tourism
Tourism Act No. 3 of 2014	The Tourism Act outlines the roles and responsibilities of the different spheres of government to avoid confusion in terms of what is expected from tourism stakeholders. Each level of government is responsible for a certain set of actions regarding tourism development. All levels are interconnected and the actions (or lack thereof) of one level (national, provincial, local) have an impact on the efficiency of the others. All stakeholders must work together toward achieving tourism growth and development goals.
National Development Plan 2030	The NDP focuses on growing an inclusive economy, building capabilities, enhancing the capacity of the state and promoting leadership and partnerships throughout society – this to accelerate transformation and reduce poverty and inequality. Progress on these fronts will create a platform for entrepreneurs to access markets and establish themselves as competitive sector players.
Rural Tourism Strategy 2012	The predominant spatial fabric of the Eastern Cape is rural, ranging from commercial agriculture to underdeveloped areas that constituted the former homelands. The rural areas of the province also encompass several private and publicly managed nature reserves. Thus, the objectives of the Rural Tourism Strategy are of particular importance to developing tourism in this province. The projects of the strategy focus on rural development along with alternative tourism development to stimulate an enabling environment for job creation in local communities.
National Responsible Tourism Development Guidelines 2002	Sustainable tourism in the Eastern Cape can be achieved by protecting the environment, natural resources, and wildlife. Sustainability also includes providing socio-economic benefits for communities who live in tourist destinations, conserving cultural heritage and creating authentic tourist experiences.
South African Tourism Strategic Plan 2020-2025	Amidst the COVID-19 pandemic, it is imperative for the province to keep up with tourism trends, not only to stay relevant but also to attract a larger tourism market (through catering to niche markets). Also, tourism can positively contribute to transformation through facilitating the emergence of effective small, medium, and micro enterprises (SMMEs) and enabling skills development; this will assist in reducing poverty and improving the livelihoods of local communities.
National Heritage and Cultural Strategy 2012	The heritage and cultural tourism niche has achieved prominence on a global scale as more tourists seek an interactive cultural experience when travelling. South Africa is a cultural hot spot and for this reason, it is vital to uplift this element within the Eastern Cape's tourism landscape.
National Tourism Service Excellence Strategy 2012	All tourism providers in the province should strive for service excellence, not only delivering on customer expectations but also exceeding those expectations. Satisfied consumers ultimately lead to repeat visits or recommendations that translate into more visitors to the province.

2.1.2 Provincial Level

The following policies have an impact on tourism development at a provincial level:



Table 3: Provincial Tourism Policies

Policy	Implications for Eastern Cape Tourism
Eastern Cape Oceans Economy Master Plan 2020	The ocean economy is potentially one of the most diverse economic sectors, with real potential to generate extensive, meaningful development and deliver benefits at scale. To achieve this, a focused and multi-tiered approach is required to harness relevant role players from both the public and private sectors and to produce a road map and strategy that have universal acceptance.
Eastern Cape Coastal and Marine Strategy 2016-2020	This strategy provides guidelines for attracting investment in the ocean economy and preparing for the environmental impact assessment process. It includes a history of coastal and marine tourism development and surveys the latest trends in coastal property development.
Wild Coast Environmental Management Plan 2014	To achieve tourism growth in the province, an enabling environment should be created in which tourism can flourish. Adequate, safe and clean infrastructure needs to be in place and optimally functioning to ensure a pleasant visitor experience (this includes the provision of basic services). Tourism products should strive to be sustainable. This can be achieved through effective planning and the implementation of the relevant risk management and contingency plans.
Eastern Cape Vision 2030 Provincial Development Plan	The plan prioritises a growing, inclusive and equitable economy, one driven by actions aimed at promoting new economic activity, especially in rural areas. It envisages strong support for enterprises and emphasises the need for transformation in tourism.
Eastern Cape Tourism Master Plan (2009-2014)	This is the predecessor to the TMP under development. It provides guidelines for the updated TMP in terms of identifying priority areas for development and challenges that are facing the sector. These components

Policy	Implications for Eastern Cape Tourism
	should be investigated to enhance the performance of the sector and increase the competitiveness of the province.
Strategic Plan for 2020/21 – 2024/25 of the Eastern Cape Parks and Tourism Agency	For effective marketing of the province as a tourist destination, it is necessary to revitalise offerings constantly, including by drawing on a pipeline of market-ready products. Key to these efforts will be the sector's ability to take advantage of heritage and cultural offerings, develop products that blend rural and urban settings and showcase the province's myriad unique landscapes.
Eastern Cape Infrastructure Plan 2030	Within each of the Eastern Cape's regions, there are several large strategic projects in various stages of planning, implementation and completion that will catalyse economic development. The focus should be to accelerate infrastructure provision to help unlock the economic potential that can be provided through tourism development.

2.1.3 District/Local Level

The following policies have an impact on tourism development at a district/local level:

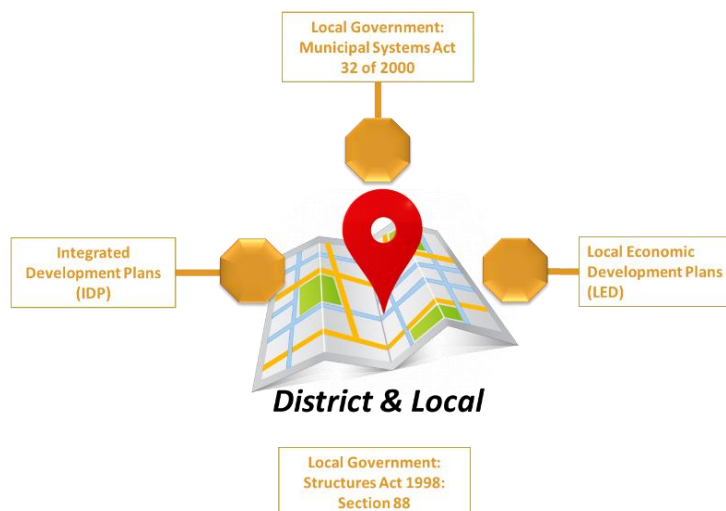


Table 4: District and Local Level Policies

Policy	Implications for Eastern Cape Tourism
Local Government: Municipal Systems Act 32 of 2000	This Act “provides the core principles, mechanisms, and processes that are necessary to enable municipalities to move progressively towards the social and economic upliftment of local communities and ensure universal access to essential services that are affordable to all”.

Policy	Implications for Eastern Cape Tourism
Local Government: Municipal Structures Act 117 of 1998 (Section 88)	This Act “provides for the establishment of municipalities under the requirements relating to categories and types of municipalities and establishes criteria for determining the category of the municipality to be established in a specific area”.
District Development Models	This approach aims to enable coherent, seamless and sustainable service delivery and development with an integrated impact on the quality of life and quality of living spaces at local and municipal levels.
Integrated Development Plans (IDPs)	An IDP assists in finding the best solutions to achieve good long-term development in a municipal area. These plans include tourism planning and development in the form of tourism-related projects identified for the individual metro, district, or local municipality. The different spheres of government are encouraged to work in a coordinated manner to tackle the development needs in a local area.
Local Economic Development Plans (LEDs)	LEDs provide support in the development and review of national policy, strategy, and guidelines on local economic development. They also provide support to provincial and local governments, facilitating the coordination and monitoring of programmes and assisting with capacity-building processes. Tourism can impact positively on local economic development that, in turn, can lead to poverty reduction in destination communities and the province in general.

2.1.4 Conclusion

The policy review indicates that on a **national level**, South Africa has a comprehensive set of tourism-related policies and strategies that give sound structure to – and effectively prioritise – the development of the tourism sector in the country. Guidance is provided in terms of the different responsibilities of role players in the sector and collaboration is identified as a critical component of any activities to be undertaken.

On a **provincial level**, the various departments and agencies in the Eastern Cape acknowledge tourism as a significant sector of the economy. Appropriate focus is also placed on the ocean economy through a provincial coastal and marine tourism strategy that guides in terms of ocean investment and tourism development. Furthermore, environmental management is prioritised in alignment with responsible tourism implementation and related practices. The acceleration of transformation in the sector as well as the significance of establishing an inclusive economy is reflected in tourism policies.

On a **district/local level**, government Acts provide the requirements, mechanisms, and processes to enable municipalities to function effectively and progressively. There is a comprehensive approach to increasing economic development within the province as set out in the municipalities’ IDPs and LED strategies. These documents support local tourism development initiatives and indicate how tourism can contribute to local economic development within the individual regions.

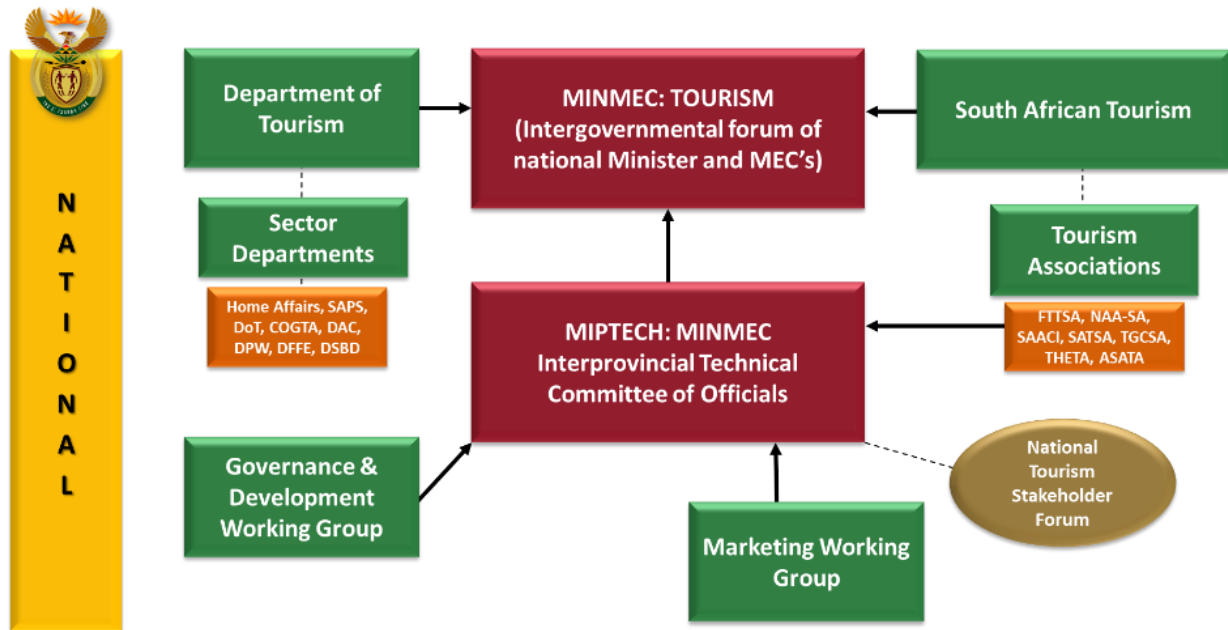
Ultimately, tourism is recognised in local, district, provincial and national planning documents as an important sector and one with significant potential to transform the skills, employment, income generation, and community beneficiation landscapes.

2.2 Institutional Environment

The institutional responsibilities of the various levels of government are briefly discussed below in terms of the extent to which these align with the institutional structures recommended in the NTSS.

2.2.1 National Level

Figure 1: Recommended Institutional Structure: National Level



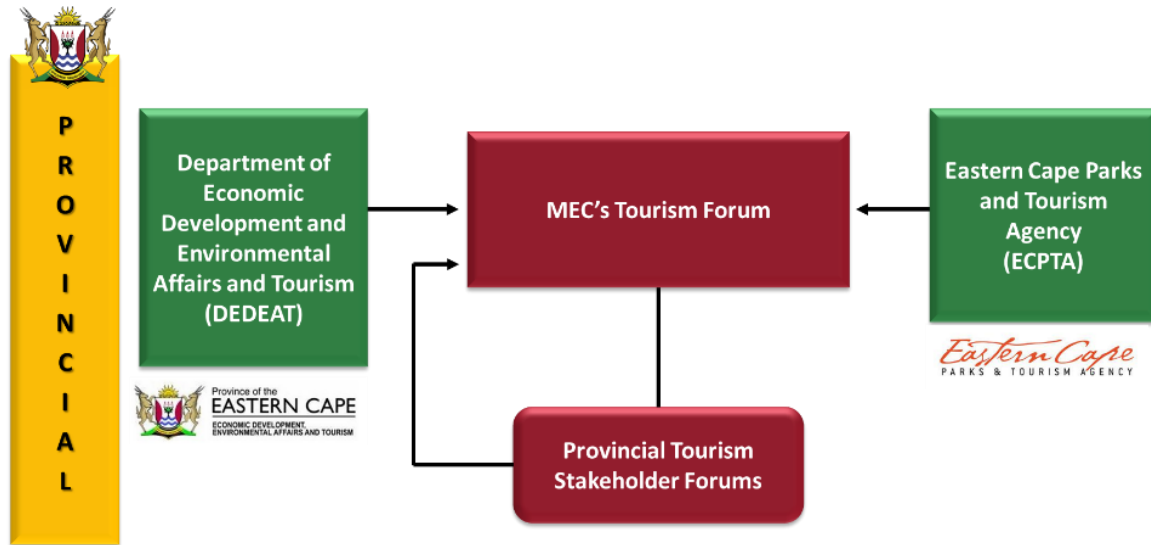
On the national level, key structures include the Department of Tourism (NDT), which is responsible for national tourism policy, regulation, and development. South African Tourism is responsible for marketing the country as a tourism destination and providing strategic leadership to the South Africa National Convention Bureau. The interprovincial tourism technical committee (MIPTECH) coordinates provincial and national affairs in preparation for the MINMEC: a standing forum for the national Minister of Tourism and the Members of Executive Councils (MECs) for Tourism. MINMEC discusses and agrees on national tourism policy matters.

To ensure coordination and collaboration in tourism governance, planning, and marketing, various intergovernmental Tourism Working Groups have been established. The governance and planning issues are coordinated by the NDT, while South African Tourism coordinates marketing issues. The working groups make recommendations on relevant matters to MIPTECH.

The National Tourism Stakeholder Forum, coordinated by the NDT, addresses strategic issues such as the implementation of the NTSS. To ensure that provincial priorities receive attention at the national level, MECs bring these matters to MINMEC for consideration.

2.2.2 Provincial Level

Figure 2: Recommended Institutional Structure: Provincial Level



On the provincial level, DEDEAT is mandated to accelerate economic growth, promote sustainable environmental management, reduce economic inequalities, diversify tourism development and facilitate investment promotion. Its mission is to promote and facilitate equitable, sustainable economic development and environmental management through effective programmes, partnerships, and people-centred service standards.

The mission of the provincial tourism marketing authority, the Eastern Cape Parks and Tourism Agency (ECPTA), is to lead responsible conservation and tourism for the benefit of current and future generations. The ECPTA is responsible for the marketing, promotion, and development of tourism in the province and the transformation of the tourism sector.

The Eastern Cape Development Corporation (ECDC) is a dynamic economic development agency that works with provincial and national ministries, municipalities, chambers, private businesses, communities, and other development agencies to implement the economic development policies of the Eastern Cape provincial government. The priorities of ECDC are to facilitate and support private sector development in the province.

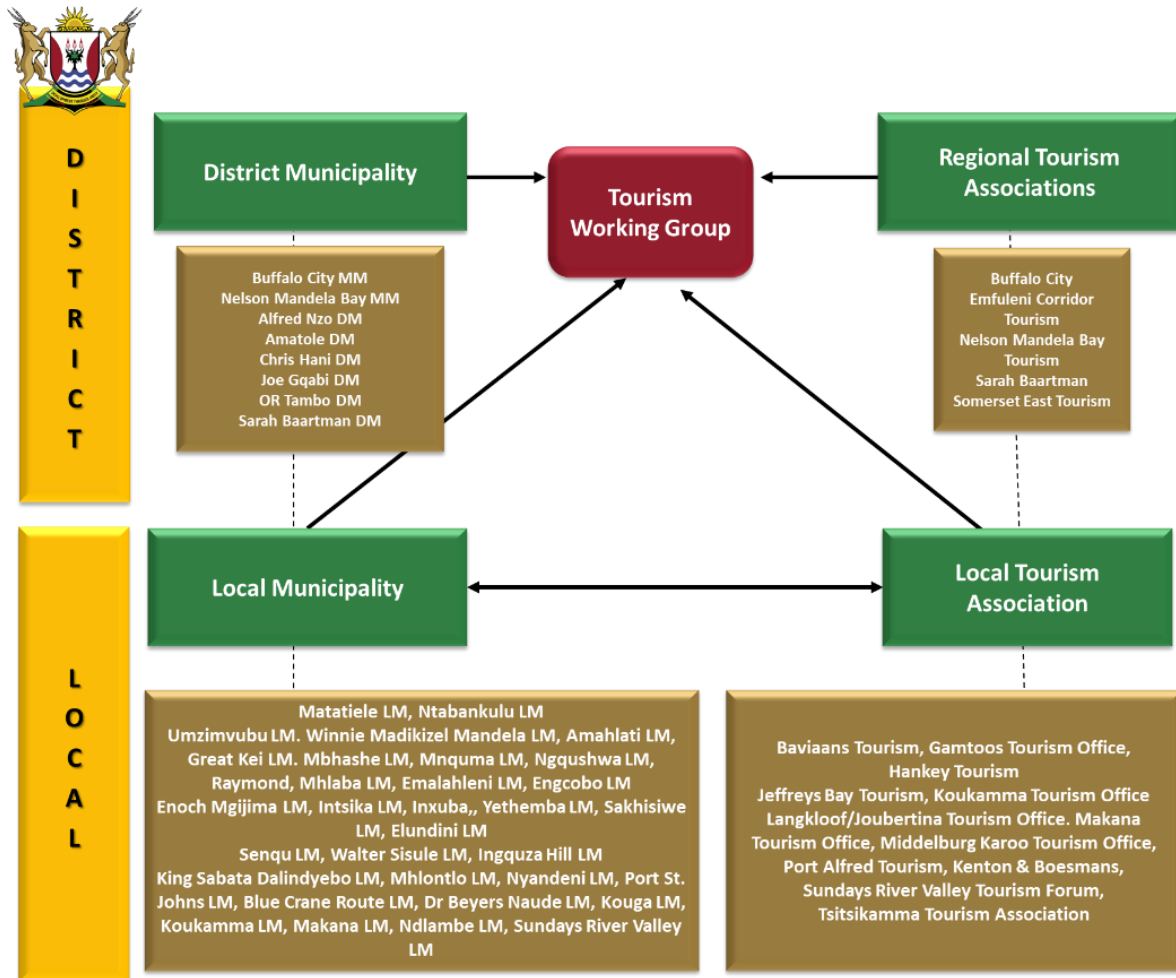
MEC Tourism Forum and Provincial Tourism Stakeholder Forums

This forum brings together the MEC for Finance, Economic Development, Environmental Affairs and Tourism, District/Metropolitan Council Chairs, the chief executive officers (CEOs) of provincial tourism marketing authorities, the CEOs of other relevant entities, and the South African Local Government Association to discuss and agree on cooperative tourism programmes and strategies. The MEC should be informed about provincial tourism priorities, interests, and challenges that require national attention so that these can be put forward for discussion by MINMEC.

The Eastern Cape is working on the development of various provincial tourism forums to address issues relating to tourism safety and transformation. These sessions will be structured and coordinated in a manner that will enable tourism stakeholders to raise concerns on the ground and work toward developing solutions with the relevant departments and organisations. Stakeholders are encouraged to participate in these sessions and give constructive input.

2.2.3 District and Local Level

Figure 3: Recommended Institutional Structure: District and Local Level



Additionally, tourism forums determine priorities to support sector growth and development at the regional level. The groups also facilitate cooperation and alignment with provincial tourism development priorities. This arrangement is replicated at the local level whereby municipalities and local tourism organisations (LTOs) communicate relevant tourism priorities and constraints to one another.

Regional Tourism Organisations (RTOs) and Local Tourism Organisations (LTOs)

Tourism-related responsibilities lie with the municipalities as well as the regional and local tourism organisations. The introduction of RTOs at the district municipality level and LTOs at the local municipality level has been welcomed by district municipalities in the Eastern Cape. These organisations are seen as good vehicles for supporting the growth of tourism and encouraging the involvement of all South Africans in the sector. At the district level, RTOs are being encouraged to transform their representatives as well as their programmes. The district municipalities are considering the provision of financial and non-financial support to certain RTO programmes once transformation has been achieved.

District and Local Tourism Forum

This forum is a district multi-stakeholder forum chaired by the Executive Mayor or the Chairperson of the Tourism/Economic Development Portfolio and attended by local mayors or chairpersons of the Tourism Portfolio and supported by officials. Participation should also include the Executive

Committee of the Regional Tourism Association to represent private sector interests and other relevant regional entities, including representatives of provincial tourism departments as well as the provincial marketing authority.

The Forum shall:

- deliberate and determine tourism priorities to support tourism growth and development in the region
- facilitate cooperation and alignment with provincial tourism development priorities
- confer relevant issues for consideration by the MEC Forum

The above arrangement can be replicated at a local level. District and local municipalities are to keep and up to date database of all tourism operators in their respective regions (supply database) which can feed into the provincial database.

SECTION 3: STATUS QUO OVERVIEW

3.1 Provincial Overview

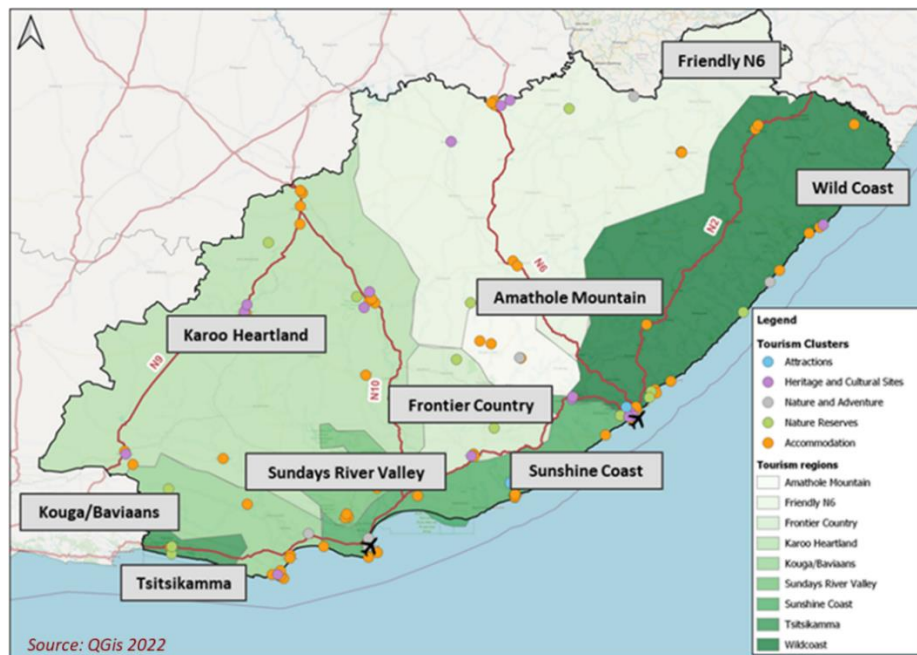
The Eastern Cape is bordered by the Western Cape province to the west, the Northern Cape province to the north-west, the Free State province and Lesotho to the north, KwaZulu-Natal province to the north-east, and the Indian Ocean to the south and south-east.

The Eastern Cape is predominantly mountainous in the northeast. It includes the Drakensberg, rising to more than 9,000 feet (2,700 m), and descends southward from the great interior plateau (Highveld) of southern Africa to form a relatively narrow coastal plain along the Indian Ocean. Southwest of the Highveld and the Great Fish River, the topography is characterized by east-west-trending mountain ranges and valleys. East of the Great Fish River, including the lower valley of the Great Kei River, perennial streams have carved deep valleys on their way to the ocean. The province's natural vegetation is largely grassland, with some forest biomes on the coast west of Humansdorp². Alongside the abundant natural wonders, the province is celebrated for a variety of cultural deposits that share the narrative of the province's proud people, ancient heritage and cultural traditions still observed today.

The province comprises nine tourism regions, each with a unique selling point. The regions are as follows:

- Amathole Mountains
- Frontier Country
- Friendly N6
- Karoo Heartland
- Kouga / Baviaans region
- Sundays River Valley
- Sunshine Coast
- Tsitsikamma
- Wild Coast

Map 1: Tourism Products Per Region



The Eastern Cape offers a wide range of attractions, including nature reserves, safaris, coastlines, adventure activities, and a variety of scenic beauty spots located throughout the province. Tourism

² <https://www.britannica.com/place/Eastern-Cape-province-South-Africa>

has been identified as a key sector for provincial growth and development. This is largely due to the competitive advantage of the Eastern Cape in terms of its unique selling points such as its diverse landscapes. Leveraging the brand and reputation of the province could see the growth of the tourism sector as an income stream for underdeveloped areas.

3.2 Tourism Performance

The Eastern Cape is home to a diverse range of natural attractions, from pristine coastlines to mountains, semideserts, world-renowned nature reserves, and untouched wilderness areas. The province also has a diverse cultural and historical heritage and is the birthplace of many Apartheid era struggle heroes³. Encompassing part of the popular Garden Route, the Eastern Cape links the popular tourism destinations of the Western Cape with those of KwaZulu-Natal.

From the Fynbos and forests of the Tsitsikamma, the Addo Elephant National Park, the mountains to the seaside, and the natural beauty of the Wild Coast- this coastal province is best enjoyed by road tripping through the various seaside and rural villages established along the way⁴. By leveraging these assets and building a stronger domestic market, tourism businesses in the province should be able to sustain themselves over the long term. This subsection focuses on the demand for tourism products. It identifies the reasons why tourists travel to the Eastern Cape, their spending patterns, and their length of stay. The figure below provides key statistics for the province's tourism performance in 2020.

Figure 4: Eastern Cape Tourism Demand Performance in 2020



Source: SAT Annual Tourism Report 2020

From the figure, it is evident that Covid-19 negatively impacted the province's tourism sector, particularly international tourism, through the travel restrictions that were imposed in 2020.

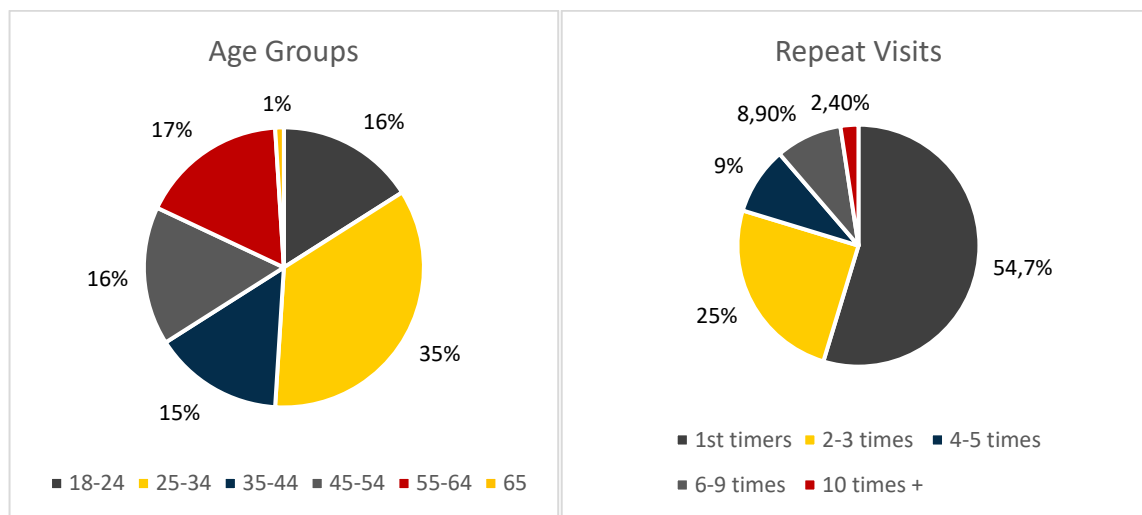
³ South African Venues. Available at: sa-venues.com/garden_route.html

⁴ Visit Eastern Cape. Available at: <https://visiteasterncape.co.za/regions/sunshine-coast/>

3.2.1 International Tourism Demand

International bednights in the Eastern Cape saw a 68% decline from 4.2 million in 2019 to 1.3 million in 2020, while tourism expenditure fell from R3 billion in 2019 to just under R950 million in 2020. Length of stay increased by 17% to a total of 12.3 nights. International travellers primarily visited the province for holiday reasons (62%) or to see friends and relatives (19%). As indicated by the figure, the same percentage of international visitors (3%) journeyed to the Eastern Cape for business as for meetings, incentives, conferences, and exhibitions (MICE).

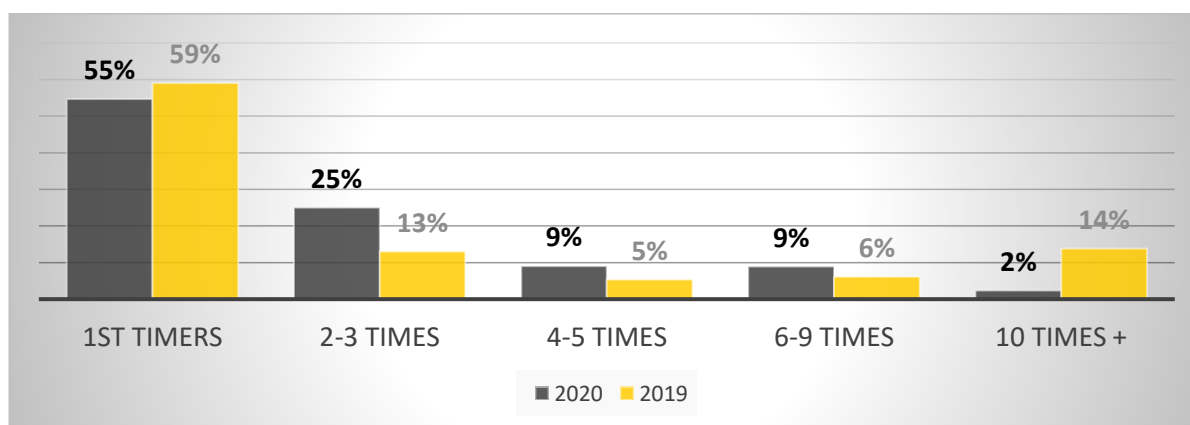
Figure 5: Age Groups and Repeat Visits



Source: SAT Annual Tourism Report 2020

Concerning the age of tourists, those in the 25 to 34 years range accounted for the largest share of visitors to the province (35%). The second-largest share (17%) comprised those aged 55 to 64 years, while 18- to 24-year-olds constituted the third-largest share (16%). Purpose of visit shows that most of the young visitors report VFR to be their main reason.⁵

Figure 6: International Repeat Visits



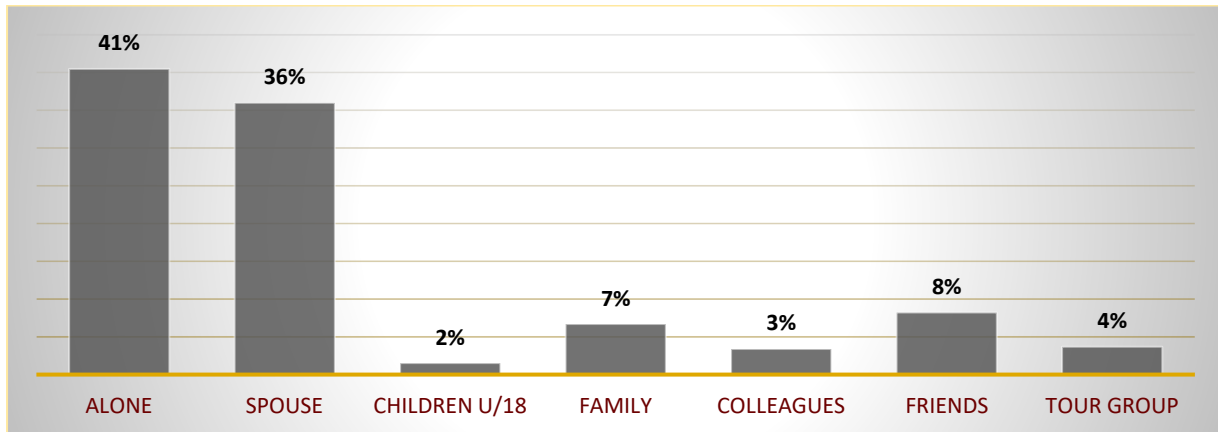
Source: SAT Annual Tourism Report 2020

The figure above indicates the percentage of tourists who were on repeat visits to the province in 2020. The percentage of those visiting for the first time registered a 4% decline to 55% of international travellers, compared to 59% in 2019. An increase in first-time visitors is always a good sign as it shows

⁵ SAT Tourism Performance Report 2021. International Tourism Performance.

that people are interested in exploring what the Eastern Cape has to offer and that the tourist product is relevant. There was a marked increase in the percentage of tourists who visited the province for the second or third time, from 13% in 2019 to 25% in 2020. Overall, repeat visits to the province show promising results and bear evidence of visitor satisfaction.

Figure 7: Travel Companion Trends

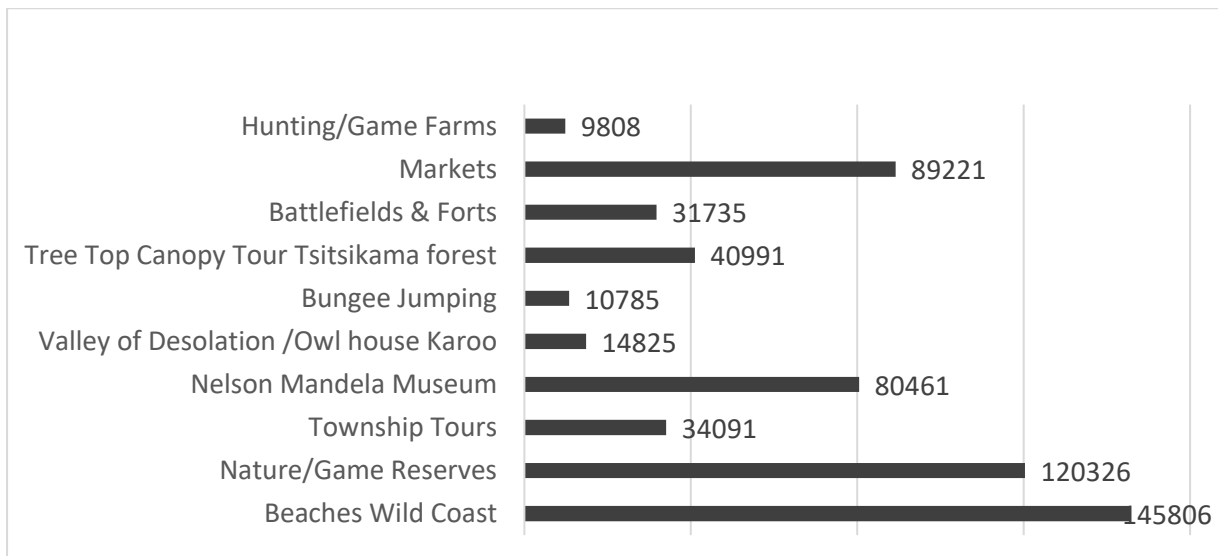


Source: SAT Annual Tourism Report 2020

Just over 40% of international tourists to the province in 2020 travelled alone; 36% travelled with a spouse. Few travelled with friends and family, especially children under the age of 18.

The most visited towns in the Eastern Cape are Gqeberha (formerly Port Elizabeth) and East London, followed by Jeffreys Bay and Grahamstown. The most popular attractions include the beaches along the Wild Coast, the nature and game reserves, adventure activities such as bungee jumping, and heritage and cultural activities such as township tours and museum visits.

Figure 8: Number of Visitors to Main Attractions in the Eastern Cape



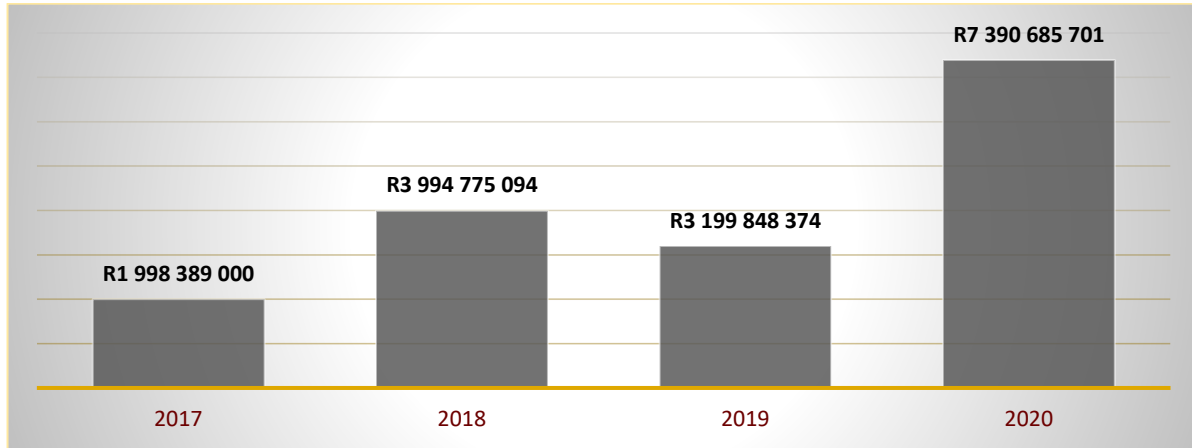
Source: SAT Annual Tourism Report 2020

3.2.2 Domestic Visitor Tourism Demand

In comparison to international tourism, domestic travel showed impressive growth of 81% from just over two million trips in 2019 to 3.7 million trips in 2020. One of the main reasons for this increase was the Covid-related restrictions on overseas travel and the resultant surge in local tourism. One of

the first pandemic recovery responses was to kickstart the sector by encouraging domestic travel and getting people to explore locally. These developments prompted a sharp increase in domestic tourism expenditure. Tourist spending jumped from 3.1 billion in 2019 to 7.3 billion in 2020.

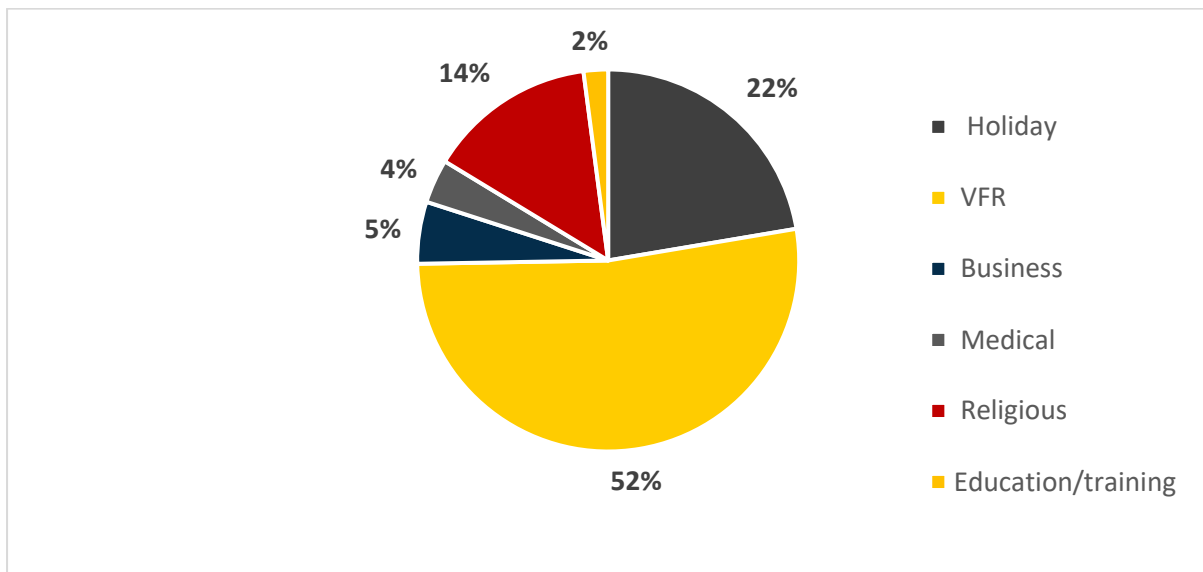
Figure 9: Eastern Cape Domestic Tourism Expenditure 2020



Source: SAT Annual Tourism Report 2020

The ultimate impact of tourist spending may, however, depend on the extent of linkages from the country or region and the ability of the region to create backward and forward linkages with other sectors⁶.

Figure 10: Purpose of Visit for Domestic Tourists in 2020

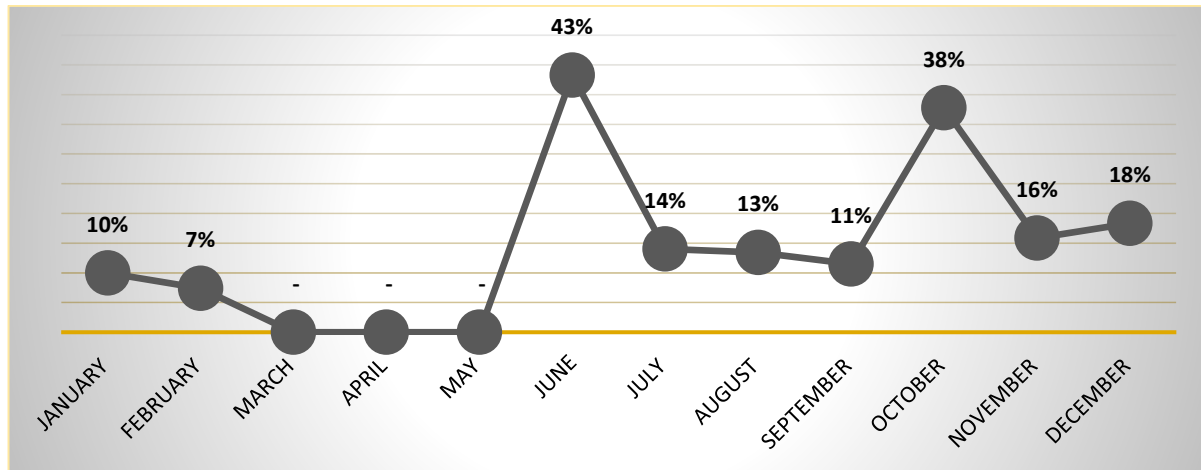


Source: SAT Annual Tourism Report 2020

The main purpose of domestic travel to the province in 2020 was to visit friends and family (52%); 22% of local travellers came to the Eastern Cape on holiday and 14% for religious reasons. This travel came after the initial hard lockdown restrictions and families were eager to reunite.

⁶ Saayman & Saayman 2011. Economic And Sectoral Effects Of Tourist Spending In South Africa: Regional Implications.

Figure 11: Domestic Seasonality



Source: SAT Annual Tourism Report 2020

The monthly tourist volumes fluctuated quite significantly. No travelling took place from March to May. Of the total number of domestic visits to the Eastern Cape in 2020, 43% took place in June and 38% in October. These fluctuations were mainly influenced by changes in lockdown levels and the accompanying travel restrictions.

3.3 EC Tourism Value Chain

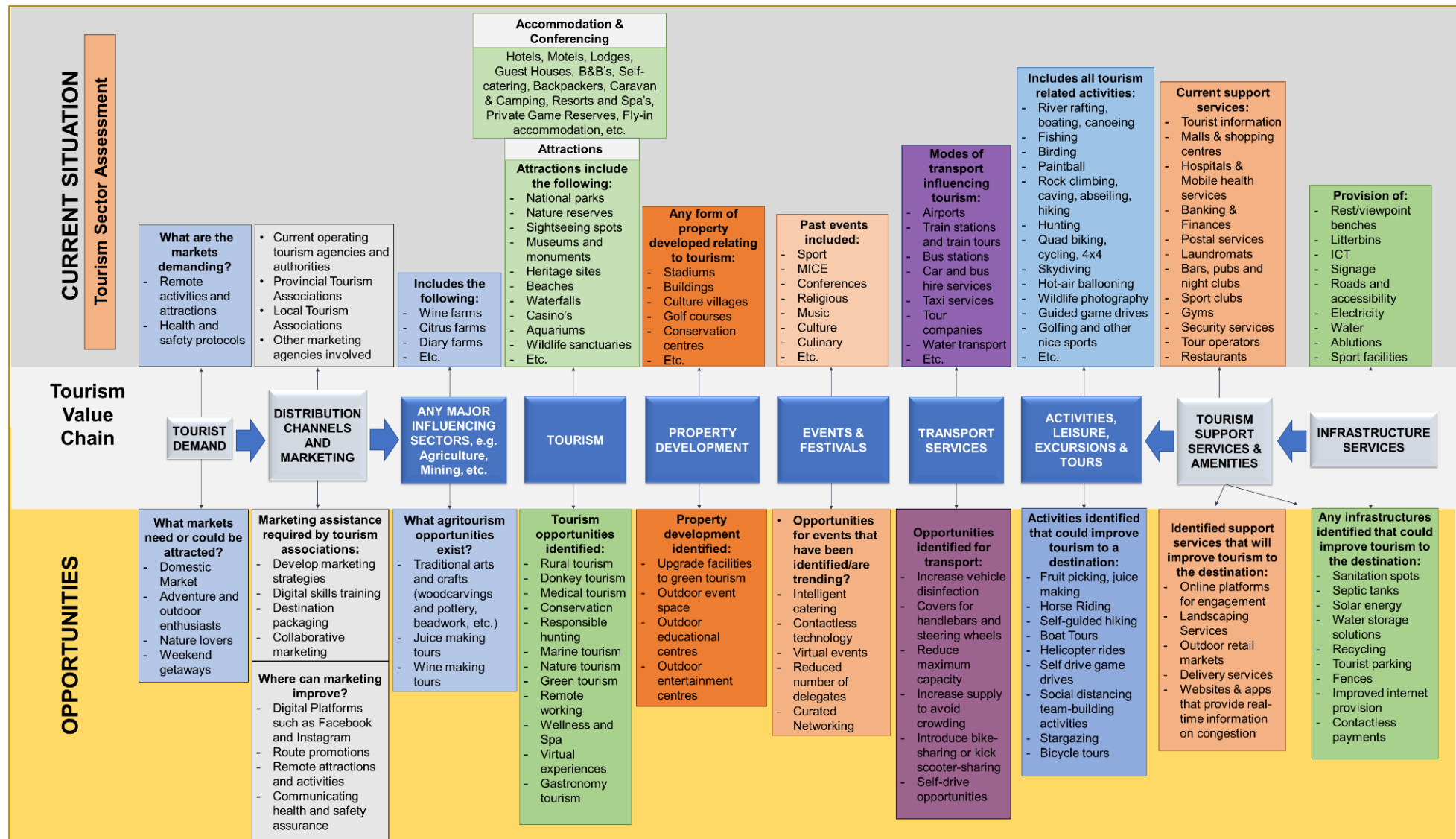
The National Tourism Sector Strategy (NTSS) describes tourism as fundamentally a collaborative endeavour for destination businesses in the sense that tourists experience a destination in its entirety and the success of their experience depends on all parts of the value chain working together seamlessly. A highly competitive tourism destination is one in which all of the linked and integrated services and inputs combine to provide a positive experience. This requires all stakeholders to work together to plan, execute, assess and constantly improve the tourism offering to increase market share and raise the domestic and international profile⁷. Preliminary recommendations include the following:

- Aligning clusters to existing tourism routes ensures that there is synchronicity and that communities participating in tourism initiatives are easily absorbed into the tourism value chain of the area.
- The reputation of the Eastern Cape as a preferred tourism destination is dependent on the quality of services rendered by tourism products across the value chain
- The impact of the pandemic has altered consumers' market demands that were satisfied by existing tourism value chains and business models during the pre-COVID-19 era.
- Challenges and opportunities concerning linkages vs. leakages within the value chain should be identified and addressed.

The figure below outlines a snapshot of the existing tourism value chain in the province-reflecting both the current tourism landscape as well as potential development opportunities to establish tourism growth and identify future development opportunities.

⁷ National Tourism Sector Strategy 2016-2026

Figure 12: Eastern Cape Tourism Value Chain



3.4 SWOT Analysis

A SWOT analysis has been used to audit and analyse the overall strategic position of the Eastern Cape within the South African tourism sector context. The SWOT method evaluates strengths, weaknesses, opportunities, and threats within a sector, and it can be used to inform future tourism planning and development in the province. The SWOT was developed from the secondary data used to produce the status quo report as well as from input received from tourism role players in the province during stakeholder engagements.

Figure 13: Eastern Cape Tourism Sector SWOT Analysis



3.5 Global Tourism Planning Trends

This section provides an overview of global tourism strategies and plans. The overview highlighted the following as significant elements to be addressed within tourism planning and development, even more so as the post-COVID tourism recovery approaches.

3.5.1 Experiential Travel



Authenticity and the promise of fun and adventure in unique locations are key in motivating tourists to travel to a specific destination. Consumers in developed economies are re-evaluating their spending habits and moving away from overt materialism to simplicity, authenticity, and individuality. Tourists are placing more value and focus on the quality and unique offerings of a destination to the point where leisure is no longer the main aim for travelling. For many, travel is seen as a way of understanding and appreciating alternative ways of life, learning new things about cultural and natural landscapes, and even as a means of self-discovery. Travelers seek to connect to a destination on an emotional level and not experience the place as a mere backdrop for activities that could easily be experienced elsewhere. People prefer experiences over purchases and, in particular, experiences that:

- allow tourists to recharge in nature
- are unique experiences that they can boast about, such as walking tours in cities renowned for culture
- provide sustainable adventure travel
- result in a unique story to take home and allow the traveller to get to know a country and its culture
- provide excitement in a scenic location

3.5.2 Information Distribution



The benefits of effective information and communication technology infrastructure are many: faster, cheaper digital technology that is scalable, can improve accessibility, enables business development and innovation, and helps visitors explore and enjoy the province.

Inclusion/ Accessibility

Inclusion and accessibility are essential goals for information distribution. Not only do they open up possibilities for all visitors to participate, but for residents as well. What it comes down to is providing the (potential) tourist with the best and fastest access to information.

Internet of Things (IoT)

The internet of things is an emerging concept of technical, social and economic significance. Consumer products, durable goods, cars and trucks, industrial and utility components, sensors, and other everyday objects are being engineered to include Internet connectivity and powerful data analytic capabilities that promise to transform the way we work, live and play. Projections regarding the impact of IoT on the internet and economy are impressive: some observers anticipate that as many as 100 billion IoT devices will be connected by 2025, with the global economic impact of IoT amounting to more than \$11 trillion⁸.

⁸ Internet Society. IoT. 2019. Understanding the Issues and Challenges of a More Connected World

Digitisation

A fully digitised range of services, bookable online (from accommodation and restaurants to city tours and theatre tickets) or as digital visitor guidance (via a guidance system, app, or smart wearables) are already standard in most major cities. Digital solutions can be utilised for innovative approaches to managing tasks.

Virtual Reality

Given the great potential of this technology in several areas (and for tourism in particular), there is now a proliferation of related applications for mobile devices. Augmented reality is applied in museums, monuments, galleries, open spaces, and tourism attractions in general. A tourist's experience of these attractions is complemented in real-time by diverse information (text, images, three-dimensional animations, audio, or video).

Mobile App Technology

Technology, especially the adoption of apps, will continue to drive this trend, and younger consumers will more quickly adapt to digital innovations. For example, there exists a stark difference in the use of services through mobile apps, as younger generations are three times more likely to use a mobile banking app and twice as likely to use a ride-sharing service compared to older generations.

Wi-Fi Provision

To value the tourist experience at the destination, free internet should be promoted in public and private places. The benefits of wi-fi include bridging the digital divide, improving city/town image, improving visitor/resident satisfaction, and spurring economic development.

Smart city initiatives for public wi-fi include:

- Wi-fi can be deployed with or in light-emitting diode streetlights to enable low-cost deployments over large areas.
- Smart trash bins can provide solar power and unique siting opportunities to extend wi-fi coverage areas.
- Digital kiosks and signs can enable wi-fi by using their existing network connections and can provide funding to support larger wi-fi deployments.

Mobile Visitor Centres

The concept of taking information to consumers resulted in Cape Town unveiling its third mobile visitor information centre (VIC) as part of the build-up to the Cape Town Cycle Tour. The mobile VIC is the first of its kind in Africa. Cape Town Tourism, the City of Cape Town's tourism partner, is responsible for providing visitor information services. Making use of its vast experience, Cape Town Tourism has been able to integrate technology into the provision of tourism information to ensure real-time access to this information. Features of the mobile centre include:

- Free information brochures on tourism in the city
- Booking services
- Ticketing services
- Wi-Fi in the proximity of the vehicle
- Sales of certain products

3.5.3 Culinary Events



Nothing brings people together quite like food. People seek unique eating and drinking experiences as well as the wild and wonderful combinations of ingredients and flavours for which certain destinations have become known. This form of tourism is perfect for showcasing a region's local produce and cuisine. Hosting culinary events is also ideal for attracting people of all ages. In conjunction with entertainment and other activities, it can contribute in a meaningful way to the local economy and enhance local pride in tourist offerings.

3.5.4 Pedestrian Culture



More cities are creating inclusive and connected nodes (integrated leisure complexes) where people can work, live and enjoy leisure activities in the same space. Pedestrian-focused infrastructure is a significant focal point in tourism development. Pedestrian walkways and bridges are designed with accessibility and safety in mind. Tourists also benefit from this as it creates a safer and more convenient environment for them. Jogging tracks benefit both everyday walkers and health-conscious tourists – an emerging trend – who choose to exercise while on holiday.

3.5.5 Sustainable and Responsible Tourism



Protecting and conserving various aspects of the environment is one of the top priorities in infrastructure development and consumer trends. Just as they must keep abreast of technological advancements, tourism destinations need to acknowledge that tourism may have negative environmental impacts and actively implement sustainable practices within all relevant industries. Eco-friendly services and products have become a strong motivating factor for tourists when it comes to planning a trip, booking accommodation and deciding which activities to participate in.

3.5.6 Supporting Local Tourism



The influx of revenue that occurs as a result of visitor spending can be reinvested to make the community a better place for local residents. Moreover, improvements in quality of life for local residents as a result of tourism investment can help to make a community more attractive to other industries. Below are some ways that communities can leverage significant trends in the sector:

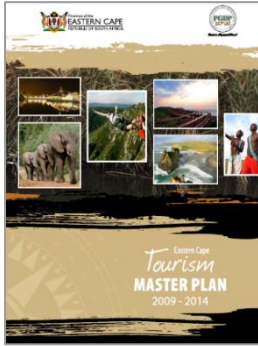
- develop attractions that highlight the unique cultural or natural aspects of a destination and that allow visitors to experience the place in a way that is more meaningful than with traditional sightseeing
- support the growth of the sharing economy to exploit existing capacity and resources; formal tourism infrastructure can then be built on this foundation
- market and promote through social media, appealing to tech-savvy travellers who rely on online recommendations and reviews to make destination decisions.

These tourism trends will inform interventions specific to the Eastern Cape to ensure that the Tourism Master Plan is fully aligned with the latest trends in tourism planning and development.

SECTION 4: STRATEGIC FRAMEWORK

4.1 Appraisal of Previous Strategy

The Eastern Cape Tourism Master Plan (2009-2014), which preceded the latest TMP, undertook a thorough review of the Tourism Master Plan 2003 – 2007 to assess its strengths and weaknesses. The 2009-2014 plan put forward recommendations relating to provincial growth and development as well as opportunities for leveraging major sporting events and addressing tourism safety. It also outlined the roles and responsibilities of tourism associations associated with local government.



The 2009-2014 document provided a framework for the development, management, and monitoring of tourism in the province to pre-empt problems and mitigate impacts. It also sought to foster and maintain equitable relationships between the various stakeholders as well as intersectoral cooperation.

4.1.1 Strategic Approach and Implementation

The strategic direction for the 2009-2014 plan was provided by the Eastern Cape Tourism Summit that was held in 2007. Delegates to the meeting identified the eight priority areas for the sector:

1. Tourism product development
2. Tourism marketing
3. Human resource development
4. Development of tourism-relevant infrastructure
5. Transformation of the tourism sector
6. Tourism research and information
7. Tourist safety and security
8. Management of the tourism sector

These areas were then addressed with regard to key principles, legal issues, programmes linked to the focus area, main issues, and high-level actions.

In terms of actions for implementation, the plan did not lay out a structured plan that identified key projects, how they should be executed and by whom. However, it did link priority area objectives with a summary of the main actions that were identified to alleviate the challenges associated with that specific area. Timeframes and responsible parties were not allocated, and priority levels were not indicated.

4.1.2 Strategic Guidance

The 2009-2014 strategy was widely accepted and regarded as a solid framework for tourism development. However, there were concerns regarding the implementation of the plan, seen by some as too difficult to navigate, too expensive to execute – or both. These concerns have been taken on board with the development of the latest plan in that it should be concise and practical. The actions stipulated by the plan for developing the tourism sector should be clearly articulated and within the ability of stakeholders to implement.

4.2 Master Plan 2022-2033 Vision

The vision for the Eastern Cape tourism sector is the following:

“An inclusive, diverse, and innovative tourism sector that offers unique and memorable experiences that are driven by stakeholder collaboration, skills development and service excellence, that contributes to sustainable growth and development of the Eastern Cape”

4.3 Purpose of the Master Plan

The primary purpose of the TMP is to provide a comprehensive framework for the tourism sector in terms of planning and development challenges and interventions. The plan also translates policy intent, legislative mandates, and strategy frameworks into actions that can be implemented. Further, the TMP:

- Provides a framework aligned to policy, legislation, and strategy that can address industry development needs
- Serves as an instrument to address gaps that hinder tourism development as identified in the situational analysis report and beyond
- Provides a broad implementation framework for the identified priority areas

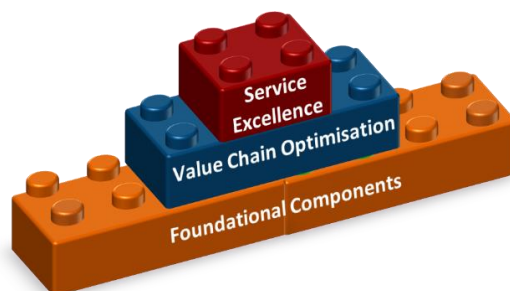
4.4 Strategic Objectives

1. Ensure that infrastructure in the Eastern Cape supports a **high-quality tourist experience** in the entire tourism value chain
2. Ensure that the Eastern Cape tourism sector supports a **safe and secure environment** at all tourist touchpoints
3. Market and promote the Eastern Cape in such a way that tourists see it as a destination that **offers unique and high-quality products**
4. Create an environment that promotes the **development and enhancement of skills** in the tourism sector
5. Ensure the availability of comprehensive, quality, user-friendly, **accessible, and objective tourist information** at all the tourist touch points in the province
6. **Improve coordination** between local, provincial, and national bodies responsible for tourism marketing
7. Ensure that tourism planning, and decision making is informed by **accurate, consistent, and up-to-date research information** that is aligned to national data standards.



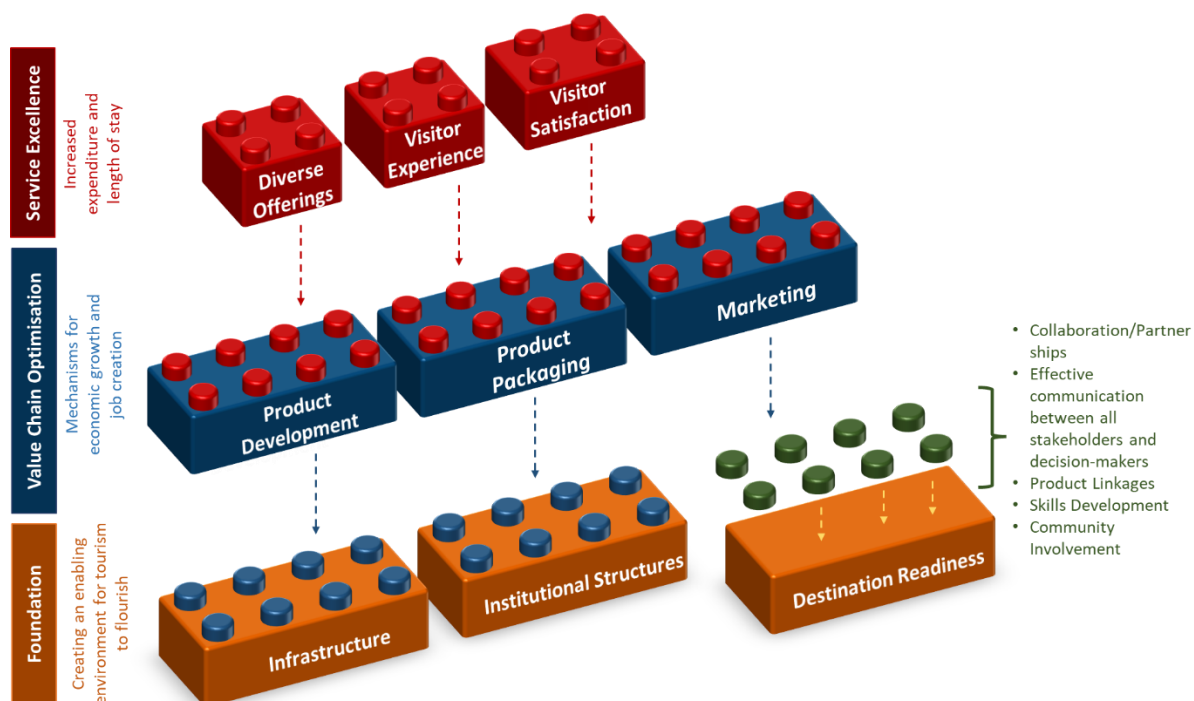
4.5 Strategic Direction

During the stakeholder engagement process, various themes emerged that overlapped across the different regions in the province. These themes relate to laying a proper foundation for tourism: *“getting the basics right”, “going back to the drawing board” and “re-establishing the groundwork of the tourism sector first, before trying to build more and add new developments”*.



Based on this response, the current Master Plan seeks to show the structure of the tourism sector, particularly the foundations that should be in place for it to function optimally. The figure below illustrates the importance of first establishing a solid foundation for tourism that will create an enabling environment for it to grow.

Figure 14: Strategic Direction



Achieving service excellence and visitor satisfaction is the main goal as this will result in repeat visits and an increase in tourism expenditure and length of stay. However, certain mechanisms and processes need to be in place before a destination can successfully host tourists. This is where the foundation of the tourism sector is of utmost importance in achieving sustainable growth.

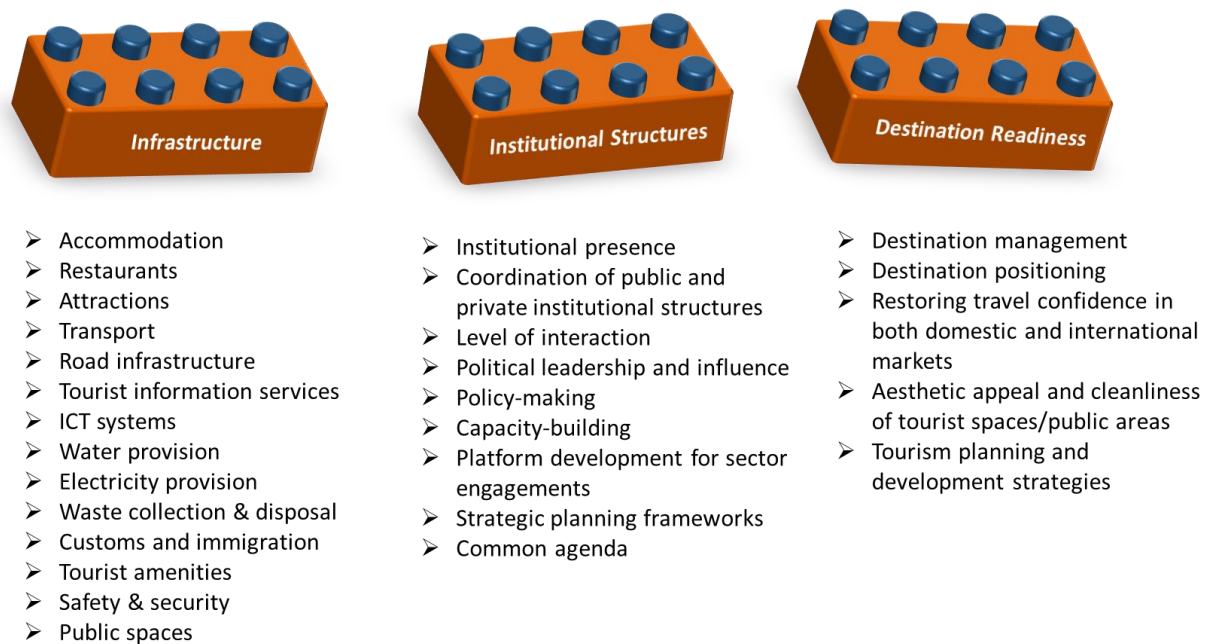
The relevant primary building blocks need to be laid out first before further development can take place. The strength and effectiveness of the foundation will determine the position, longevity, and strength of the sector over the long term.

4.5.1 Securing the foundation

The foundation is what supports the sector and bears weight. Likewise, it is the foundation of the tourism sector that supports tourism supply and demand, and that has to carry the weight of uncertainty, unforeseen events (e.g. a decline in tourism during the pandemic), and other relevant impacts. A solid foundation will keep the tourism sector stable. Unfortunately, there are cracks in the

foundation of the tourism sector in the province. These cracks are compromising the stability of the sector and are rendering it vulnerable. The figure below outlines the main foundational categories and the key components under each that need intervention.

Figure 15: Foundational Components of the Tourism Sector



Stakeholders are largely concerned with fundamental (foundational) challenges that present barriers to tourism growth. Throughout the engagements, they emphasised “getting the basics right” and also called for stronger communication to be established between relevant parties. The Eastern Cape has sufficient tourism supply and opportunities; however, it is difficult to mobilise this potential when fundamental processes are not taking place.

The key components that cement the building blocks together and act as links between the different levels of operations within the tourism sector include the following:

- Collaboration/Partnerships
- Effective communication between all stakeholders and decision-makers
- Product linkages
- Skills development
- Community involvement

These should be prioritised and implemented throughout the sector to guide, monitor, and evaluate progress in the province. Correcting and strengthening the foundational building blocks of the Eastern Cape tourism sector will have an immensely positive impact on development and implementation with the benefits flowing to all.

4.5.2 Value Chain Optimisation

For the province to reap the benefits of tourism growth, linkages between the various industries within the tourism value chain must be developed. When the foundation is laid and the relevant processes are in place and implemented, an enabling environment is created for the value chain to operate successfully as well. Key categories here include product development, product packaging, and marketing. With the correct structures in place to develop and establish tourism products, package them to cater to tourist demand and market them effectively to reach those target markets, the tourism sector will grow and see an increased flow of benefits. Through value chain optimisation,

an inclusive sector can be established that facilitates market access, employment creation, skills development, and SMME funding and support.

4.5.3 Visitor Satisfaction

Tourist satisfaction can be defined as “the extent of the tourist’s fulfilment pleasure which occurred from the trip experience about a product or service feature that fulfills the tourist’s desires, expectations and wants in association with the trip”⁹. Measuring tourism satisfaction is important for the following reasons:

- ✓ Satisfied tourists stay longer, spend more, and come back
- ✓ They promote the provider on social media and online ratings, thereby contributing to business and destination competitiveness
- ✓ They bring friends and family on their next visit
- ✓ Satisfaction with vacation time impacts their overall quality of life
- ✓ Tourism is about consuming an unknown product in unfamiliar surroundings and is classified as an “export” in economic terms¹⁰.

The main goal is to provide those who visit the province with unique and high-quality experiences through product and service delivery. As highlighted above, providing tourism attractions and activities that result in high levels of satisfaction will enhance the province’s competitiveness and position it as a leading tourism destination.

⁹ Severt, D., Wong, Y., Chen, P. and Breiter, D. (2007) Examining the motivation, perceived performance and behavioral intentions of convention attendees: Evidence from a regional conference. *Tourism Management*, 28, 399-408

¹⁰ Tourism Satisfaction: Importance, Measurability & Impacts. 2020. EHL Insights. Available Online at: <https://hospitalityinsights.ehl.edu/tourism-satisfaction>

SECTION 5: PRIORITY DEVELOPMENT AREAS

5.1 Destination Accessibility

5.1.1 Introduction

The accessibility of a destination takes various forms. To begin with, potential visitors need to be able to access information about a destination when doing research or planning and booking a trip. They usually do so using the various distribution channels used by a destination to market itself.

Accessibility is also a matter of whether the destination can be easily reached (i.e. whether transport is available and the roads usable). Once the tourist has reached their destination, ease of access is determined by whether they can make their way to and from attractions and activities (gateways, infrastructure). This is especially the case for people with disabilities and the elderly (seniors with access needs). Destinations should cater to such visitors (e.g. by providing lifts, ramps, handrails, etc.) so that they can comfortably get around and have an enjoyable experience. The tourism sector must address accessibility requirements sooner rather than later. What is needed is a much more detailed understanding of consumer needs.

The extent to which the province is served by domestic and international flights is of central importance to accessibility, as this brings visitors from around the world to experience what the region has to offer. A better understanding of airlift barriers (i.e. routing, capacity, and pricing) is required. This will allow the aviation and air transport industry as well as the relevant government departments to motivate and plan effectively for changes where required.

5.1.2 Main Challenges

The following main challenges applicable to destination accessibility have been identified for the province:

- Access roads are in terrible condition and are in dire need of repair and maintenance
- Road safety is a problem (e.g., strikes, stray animals etc.)
- Lack of airport and flight availability in some regions
- Lack of tourism signage and tourist information in general
- Digital transformation is lacking (venues don't have the correct equipment, no wi-fi provision, insufficient digital presence, etc.)
- Cruise terminal accessibility and lack of dedicated cruise promotional material, and joint marketing initiatives on a national level.

Signage Mismatch

Certain signs throughout the province reflect the new town names, however, signs are still in place with the old town names. This can be very confusing to tourists trying to navigate through the different tourism regions. Many of the new names also do not feature on printed maps or on Google Maps, which is not very helpful for self-drive travellers.

5.1.3 Key Considerations

Travel Access

Many roads in the province have become increasingly dangerous and feedback from unsatisfied tourists and product owners only emphasises the dire need for action. Stakeholders are frustrated with local government as their grievances are neither acknowledged nor attended to. The main roads used for tourism must be upgraded and maintained to improve access to the province and tourist attractions located between towns and cities.

Signage

Signage plays a crucial role in tourism and has many functions: it attracts visitors, provides directions and wayfinding, informs and educates. The province, however, is battling a signage backlog. This impacts the visibility, awareness, and marketing of tourism products. The lack of signage makes the roads less accessible to tourists, eliminating the benefits that could be derived from self-driving tourists making impromptu visits to attractions as they pass through the province.

Innovation in signage creation should be explored to deliver signs that are less aesthetically intrusive, and which have the following characteristics:

- Environmentally friendly
- Aesthetically invisible
- Technologically informative
- Enhances safety for the traveller
- Proactively assists with rescue and recovery
- Requires minimal maintenance and has no theft value

“The N2 national Wild Coast road project will see the construction of two mega-bridge structures on the Msikaba and Mtentu Rivers, seven additional major river bridges and several interchange bridges, as well as new intersections, interchanges, pedestrian walkways and agricultural under and overpasses. The N2 Wild Coast Road, which stretches 410 km from the Gonubie Interchange in East London to the Mtamvuna river near Port Edward, will shorten the current distance by 85 kilometres in comparison to the current route. It is estimated that the project would create between **21 000 to 28 000 indirect jobs** during the construction phase and **8 000 direct full-time jobs** when completed.”

-News24, 23 September 2021



5.1.4 Recommendations for Destination Accessibility

- Ensure global principles are adopted in the design and operation of accommodation facilities.
- Provide relevant and reliable product information on marketing agency websites and business websites.
- Conduct tourism signage audits/mapping to identify and address signage needs and challenges. Review existing signage and improve where necessary.
- Identify and prioritise the main tourist routes that need repair/maintenance within each municipality.

- ECPTA, DEDEAT, and municipalities should communicate on this road issue and produce solutions as products are losing business because of this challenge.
- Challenges relating to the process to get permission to put signage up along roads need to be addressed. Not all stakeholders are aware of how the protocol works which leads to delays. More guidance and awareness creation are needed from the provincial government on these processes.

5.2 Destination Management

5.2.1 Introduction

Destination management has a direct impact on the success of the tourism sector. It establishes the foundation that the tourism sector is built on. Successfully maintaining a tourism destination requires a lot of work, information integration, and strong human resource development. Accommodation establishments, for example, should aspire to be graded: to raise and maintain accommodation standards in the industry. Marketing, accessibility, infrastructure development and maintenance, and providing training and skills development to the workforce all contribute to the success and sustainability of a tourism destination.

5.2.2 Main Challenges

The following main challenges applicable to destination management have been identified for the province:

- Lack of sufficient support for local tourism organisations and tourism products
- Lack of access to restroom/ablution facilities, both en route to and at the destination
- Not learning from past mistakes. What has been attempted in the past? What went wrong? How can we improve/move forward from this?
- Infrastructure is a problem, notably poor electricity, and water supply. This is currently a problem in urban areas as well as in rural areas.
- Lack of maintenance on existing tourism offerings.
- Lack of sustainable financial support.
- Lack of adequate passenger facilities at ports
- Insufficient marine infrastructure to accommodate cruise ships
- Lack of cruise data- both economic and market-related

5.2.3 Key Considerations

Infrastructure Development and Maintenance

Attention should be given to improving and revitalising existing infrastructure that services the tourism sector before efforts are made to build and develop new infrastructure in the Eastern Cape. Due to limited (in most cases, a lack of) resources and capacity in the sector, it is unproductive and wasteful to undertake elaborate projects for which no consultation has occurred, and which absorb funds that could have been used more effectively elsewhere. Proper research should be conducted before new developments are approved, as experience has shown that such developments in many cases end up as white elephants. Stakeholders have highlighted the problems posed by dilapidated and decaying tourism infrastructure across the province that is hindering tourism growth and development. This needs to be prioritised to eliminate challenges relating to health and safety and so create an enabling environment for tourism.

Infrastructure maintenance is a big problem in the province. The challenge lies not merely in providing the necessary infrastructure to sustain tourism activities, but rather in a proactive approach towards establishing and subsequently maintaining this infrastructure at its optimal level.

Additionally, areas or sites identified for development need a guiding toolkit to direct actions. Most developers/local authorities still focus on physical development and do not even consider the visitor experience. What is the story and how will the interactions be immersive and compelling? What is the 'heart' of the development, the experience-creating elements?

Tourist Safety

Tourist safety plays a very important role in the visitor experience and the establishment of a destination's image. Stakeholders should create safe and clean environments in which tourists can move. Should a destination be branded as unsafe due to high levels of crime, tourism will certainly be negatively affected. Tourist safety and security should be a top priority for destination managers.

Stakeholders have identified numerous sites that are unsafe for tourists and where incidents of tourists being scammed, threatened, and robbed (e.g., by criminals impersonating law enforcement personnel) have been reported. This matter needs to be addressed urgently. Such incidents result in:

- Brand and perception damage for the province around the world as a result of negative press
- Trust in law enforcement officials being undermined

One of the biggest contributors to petty crime as reported along the Wild Coast is that there are no perceived benefits to the community from tourists. If this perception isn't changed, there will be an escalation of petty crimes like:

- ✓ The harassment of tourists to extort money:
 - car guards at tourism attractions
 - guide access
- ✓ Setting up of self-proclaimed tolls at a tourist attraction
- ✓ Robbing hiking groups that do not make use of guides or homestays

Getting the community involved in crime-fighting efforts could help to alleviate the problem, especially as many in these communities are themselves negatively affected by safety and security issues. Having more eyes on the ground might increase the success rate of strategies to eradicate crime, specifically in tourism hotspots. It will take a collective effort on the part of the private sector, government, and communities to address this challenge.

The ECPTA Tourism Safety Forum

This forum exists to address tourism safety-related matters.

Its objectives are to:

- Facilitate capacity-building programmes to enable people to drive development
- Partner with various institutions/businesses for capacity-building programmes (training, mentorship, etc.)
- Facilitate compliance of tourist guides through registration
- Initiate and implement tourism safety programmes in partnership with relevant stakeholders

The implementation plan will address the following:

- Establish a tourism safety forum
- Safety assessment of tourist attractions
- Tourism awareness and education
- Capacity-building compliance
- Communication protocols
- Victim support programme

The forum will meet quarterly and will also participate in provincial joint meetings. It will collaborate with the South African Police Service (SAPS) and join municipal safety and security cluster initiatives.

Recommendations

- Associations should also be invited to these sessions.
- There should be a report back from a representative at the meeting to other tourism stakeholders.

Basic Service Delivery

Effective and reliable service delivery is one of the biggest challenges South Africa faces. This is largely due to municipalities across the country not having the required resources to provide basic services to the communities in which they operate. The lack of resources and adequate infrastructure derails economic development and growth opportunities in poor communities¹¹. In the end, these challenges halt progress in other areas such as tourism development in the Eastern Cape. Other causes for poor service delivery include “corruption, political patronage and skills deficits at local administrative levels”¹².

Tourist amenities such as fuel stations and beach ablution facilities in the province often lack water or electricity. Tourists cannot be accommodated and presented with service excellence when basic services are not being provided in certain areas. This is a major concern for sector role players and was flagged in numerous stakeholder engagements. Participants pointed out that product development and marketing could not occur if these basic measures were not in place.

Stakeholder Coordination

To grow tourism well in the Eastern Cape, there must be effective communication, alignment, and cooperation between stakeholders. Such communication and cooperation need to be coordinated by the provincial department responsible for tourism, in this case, DEDEAT. This component is further addressed in Section 6, which deals with the institutional framework for tourism in the province.

Tourism Data Management

Data management is critical for tourism planning, development, and marketing. The current lack of data is a barrier to marketing efforts that could be more focused on the preferences of target markets. Primary data collection should be instituted, and the results made available to all sector stakeholders to inform and guide marketing and planning approaches.

EC Tourism Information and Data Collection System¹³

ECPTA is in the process of setting up a tourism information and data collation system. Tourism statistics in South Africa are well-established at a national level and reported at the provincial level.

However, the statistics at the sub-national level are not reported timeously and lack substance in addressing the needs of provincial authorities. To address this issue, the Eastern Cape Provincial Tourism Knowledge, Information, and Data System Framework was developed. Currently, the province does not have a tourism research function, but this approach will assist ECPTA to ensure the function is capacitated and delivers on addressing questions like:

- Why are tourists visiting the different regions in the province?



¹¹ DBSA Official Website. The impact of municipal infrastructure in basic service delivery in South Africa.

¹² Zerihun, Mulatu Fekadu & Mashigo, Mariann. (2022). The Quest for Service Delivery. Africa's Public Service Delivery and Performance Review. 10. 1-9.

¹³ ECPTA official website: <https://visiteasterncape.co.za/news-centre/tourism-research-is-the-blueprint-for-effective-decisions/>

- What are their preferences, travel patterns, key activities, and primary attractions?
- What are potential and current tourist perceptions and satisfaction levels?
- How well is the tourism sector performing?
- What challenges are experienced by the tourism sector?
- How successful are the marketing and branding campaigns of the ECPTA?

The information will enable the province to monitor the performance of tourism and its impact on the economy. The research will also provide valuable decision-making data for planning and development purposes, that will help to determine trends and seasonality.

It is important for tourism research to be efficiently interpreted and relayed to destination planners and marketers to guide meaningful responses (e.g., through strategies, and development plans). The province should monitor what visitors feel about the destination and what they are posting regarding the various regions/products in online reviews.

5.2.4 Recommendations for Destination Development

- Matters relating to safety must be afforded priority status by law enforcement officials at all levels.
- Capture tourists' safety concerns and embark on awareness creation campaigns to educate communities on the value of a tourist.
- Employ mobile VICs in more peripheral/rural areas to provide tourists with information.
- Petrol attendants can be destination ambassadors by referring tourists to sites and attractions.
- Deploy tourism monitors/ambassadors at identified hotspots throughout the province.
- Implement wi-fi provision that is subject to a short survey to gather high-level tourist information.
- Tourism database development and maintenance are critical for communication, information sharing, marketing purposes, and tourism development planning.
- Strong collaborative relationships throughout the tourism sector value chain are essential so that excellent service delivery can be experienced from the initiation phase to the departure phase of visitor experiences.
- Publish a positive image newsletter to share success stories in the tourism sector.
- Safety awareness programmes through various service stations should be explored.
-

5.3 Product Development

5.3.1 Introduction

Product development is a critical component of the TMP and plays a vital role in the future growth of the Eastern Cape tourism sector. Tourism product development is largely concerned with the creation of new tourism products or the revitalisation of existing tourism products in the province. Tourism products include accommodation, attractions (such as nature-based, cultural or historical sites; adventure tourism, beach tourism, etc.), hospitality venues such as conference areas, and restaurants. Products can also include routes or trails where transport infrastructure is used to link two or more tourism products to each other.

Product innovation is vital to the effective growth of tourism in any destination. To gain a competitive advantage over other tourist destinations, it is important to keep up with tourism trends. Product offerings form the foundation of a tourism destination, and the quality thereof should ultimately meet or exceed visitors' desires and needs.

Product development usually takes place at the local or district government levels. Furthermore, it is usually undertaken by the private sector or community groupings with the assistance of non-governmental organisations (NGOs) or local government. However, the provincial government does have a critical role to play where a product traverses more than one district as is the case with a route, or where the local or district capacity requires provincial interventions to ensure that product development takes place.

5.3.2 Main Challenges

The following main challenges applicable to product development have been identified for the province:

- Attempts are being made to get initiatives off the ground, but a lack of support and sector collaboration undermines these efforts.
- Growth and innovation are limited by the tendency among certain stakeholders to use outdated approaches.
- Lack of maintenance of tourism products, e.g. hiking and biking trails etc.
- Lack of market access for SMMEs.
- Limited integration of local communities and previously neglected groups into tourism.
- Lack of funding to ensure sufficient product development.
- Lack of market data to inform tourism development, e.g. information on travel preferences.
- Lack of stakeholder coordination and collaboration to drive product development processes.
- Tourism development in rural areas is faced with numerous infrastructure and value chain challenges.

5.3.3 Key Considerations

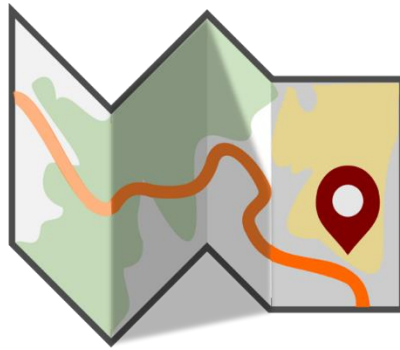
Tourism Route Development

In South Africa, considerable activity surrounds the development of “route tourism”. This involves linking together the tourism resources of several smaller centres and collectively marketing them as a single tourism destination region. For many of the country’s small towns, route tourism is a vital component of local economic development.

In the Eastern Cape, the different tourism regions listed in Section 3 are marketed in clusters to showcase tourism products in these areas. These regional clusters are often mistaken for tourism routes such as the Tsitsikamma Adventure Route and the Karoo Heartland Route. Of the official tourism routes that do exist, only a few are active, including Route 67, the Coastal Route, the Baviaans Wilderness Route and the Amatole Mountain Escape Route. Moreover, these routes are not actively marketed as such. While tourism routes continue to be developed (e.g. the Langkloof Fruit Route, the Blue Crane Route, and the Mohair Route), this process requires structure, support, and proper coordination – including through packaging and marketing.

Tourism routes are tools that can be used to market tourism products effectively in each region. They provide an opportunity for packaging tourism offerings in a way that encourages a wider geographical spread of tourists. Tourism routes are an ideal way of showcasing aspects that make a destination unique (e.g. historical and cultural elements) while spreading the benefits of tourism to more than one product owner.

Challenges arise, however, when the attractions of a particular route are not especially noteworthy, it puts the justification of the route in question. In other cases, the brochures or websites for routes are outdated and give incorrect information. Attractions along the routes may be closed, run-down or lack signage.



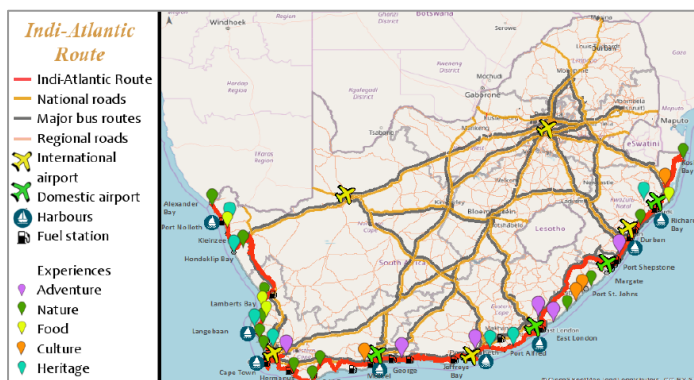
1. Proper Market Research
2. Product Audit
3. Unique Selling Points
4. Size of Member Base
5. Brand Identity
6. Governance and Operational Structure
7. Finances

Elements to consider when it comes to evaluating the effectiveness and success of tourism routes are as follows¹⁴:

1. The route must be grounded in solid market research that identifies key target markets and their needs. This must be done on an ongoing basis to ensure that route stakeholders are responsive to trends and shifts in markets.
2. An audit should be done on the tourism products in the area, including all natural and cultural assets. It may be valuable to determine criteria for inclusion in the route to ensure consistency of quality in the travel experience.
3. Scrutinise the assets to determine the unique selling features of the area and then develop a macro-level strategic plan to consolidate tourism planning for the area.
4. Determine the size of the membership base of suppliers on the route. The buy-in of these members is critical to the success of the route as they are the ultimate delivery agents of the experience. It is important to ensure the product mix is diverse and does not over-represent any of the sectors (e.g. accommodations) as visitors will expect a well-balanced experience.
5. Members should establish a clear brand identity for the route and then market this according to the targets identified.
6. Members should decide on what sort of governance and operational structure they need to ensure that the route is maintained.
7. Members should think long-term about the finances required to make the route a success in the minds of visitors. Many routes start small and can take 20 to 30 years to mature and deliver substantial economic benefits, therefore, realistic goals should be set for a return on investment.

Indi-Atlantic Route

Operation Phakisa, a project that seeks a more efficient response to development challenges described in the NDP, focuses in part on South Africa's ocean economy. Operation Phakisa – Oceans



Economy, initiated in 2014, has identified coastal and marine tourism (CMT) as a priority growth area. The national Department of Tourism is coordinating CMT initiatives, including the development of the Indi-Atlantic Route. An analysis of supply and demand was commissioned by the department to assess the state of tourism in the four coastal provinces: the Northern Cape,

¹⁴ Lourens, M. (2007) Route tourism: a roadmap for successful destinations and local economic development, Development Southern Africa, 24:3, 475-490

the Western Cape, the Eastern Cape, and KwaZulu-Natal.

Following the study, the Orange River Mouth in the Northern Cape, the Hole in the Wall formation and Coffee Bay in the Eastern Cape, and the Harold Johnson Nature Reserve in KwaZulu-Natal were prioritised for development. This decision was informed by the findings of the supply and demand analysis. The proposed developments will enhance the appeal of the experiences offered by each attraction.

The following developments for the Hole in the Wall site are envisioned:

- Access track/walkways
- Boardwalks, security, and an access-control boom gate
- First aid station and access control with patrol personnel and rangers
- Picnic spots and associated facilities
- Boat launching sites
- Public infrastructure, e.g. ablution facilities
- Lifeguard facilities with an all-weather shelter
- Rehabilitation of the surrounding environment
- Adequate signage, e.g. for leisure and recreational activities
- Infrastructure safety plan for interactive signage and live showcase stands along the boardwalk to inform visitors about features of the area

This development will significantly improve the region, increase the number of visitors and contribute on a socioeconomic level through job creation and opening up opportunities for tourism development along the coastline.

New Regional Tourism Route Developments in the Eastern Cape:

Kouga Agri-Tourism Route (Launched September 2021)¹⁵:



The Route brings both sectors of Agriculture and Tourism together and allows both to reap the advantage of both learning and exploring. It includes Khoi Cultural Tours that allow visitors to experience the Khoi Culture directly from the Khoi that still live traditionally in the Gamtoos Valley area. This includes traditional Khoi food tasting, dances, viewing of rock paintings, visits to an authentic Khoi “Kraal” and some fascinating facts and the history of Sara Baartman. The Route also allows visitors a variety of activities that includes:

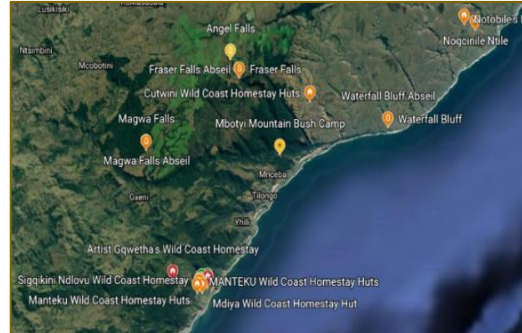
- Honey Tasting and Beehive Visits at Pabala
- Pick Strawberries at Mooihoek
- Citrus Packhouse Tours at Entabeni Farms
- Khoi Cultural Tours

¹⁵ Nelson Mandela Bay Tourism. Official Website. Available at:
https://www.nmbt.co.za/news/kouga_agri_tourism_route_launch.html

Wild Coast Waterfalls Adventure Route (In progress)¹⁶:

Running between the Great Kei River in the south and The Umtamvuna River in the North- the route will connect the villages and the families that live in them to the benefits of mainstream tourism. This is a partnership between the Hotels, the villages offering Wild Coast Homestay Huts, and the local Wild Coast Guides.

All packages will include the services of an experienced local guide, accommodation, meals, ferry transport, nature reserve entrance fees, and shuttle services. Other adventure activities include abseiling the waterfalls; paddling the rivers, lagoons, and coastline; and even a helicopter flip.



Recommendations

- Route development in the province is quite fragmented, especially when it comes to communication and coordination at district and local levels.
- The province should consider adopting an approved list of tourism routes and develop a framework with specific criteria for route development.
- Route marketing remains a challenge as it needs an integrated marketing approach driven by ECPTA and the relevant district and local tourism organisations. Route development should align with the provincial marketing brand and its values and objectives.
- Audit the viability of products before they are packaged as part of tourism routes.
- Prioritise the training of tourism route officials.
- Tourism routes need careful layout and planning and should reflect the authenticity and uniqueness of the regions or neighbourhoods they connect.
- To determine the viability of a proposed route, service providers should be appointed to conduct feasibility studies.
- ECPTA's Destination Development Team needs to be engaged in route development as they can assist and support.
- Stakeholders raised concerns regarding the marketing of the Friendly N6 region. The region is called the Eastern Cape Highlands. However, it is being marketed as the Friendly N6, a name that derives from the N6 route which runs between Bloemfontein and East London. This causes uncertainty among tourism operators as they feel unsure of how to market themselves correctly. The result is that certain attractions are not being promoted. This matter requires urgent attention to provide clarity and a way forward.

Responsible Tourism Development

Products must align with tourism development values in the Eastern Cape, including beliefs about sustaining the environment and the culture. It is also important to note that tourism (and, by implication, tourism product development) is multi-sectoral. Therefore, there needs to be consistency in services provided by other sectors, for example, transport. In the South African context, Responsible tourism implies¹⁷:

- The tourism sector's responsibility to the environment, through the promotion of balanced and sustainable tourism, and a focus on environmentally based tourism activities

¹⁶ Wild Coast South Africa Facebook Page. Available at:

(https://mobile.facebook.com/wildcoastsouthafrica/photos/a.473783686052899/4141018182662746/?type=3&_rdc=1&_rdr)

¹⁷ National Department of Tourism Knowledge Portal. Available at: <https://tkp.tourism.gov.za/rt/what/Pages/default.aspx>

- The responsibility of government and business is to involve the local communities that are near tourism infrastructure and attractions, through the development of meaningful economic linkages
- The responsibility of tourists, businesses, and the government to respect, invest and develop local cultures, and protect them from over-commercialization and over-exploitation
- The responsibility of local communities to become actively involved in the tourism industry, practice sustainable development, and ensure the safety and security of visitors
- The responsibility of both employers and employees in the tourism industry, both to each other and the customer (responsible trade union and employment practices); and
- A responsible government as well as a responsibility on the part of tourists to observe the norms and practices of South Africa.

Skills Development

- Skills development in tourism is essential for the sustainability of the sector. Continuous skills development throughout all spheres of industries should be encouraged through regulatory documentation. The intangible nature of certain aspects of tourism in the Eastern Cape – traditional beliefs, for instance – requires competent guides who can deliver a high-quality service to tourists. Provincial stakeholders have identified the following training needs- Training in marketing for LTO and DMO officials.
- Local products need skills development in the following categories: digital marketing, effective product packaging, and costing of offerings.

The Department of Tourism (NDT) is offering new Learnerships and Youth Skills Development Programmes (Food and Beverage Management, Chefs Training, Wine Service Training) in the Eastern-, Northern- and Western Cape.

Tourist Guiding Services

The main role of a tourist guide is to serve as an ambassador or representative in the field they qualified for and in which they specialise. It is the responsibility of the tourist guide to make the visitor experience of tourists convenient and informative while providing them with tourism information and helping them access the relevant destination. Guides also assist visitors in understanding the culture of the region and the way that the inhabitants pursue their day-to-day lives.

The guide has the role of promoting the culture and heritage of a destination while being sure to inform visitors about the value of these features. Their role also includes providing visitors with adequate information on the features and history of the relevant location. Furthermore, guides need to communicate their local knowledge to tourists. In general, a guide assists the visitor in having a satisfactory tourism experience by familiarising them with the culture, language, and specialities of a tourism destination as well as possible weather conditions at this location. The following should be noted for addressing concerns associated with guiding services:

- Access to guiding opportunities, training, and accreditation needs to be revisited.
- Train local members of the communities to become guides for international or domestic hikers. This leverages the local knowledge that the communities have and creates job opportunities and safety for tourists.
- To address the competency of the profession, training of guides needs to take place. Training is also required to ensure continued professional development.
- Awareness creation of these services in the province.

- The sector should work together with tour guide associations to understand what their challenges are and how municipalities can assist with funding.
- Engage with relevant organisations to address challenges experienced by guides in the Eastern Cape, e.g. the Culture, Art, Tourism, Hospitality, and Sport Sector Education and Training Authority and the National Federation of Tourist Guides and Affiliates South Africa.
- Numerous opportunities exist for guides in the adventure sector. Guides should participate in activation programmes that expose them to a wide variety of activities in the province.
- Guides are experiencing challenges as they are not getting their certificates and getting trained by unreliable companies.
- Tourist guides need to be integrated with the whole sector to gain visibility and have a voice that can be heard by other players
- The issue of illegal tourist guiding in the province needs to be analysed and given priority.
- Train guides to capture and upload Google Maps Street View content (this is an example of an innovative micro-industry initiative with unlimited possibility).
- Provide continuous training for tourist guides on relevant sector matters to update their knowledge on trends, market needs, etc.
- For guide training and accreditation, engage with bodies like the South African Adventure Industry Association to develop programmes for tourist guides.

Although attempts are made to train and register guides to equip them for their tasks, the province still experiences illegal tourist guiding activities. Other provinces have worked with SAPS to address this problem by scheduling inspections at attractions where illegal guiding was prevalent. Incorrect and outdated databases are also contributing to the issue.

MICE Industry

Meetings, incentives, conferences, and events are essential drawcards for tourists to the Eastern Cape. Business tourism increases tourist arrivals and provides opportunities to promote tourism activities to business travellers. Effective promotions may persuade these visitors to increase their length of stay. Furthermore, by focusing on the MICE industry in the province, more tourists will be attracted to the area before and after the events have been hosted.

The MICE industry can assist in alleviating the negative impacts of tourism seasonality. Where possible, events should be scheduled for the off-peak season to ensure that facilities are utilised throughout the year. Exploring and developing the Eastern Cape's potential to host more annual events will ensure the different regions stay relevant and retain an active presence on annual events calendars.

The province should investigate business tourism potential in the different districts and how this can be leveraged. Many business travellers partake in tourist activities such as shopping, eating out, sightseeing, and visiting friends or family. Also, business tourists sometimes bring their family or spouse with them, leading to "bleisure" tourism.

Community Involvement

Tourism has been identified as a tool to enhance the livelihood of local people. Therefore, the involvement of local communities in tourism initiatives is strongly advocated for the Eastern Cape's tourism sector. The overall success rate of such initiatives is much greater if communities are involved in and benefitting from tourism in the area. The support of the locals is paramount to identifying, implementing, and managing any form of tourism in the area. It is essential to find out how the residents are already using the area and how they wish to use it in the future.

The tourism White Paper of 1996 recommends that communities should, inter alia:

- Organise themselves to interact with government at all levels and have a representative voice in tourism structures, and
- maximise the sharing of information and experiences, possibly facilitated through financial assistance by local government
- Identify potential tourism resources and attractions within their communities
- Exploit opportunities for tourism training and awareness, finance, and incentives for tourism development
- Seek partnership opportunities with the established tourism private sector
- Participate in all aspects of tourism, including being tourists
- Actively participate in, support, and promote responsible tourism and sustainable development
- Oppose developments that are harmful to the local environment and culture of the community
- Participate in decision-making for major tourism developments planned or proposed for the area

Positive outcomes in this regard include building industry cohesion, collaboration, and advocacy across the various districts. These actions also demonstrate the value of tourism, putting structures and resources in place to promote investment in new infrastructure and new products and improve regional access. Nevertheless, tourism stakeholders must provide encouragement and support when it comes to community participation in tourism. Stakeholders, investors, and government should be well-coordinated and consistent in prioritising community involvement that can be enriched through access to streamlined opportunities and partnership prospects.

Currently, many local communities in the Eastern Cape are not empowered by tourism activities. These groups need to receive direct benefits from tourism for it to be sustainable over the long term.

Product Packaging

Effective product packaging entails knowledge of how to package tourism products, the different types of tourism packages, the types of tourists who purchase packages, how to develop strategic partnerships with other tourism service providers, and how to price these packages. Thanks to the Eastern Cape's scenic landscapes and varied tourism products, many opportunities exist to diversify its tourism offerings through product packaging initiatives.

This should not be the sole responsibility of the DMOs. Tourism operators need to seek opportunities in this regard and develop the necessary partnerships to promote their offerings.

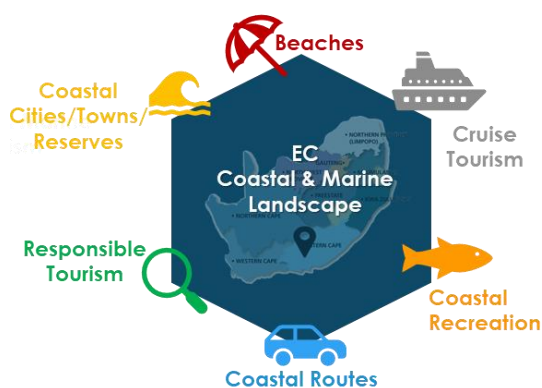
5.3.4 Product Diversification

Product diversification will seek to support initiatives that encourage the development of new and enhancement of existing tourism events, experiences, and programmes. These products will also add value to enhancing the overall tourism experience of the destination and contribute to its competitive positioning and destination branding identity as well as increased rural linkages.

Coastal and Marine Tourism

Coastal and marine tourism is an important sub-sector of the tourism industry and is regarded as the form of tourism that has the highest demand and concomitant impacts, especially in the context of reliance on sensitive natural resources. Recreational activities such as visiting beaches, surfing, swimming, and fishing are key tourism pursuits in coastal locations¹⁸.

¹⁸ Biggs, D., Hicks, C.C., Cinner, J.E. & Hall, C.M. 2015. Marine tourism in the face of global change



Beaches have always attracted people for several recreational activities. These can be divided into water- and land-based activities. Land-based activities range from active recreational pursuits such as fishing, ball sports (beach volleyball, for example), walking, jogging, exploring, and metal detecting to passive leisure activities such as sunbathing, sightseeing, and socialising. Water-based sports include swimming, surfing, windsurfing, kite surfing, jet skiing, water skiing, snorkelling, skin diving, scuba diving, kayaking, and boating. The beach is, therefore, a meeting point for both tourists and local residents,

covering many different interests¹⁹. The Eastern Cape coastline extends for more than 800 km, is a mecca to all water sports enthusiasts, and has a popular and thriving surfing culture²⁰. Popular surfing spots include Jeffreys Bay, Cape St Francis, and Nahoon Beach in East London.

Annual Sardine Run

This seasonal movement of sardines, dolphins, sharks, seabirds and even whales along the Eastern Cape coastline attracts tourists, marine biologists, wildlife photographers and filmmakers across the world. Charter-and-dive companies develop special packages for tourists to experience this phenomenon. Opportunities exist for business owners to leverage on this event through innovative product packaging.



Cruise Tourism

As a coastal province, the Eastern Cape is strategically positioned to benefit from cruise tourism. A strategy should be developed specifically for this category of tourism. It should include cruise tourism excursion packages and identify development potential where applicable (e.g. value chain opportunities for transformation). One of the biggest challenges is that cruise ships do not dock long enough for tourists to undertake excursions that include all relevant activities. If cruise lines scheduled stopovers of at least two days, various packages could be developed that would treat tourists with diverse experiences. Such packages might include strong heritage and cultural elements such as museum visits and travel along themed routes. Cultural experiences can introduce tourists to the local culture, allowing them to meet interesting personalities and see what local performers and artists have to offer, e.g. street art. Currently, the province is not fully exploiting cruise tourism opportunities.

Agritourism

The province has notable potential for agri-tourism which can be used as a major tourist and investment attraction. These products need to be packaged and promoted in such a way that they increase both the agricultural and tourism potential of the province through increasing employment opportunities. An agri-tourism development programme needs to be established in line with the feasibility assessments that have been undertaken. Support for such an initiative is critical as there will be a need to roll out the programme to the entire province. Agri-tourism can be used as a tool to promote both equitable distributions of tourism benefits and rural development.

¹⁹ Eastern Cape Coastal and Marine Tourism Strategy 2016-2020

²⁰ SA Venues Website. Available at: <https://www.sa-venues.com/attractionsec/eastern-cape-beaches.php>

Eco-Tourism

The Eastern Cape boasts its fair share of conservation-related and eco-tourism activities on offer for visitors. The village of Storms River in Tsitsikamma, Storms River Adventures was one of the pioneers in the field of eco-tourism. The company became one of the first in South Africa to function under the principles of Fair Trade tourism and throughout the province, over the years, it has inspired others to also focus on long-term sustainability, fixing the imbalances from the past, recycling and preserving the environment²¹.



Wildlife Ranching

The biodiversity in the Eastern Cape provides an excellent resource base for sustainable economic development, especially in impoverished rural communities²². The scenic beauty of the province provides valuable products for the tourism and wildlife industry, with the potential to generate considerable revenue from nature reserves, game farms, and hunting lodges.

Malaria-free Eastern Cape offers high-quality hunting experiences, with over forty species of game spread across large tracts of land spanning semi-arid desert, dense coastal forests, mountains, and open savannah. The wildlife industry employs many people across the province and contributes significantly to the socio-economic status of the Eastern Cape in this regard. Game ranches cover approximately six million hectares and generate over 45 000 jobs in the province²³.

Challenges that are experienced in this space relate to the poor condition of access roads for transporting wildlife, travelling with hunters, and tourist visits to game lodges. Attention must be given to reducing red tape in the regulatory environment, which requires permits and approvals for transporting game, buying and selling wildlife, and other activities. Awareness creation and perception management should be implemented. The tourism sector (and society at large) need to be aware of the wildlife industry and how it operates as well as how it contributes to conservation. There are many negative perceptions about the hunting industry, and its positive impacts are generally overlooked. Animal rights groups are creating obstacles for the hunting industry even though the accounts they give of this industry are, in certain instances, inaccurate and not a fair reflection of the situation on the ground.

Value of Hunting

Hunting tourism is a major contributor to the economy and is valued at over R6bn per annum. The hunting industry creates jobs and supports small business and enterprise development. It provides economic opportunities for communities who have benefited from land restitution and facilitates the entry of previously disadvantaged communities into the wildlife economy; thereby supporting government's wider economic transformation objectives. The transformation of the wildlife sector is a national priority of the South African government, in line with its commitment to land ownership transformation and the development of rural communities.

-President Cyril Ramaphosa-January 2021

²¹ ECTOUR. 2020. Eco Tourism in the Eastern Cape. Available at: <https://www.ectour.org.za/news/eco-tourism-in-the-eastern-cape>

²² Eastern Cape Biodiversity Conservation Plan 2018

²³ Wildlife Ranching South Africa (WRSA- Eastern Cape)

Culinary Tourism

Also known as cuisine or food tourism, this involves experiencing local cuisine at a destination where there is also learning and a mutual understanding between visitors and local community members. The province boasts a variety of cultures and accompanying culinary expertise to dish up authentic African dishes to keen visitors. There is an opportunity to improve the visitor experience through enhanced food and beverage offerings. The local culinary scene of the province provides a way to connect visitors to food stories, traditions, and tastes.



Film Tourism

The filming of 'Survivor South Africa' along the Wild Coast in 2021 resulted in job creation and upskilling and provided a much-needed financial boost to the region. The project also reinvigorated the Wild Coast brand. The ECDC investment of R2 million towards the production of 'Survivor South Africa: Immunity Island', the eighth season of 'Survivor South Africa', resulted in an economic impact of more than R10 million. Of the 103 jobs created by the production, 55 were taken by women and 60 by local youth."²⁴ The experience of filming the programme in the Eastern Cape highlighted the potential and impact of the film industry and how it can be applied to encourage tourism demand.

Business Tourism

The Eastern Cape has once again been selected to host Survivor SA. The ninth season, titled "Return of the Outcasts", will be filmed in the province's Sunshine Coast. The EC can look forward to enjoying the exposure it will receive through the show as well as the added economic benefits.

Business tourism is key to addressing seasonality in the tourism market. Given that international business tourists also bring greater economic benefits than any other types of tourists (as a result of their high daily spending), these travellers should be targeted for tourism promotions. Opportunities for persuading business travellers to extend their trips to include tourism activities include²⁵:



1. Extended hotel access: Extended hotel room access can encourage business travellers to extend their stay before or after their business meetings.

2. Enhance tourism infrastructure for business conventions: Cities are increasingly looking for ways to enhance their attractiveness as convention destinations.

3. Business services for tourist 'resorts': Upscale resorts opening around the world, as well as hotel properties

being converted to conference resorts, are blending resort spa facilities with full-service business amenities.

4. Diversify tourism packages for conventions: International trade shows and conferences attract hundreds to thousands of delegates, often from many countries. Tourism and convention planners

²⁴ Multichoice. June 2021. First-Ever local production of Survivor South Africa Boosts Wild Coast Economy by over R10 million.

²⁵ International Trade Forum. 2019. Business Tourism- Niches for Developing Countries. Available at: <https://www.tradeforum.org/business-tourism/>

often include tourism add-ons for delegates. These events may include city tours, golf, and sightseeing as a regular part of their programmes.

5. Competitive Trends- Accompanying families: A growing number of business travellers bring families on business trips. This creates an opportunity to work with hotels and convention centres to develop new offerings for children and spouses during business meetings.

The East London International Convention Centre (ELICC) has placed East London and the Buffalo City region on a firm footing as a regionally competitive conference and incentives destination.

Rural/Township Tourism

This form of tourism is important as it²⁶:

- helps boost the economy of culture-dense areas and communities.
- helps strengthen and grow the social impact in an area or community.
- establishes as well as reaffirms and reinforces the identity of the place and the people who live there.
- promotes and builds a positive image of the place, the culture, and its people.
- helps to preserve and protect the cultural and historical heritage of a place.
- fosters harmony and understanding among people with culture being the instrument to facilitate it.

Challenges for rural tourism development include the following:

- Government business support services are far from the townships.
- There is a lack of operating facilities/spaces/land within the township.
- There is a lack of markets/market access and information to sell products.
- Many of the township entrepreneurs do not have the skills to run their businesses efficiently (both soft and technical skills).
- Other problems are related to the provision of municipal and government services such as water, sanitation, and electricity.
- Partnerships between the government and private sector are important for developing anchor township tourism products.

Homestay- and Village Experiences

The province's rural areas provide visitors with an authentic experience through various homestay options. Village experiences invite visitors to immerse themselves in the traditional ways of village culture and to enjoy the activities offered in the surrounding area. Visits include shebeens, local restaurants, and clubs, giving you a true view of rural communities in the Eastern Cape²⁷.

²⁶ News 24. 2018 Youth Summit 2018: Township tourism and the value of our roots. Available at: <https://www.news24.com/News24/youth-summit-2018-township-tourism-and-the-value-of-our-roots-20180712>

²⁷ Visit Eastern Cape Official Website. Village Experiences. Available at: <https://visiteasterncape.co.za/things-to-do/attractions-activities/village-experiences/>

Homestays offer ample opportunities to grow and transform the tourism sector through community involvement and empowering women and youth. Other opportunities include the inclusion of products in route development and local cultural experiences as well as the employment of locals as tourist guides. Support is needed to establish these homestays, and such initiatives have already been adopted along the Wild Coast through the Wild Coast Holiday Association, a tourismZA initiative.

Township tourism potential has been identified for the following townships:

Lingelihle (Cradock), Umasizakhe (Graaff-Reinet), Walmer (Gqeberha), Mdantsane & Duncan Village (Buffalo City), Nkululeko Township (Barkly East)

Heritage and Cultural Focus

Due to the rapid growth of tourism in developing countries, a vast number of opportunities exist for the development of tourism niche areas. One such niche category is heritage and cultural tourism. This form of tourism is focused on making “the most of the country’s natural and cultural resources”²⁸ and therefore encourages sustainability and responsible tourism.

The Eastern Cape boasts numerous attractions that support heritage and cultural tourism. This form of tourism provides an opportunity for cultural exchange, learning, and mutual understanding between visitors and local community members. Heritage tourism focuses on both tangible and intangible elements of culture. Intangible elements refer to the non-material aspects of heritage and culture such as language, religious practices, music, and oral histories that are important to people in helping to establish their identity and sense of community in the world”. They also include memory, people’s sense of attachment, and emotional engagement with a place.

Some of the main cultural features of the province include²⁹:

- Xhosa traditional heritage
- The Victorian-style built landscape of Karoo villages
- The presence of the Nagoon footprints and Rock Art of the Khoisan
- Graves and battle sites
- Mvezo: The birthplace and home village of Nelson Mandela and the Museum
- A variety of museums

In addition to important economic benefits, this form of tourism development will allow locals to share their heritage with the world. Positive outcomes include promoting greater understanding and appreciation of the Eastern Cape’s history and people, forging links, promoting understanding, and encouraging respect for the district’s natural and cultural environment.

Sport Tourism

Tourism and sports are interrelated and complementary. Sports – as a professional, amateur, or leisure activity – involves a considerable amount of traveling to play and compete in different destinations and countries. Major sporting events, such as the Olympic Games, football and rugby championships have become powerful tourism attractions in themselves – making a very positive contribution to the tourism image of the host destination. The province is home to the Eastern Cape Warriors cricket, Chippa United F.C. and the EP Kings rugby team, the Nelson Mandela Bay Stadium, Buffalo Park and St Georges cricket ground sets the stage for a variety of provisional and international

²⁸ Kavita, E. et al (2017:2)

²⁹ Eastern Cape Tourism Master Plan 2009-2014

sporting events that take place throughout the year³⁰ and that can be leveraged to attract more tourists to the different regions.

Objectives to further develop this form of tourism into a tourism product includes stimulating the local economy (direct spending related to the use of sports facilities and services; visitors' and public spending for goods and services; employment opportunities, and tax revenue; and providing outstanding entertainment as part and parcel of the sporting experience. Potential opportunities in this sphere may include:



- International sporting events in South Africa facilitate numerous opportunities in host cities i.e., Gqeberha and East London (such as the FIFA World Cup in 2010)
- Canoe marathons, ultra-marathons, mountain biking, and other national sporting and cultural events, facilitate opportunities to promote the attractions of smaller towns in the regions.
- Leveraging conventional sport events and activities to create a visitor experience and extend LOS
- Getting schools involved in sport programmes/activities
- Developing sporting venues to be multi-faceted, to diversify offerings.
- Effectively market trail runs (and other physical competitions such as Iron man/Warrior Race etc.) and mountain biking venues and events that take place across the province or regions/venues that have the potential to host such events.

5.3.5 Recommendations for Product Development

- Identify tourism opportunities within the different niche categories that are relevant and viable for development.
- Develop a gap analysis for investment opportunities in the province.
- Investigate creative industries development. Engage with the provincial Department of Sport, Recreation, Arts and Culture as it is a key stakeholder in this regard.
- Community tourism and involvement need to be prioritised. Engage in community tourism forums. These organisations are under-resourced, lacking even the funds to make phone calls.
- Training in product packaging is needed. Workshops should be hosted that address questions on this issue: Who should package a tourism product? How do you do it? How do you price it?
- Ensure that conference facilities have reliable image, sound, and video systems (dual screens, high-speed internet connections, etc.) so that the venues meet the requirements for hosting meetings.
- Tourism products should be diversified to include those of a cultural and heritage nature that can attract tourists to the more rural areas of the province, thereby increasing the geographic spread of the benefits of the tourism sector.
- Tourism operators need to be educated in the pricing, packaging, and marketing of their products.
- Identify regions where street markets can be developed to diversify offerings while showcasing local arts and crafts.
- Develop heritage and cultural tours by linking offerings that have similar themes.
- Explore public-private partnership opportunities within the different regions to drive sector transformation.
- Equip business owners with the basic computer skills that they need to operate more effectively.
- Township tourism development needs to be implemented in a very deliberate and realistic way, with steps completed before products are established.

³⁰ ECPTA Official Website.

- Involve local communities and previously neglected groups in the tourism sector by establishing partnership ventures with communities, outsourcing, and the purchase of goods and services from communities (e.g. poultry, herbs, vegetables and other agricultural supplies, entertainment, laundry services, etc.).
- Partner with communities to showcase histories and traditions by using documentaries and homestays.
- Develop sporting venues to be multi-faceted to diversify offerings.
- Get prominent sport figures/teams involved in advertising campaigns / roadshows / competitions.
- Focus on youth sporting events.

5.4 Visitor Experience

5.4.1 Introduction

Visitor experience plays a very important role. It is affected by the destination attributes, the quality of the products and services, and the variety and scope of attractions and activities. Visitor experience also impacts repeat visitation rates. Repeat visits are beneficial to the province as they generate more income. It is also more affordable to maintain regular visitors than to spend more on marketing strategies to attract new tourists. The Eastern Cape should thus aim to meet the tourist's expectations and needs.

With the focus on optimising visitor experiences and understanding that infrastructure and amenities affect this, there is an ongoing need to support the upgrading of local towns. All infrastructure, facilities, and public domains should be kept in optimal condition, and operational processes at ground level should be driven by upholding product and service quality standards.

5.4.2 Main Challenges

The following main challenges applicable to the visitor experience have been identified for the province:

- Beaches are not being maintained effectively. They are unsafe, strewn with litter, and ablution facilities are not in working order.
- Tourist safety is a major problem at certain sites (e.g. criminal intent towards tourists on the Wild Coast)
- Tourists are not presented with a clean, safe, and aesthetically pleasing environment. Public spaces are not well maintained and are in many cases an eyesore.

5.4.3 Key Considerations

Creating Experiences

The "tourism experience" is a critical concept in tourism marketing and management. Every destination, location, and site has a specific atmosphere and appearance associated with it; the location comprises certain facets that make it unique and worthy of visiting. These facets usually constitute the pull factor in terms of tourism. The "spirit of a place" is also linked to the identity of the local people as this forms part of the character of the landscape. The Eastern Cape should aim to develop and retain this sense of place to provide lasting experiences for its visitors.

Tourism is, therefore, not only based on the place and the products as individual components but rather the destination experience as a whole. The experience is influenced by a combination of the following elements:

Figure 16: Tourism Product Categories

Type	Indicators
Physical	Infrastructure, natural resources, accommodation, landscapes
Experiential	Festivals, activities, community interactions, events, dining and entertainment, shopping, safety, service
Emotional	Human engagement, cultural and historic resources, hospitality, general interactions

Where all three of these elements successfully overlap, a memorable tourist experience is created. Tourism trends also point to a desire for more engaged and interactive travelling experiences. Tourists are seeking engagement with tourism destinations and cultures that have an authentic story to share and are also looking for closer community interaction.

Aesthetic Appeal

Tourists want to be in attractive environments and to look at attractive things. The aesthetic value of a destination is of utmost importance. The development of visually attractive products and physical settings can aid in the creation of brand differentiation and influence the purchasing behaviour of consumers³¹. Stakeholder engagements have identified that the province's tourism landscape needs intervention when it comes to the state of tourism infrastructure, public spaces and facilities, gardens and other natural areas, and cleanliness in general.

Tourism Grading

To promote accommodation within the tourism sector, it is beneficial for accommodation establishments to be graded. Grading status, which is obtained from the Tourism Grading Council of South Africa, paves the way to receiving more visitors as people prefer to make use of graded accommodation. The grading guarantees, to some extent, a high-quality product and experience for the visitor. The grade awarded to the establishment provides tourists with an indication of what sort of facilities and service they can expect. In the Eastern Cape, 49% of all accommodation establishments are graded. Destination management should encourage accommodation product owners to get their properties graded and, if necessary, to seek assistance with the grading process. Grading involves benefits relating to procurement, recruitment, legal advice, access to information, training, and marketing.³²

5.4.4 Recommendations for Visitor Satisfaction

- Develop a victim support programme for tourists that outlines the steps they should take when reporting an incident and the kinds of support that should be offered to them.
- Be proactive: report back on incidents that occurred and how they were resolved. Tourists need to know that such matters are being dealt with by the relevant authorities.
- Work with tourist guides and local communities to address issues of crime.
- Maintenance of heritage and cultural sites is required as some are unkempt and overgrown, something that creates unsafe conditions for tourists.
- Safety measures in coastal regions and at beaches are vital. Have security checks, create a safe environment and employ dedicated lifeguards who take their duties seriously. Tourists will accept visible policing and interpret it as destination managers showing that they care about the visitor experience.

³¹ Weaver, Adam. (2009). Tourism and aesthetic design: Enchantment, style and commerce. *Journal of Tourism and Cultural Change*. 7. 179-189

³² Tourism Grading Council of South Africa

- To improve the visitor experience, operators should consider introducing virtual experiences as part of their offerings. They could experiment with 4D technology in this regard to create a cultural interface.
- Product (and destination) website designs should be interactive and able to guide visitors to their specific interests.
- Tourism grading needs to make provision for Wild Coast homestay huts. Systems and standards need to be set for the grading and assessment of these huts.
- Market segmentation should be used to guide tourism offerings and marketing, and to develop offerings and packages appropriate to the interests of visitors.
- Allow experience supply gaps and opportunities to inform product development priorities and initiatives in collaboration with tourism organisations, stakeholder networks, and partners.

Maintaining Service Excellence Standards

Challenges relating to service excellence include observations where establishments operating within the four- and- five star grading categories (that charge a premium price), are no longer offering the associated premium service. Still recovering from the impacts of Covid- many businesses now operate with fewer staff members, have cut back on their menu selections, and have not kept up with routine maintenance etc. Considering that they are still charging a high price and not delivering equal quality services, is not only negatively impacting the accommodation sector, but also the Eastern Cape brand. The TGCSA should reassess such effects on grading status in general and the ECPTA should consider hosting workshops to raise awareness and help manage expectations.



5.5 Transformation

5.5.1 Introduction

The National Transformation Strategy for the Tourism Sector (2018) sheds light on issues that need to be addressed within the tourism sector. These relate to ownership, management control, skills development, enterprise and supplier development, socio-economic development, and stakeholder partnership and collaboration problems. The strategy further states that addressing these problems is critical in facilitating industry-wide processes to catalyse transformation in the sector. It is also central to mapping out a comprehensive set of actions for transforming the sector beyond simple compliance with broad-based black economic empowerment (B-BBEE) codes. The NTSS maintains that the transformation of the sector must be accelerated in a way that supports growth through the expansion of opportunities for new market development and access to resources. It asserts that transformation is critical for social stability, the reduction of inequality and poverty, and inclusive growth.

To ensure that the Eastern Cape increases its competitive advantage in the tourism sector, stakeholders need to use the current strengths of the province to create new opportunities and deal with weaknesses. The slow pace of transformation in the tourism sector remains a concern. Challenges include the sector's inability to successfully facilitate the inclusion of previously disadvantaged black people in tourism activities. This could be addressed by collaboration and seeking opportunities that hold out the possibility of meaningful participation by black people, especially women and young entrepreneurs³³.

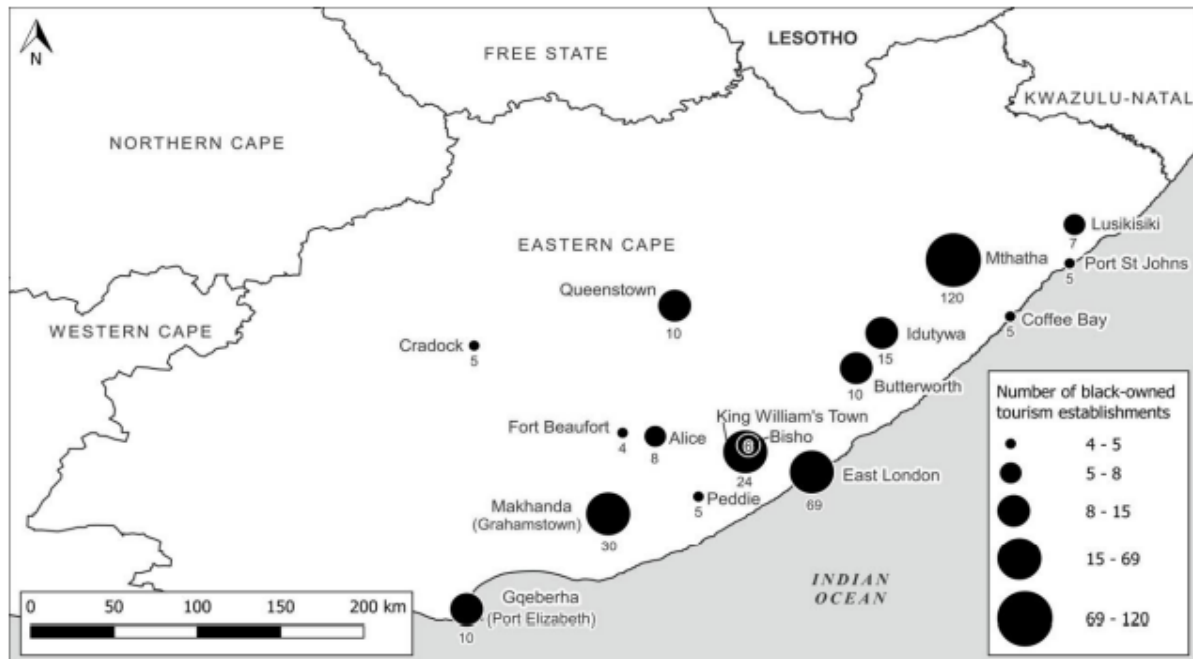
³³ Transformation Strategy for the Tourism Sector 2018.

5.5.2 Tourism Transformation in the Eastern Cape (Accommodation Industry)

In terms of tourism transformation in the accommodation industry, the figure below shows a mapping of the landscape of black-owned tourism accommodation establishments as an indicator of transformation. In total 333 or 22.8% of accommodation establishments could be identified as black-owned. The spatial distribution of these establishments shows that the largest clusters are in Mthatha (36%) followed by East London (20.7%), Grahamstown (9%), and Qonce (9%).

The most striking finding is the very low number of black-owned accommodation establishments which were recorded for Gqeberha. This is a signal of the difficulties of Black-owned small enterprises to penetrate the tourism market of Eastern Province's largest city³⁴.

Figure 17: The Geography of Black-Owned Accommodation Services in Eastern Cape



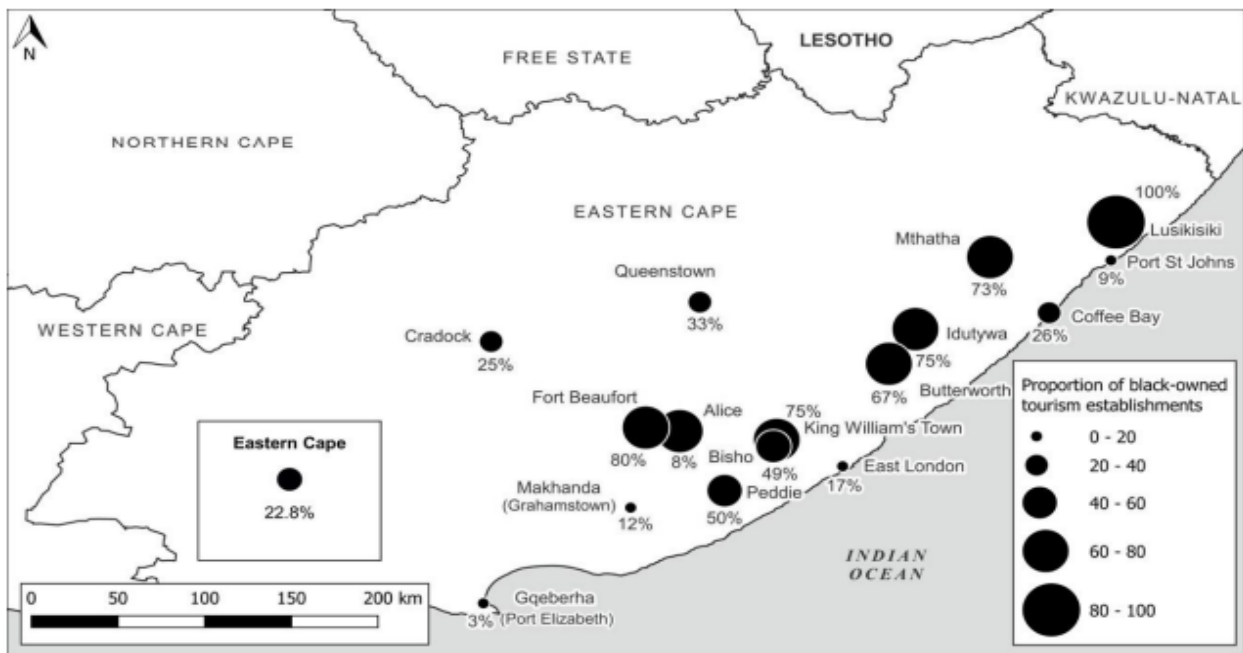
Source: Rogerson, C.M. & Sixaba, Z. (2021)³⁵.

The figure below outlines what can be called the 'transformation spaces' of the Eastern Cape. It maps the share of black-owned tourism accommodation service establishments as a proportion of all accommodation services. The findings confirm the stamp of apartheid on tourism and spatial development in the province. The lowest levels of transformation are recorded in the earliest established tourism nodes of the Eastern Cape, namely the cities of Gqeberha and East London, the small towns of Makhandha (Grahamstown), and Port St Johns. All these centres record a proportion of Black-owned enterprises which is less than that for the Eastern Cape as a whole (22.8%)³⁶.

^{34&22} Rogerson, C.M. & Sixaba, Z. (2021). Transformation in South African tourism: A geographical perspective on the Eastern Cape. *African Journal of Hospitality, Tourism and Leisure*, 10(5):1610-1629

³⁵ It has been pointed out by stakeholders that this study focused mainly on the periphery of the province and largely ignored the center of the province (from Komani inwards)- where many black-owned tourism businesses are operational in Sterkspruit, Khowa, Maclear, etc.

Figure 18: The Geography of Transformation in Accommodation Services in Eastern Cape



Source: Rogerson, C.M. & Sixaba, Z. (2021).

5.5.3 Main Challenges

The following main challenges applicable to tourism transformation have been identified for the province:

- Tourism transformation is not happening in the Eastern Cape.
- Poor integration and coordination of relevant programmes are among the main contributors to the lack of progress.
- Stakeholders are unsure of how transformation should be implemented at a local level.
- Corruption and mismanagement of funds in government.
- Uncoordinated interventions by different government agencies/departments that bear no fruit.
- Poor participation and involvement of minority groups in forums.
- A disconnect exists when talking about transformation. There is a lack of information as well as a general lack of understanding in this regard.
- There is a lack of collaboration when it comes to the transformation of the sector.

5.5.4 Key Considerations

Existing Support Programmes

Various government institutions and departments have established support programmes, funding opportunities, organisations, and interventions to contribute to the sustainable development of the tourism sector. The programmes listed below are intended to encourage entrepreneurial activities, assist in skills development, and job creation, and stimulate sector growth. Note that the programmes were established at a national level and may benefit tourism-related businesses nationwide (including in the Eastern Cape) depending on programme criteria.

Table 5: National Tourism Support Structures

Programme	Description
National Empowerment Fund (NEF)	The National Empowerment Fund was developed to promote broad-based black economic empowerment (B-BBEE). The purpose of the NEF is to anticipate what funding and investment will be required by SMMEs and previously disadvantaged individuals to enable them to establish their businesses. The fund seeks to enhance entrepreneurial activities.
Small Enterprise Development Agency (SEDA)	SEDA's objective is to support and promote the sustainable development of SMMEs nationwide. The agency ensures that entrepreneurs can build business partnerships by linking them with relevant role-players at a domestic and international level. Furthermore, SEDA implements programmes targeted at business development in areas identified by the government.
National Youth Development Agency (NYDA)	The agency provides financial support to businesses owned by South African youth in the form of business loans and microfinance grants. Non-monetary assistance includes mentorship programmes, voucher programmes, market linkages, entrepreneurship development programmes, youth cooperative development programmes, and other business support services.
Business Growth/Resilience Facility	The Business Growth/Resilience Facility was established during the Covid-19 pandemic to benefit qualifying SMMEs by providing adequate business support. It provides SMMEs with supply opportunities in response to challenges caused by the pandemic.
SMME Debt Relief Scheme	The scheme was developed to assist qualifying SMMEs with debt incurred as a result of the pandemic.
Culture, Art, Tourism, Hospitality, and Sport Sector Education and Training Authority (CATHSSETA)	CATHSSETA has a mandate to facilitate skills development within the designated sectors through the disbursements of grants. The grants are used to finance learning programmes and the monitoring of education and training as outlined in the National Skills Development Strategy. The main purpose of this authority is to be the leader in skills development within its diverse sectors.
South African Tourism Services Association (SATSA)	The purpose of the association is to provide international buyers with advice and information on tourism product partners in the South African inbound tourism sector while providing members with key services and benefits. Members are represented at appropriate levels with government and NGOs on issues impacting the inbound tourism industry.
Tourism Support Programme (TSP)	The TSP was established by the national government to provide reimbursable cash grants aimed at supporting the development of tourism enterprises that will stimulate job creation, increase the development of tourism enterprises and cultivate the geographical spread of tourism investment.

Programme	Description
Green Tourism Incentive Programme (GTIP)	The GTIP was launched by the national Department of Tourism to encourage private sector tourism enterprises to move towards the sustainable management of water and energy resources while adhering to responsible tourism practices. Through grant funding, this initiative assists the enterprises in reducing the costs of investing in energy- and water-efficient operations while increasing their competitiveness, profitability, and operational sustainability in the long term.
Tourism Enterprise Development and Support Programme (TEDSP)	The TEDSP supports the NTSS in its objective to ensure sustainable development and growth of tourism enterprises in a way that facilitates inclusive participation and job creation, and which contributes to the competitiveness of tourism destinations.
Small Enterprise Finance Development Agency (SEFA)	The agency was established to focus on the provision of financial support to approved SMMEs and cooperatives. SEFA fosters the establishment, development, and growth of SMMEs and cooperatives to contribute to poverty alleviation, job creation, and economic growth.
Women in Tourism (WiT)	The WiT initiative was established by the national Department of Tourism to drive and support the development and empowerment of women in the tourism sector of South Africa. The initiative aims to ensure that women are respected, recognised, represented, and rewarded in the sector.
Market Access Support Programme	The purpose of the Market Access Support Programme is to reduce the cost burden for small tourism enterprises to participate in selected international trade platforms and thereby improve their access to buyers in new and growing markets. Providing tourism SMMEs with exposure on such platforms is intended to unlock demand growth and allow market penetration.
Tourism Grading Support Programme	The purpose of the Tourism Grading Support Programme is to encourage wider participation in the tourism grading system and ensure consistent standards in the facilities and services provided by accommodation establishments. This initiative will contribute significantly to the service delivery excellence of the tourism sector.
Tourism Transformation Fund (TTF)	The TTF was established as a dedicated capital investment funding mechanism by the national Department of Tourism in collaboration with the NEF. It focuses on financial support for black investors and communities investing in capital projects within the tourism sector.
Social Responsibility Implementation Programme (SRIP)	The purpose of the SRIP is to alleviate poverty and create jobs through tourism development. It thus addresses the tourism development and growth objectives of the national Department of Tourism in a way that ensures contribution to job creation and community empowerment through appropriate training programmes.

Programme	Description
Tourism Relief Fund	The Tourism Relief Fund was established by the NDT to mitigate the negative impact of Covid-19 on the tourism sector. The intervention provides once-off capped grant assistance to SMMEs that will ensure sustainability during and after the worldwide pandemic.
Tourism Business Council of South Africa (TBCSA)	The TBCSA represents businesses in the travel and tourism sector. The purpose of the organisation is to unite and influence the diverse voices of the sector to contribute to a competitive, responsible, and inclusive tourism economy.
Public-Private Growth Initiative	The initiative was established by the government and private sector businesses to encourage engagements and build closer relationships between public and private sector organisations in which the alignment of plans and objectives of both sectors can be enhanced.
Fair Trade Tourism (FTT)	Fair Trade Tourism is a non-profit organisation that promotes the development of sustainable and responsible tourism in South Africa. It focuses on increasing awareness about responsible tourism amongst travellers, assisting tourism businesses to operate more sustainably and facilitating the FTT certification programme across Southern Africa.
Job Stimulus Fund	The Eastern Cape Development Corporation administers the Job Stimulus Fund on behalf of DEDEAT. The fund is intended to advance incentives to companies in distress to maintain existing jobs. The fund has been instrumental in saving jobs in numerous tourism businesses. ECDC also works with DEDEAT and the ECPTA to market local, provincial and national funds to the industry.

Wild Coast Tourism Equity Transformation Programme

WildCoastZA was formed as the inclusive entity to drive this initiative, and since its inception in March 2021, is setting an unprecedented benchmark in tourism transformation and development. With the support of the Wild Coast Holiday Association, WildCoastZA is creating an inclusive membership, one that is open to all sectors of the tourism industry; a membership that links the benefits of mainstream tourism directly to the villages of the Wild Coast. Through education, mentored skills transfer, sustainability, and environmental consideration. Tourism will become the key socio-economic driver for everyone that lives or has a vested interest in the region. The program's vision is the following:

“To unite our membership in a way that is inclusive and builds trust, positivity, and authenticity for the Wild Coast as a safe adventure and holiday destination and a reliable brand to the benefit of everyone on the Wild Coast. A Wild Coast Holiday Association that is an all-inclusive membership of like-minded role players who are focussed on creating a sustainable tourism platform that benefits everyone that has an interest in the Wild Coast.”

“Program methods include getting buy-in from all stakeholders and taking stock of current economic and human assets- to date, 26 Wild Coast Hotels have committed to participate – of which 12 funded their virtual tours, 14 Wild Coast Villages representing 29 Homestays have committed to participate – of which WildCoastZA has created 5 virtual tours.”

Tourism equity transformation is not about donations or handing over ownership of existing, successful enterprises to local guides and communities. Rather it is about a partnership where existing, successful enterprises partner with village communities; where, through a partnered process of mentored skills transfer, intellectual property is also shared.

Establishing a Transformation Platform

The Eastern Cape Tourism Transformation Forum (ECTTF)

The purpose of the forum is to facilitate the sustainable transformation of the tourism industry in the Eastern Cape.

Objectives:

- Advance B-BBEE objectives and advocate for issues of transformation.
- Provide a mechanism for information sharing / creating awareness and encouraging B-BBEE compliance.
- Optimise connectivity between government departments and offerings within the transformation space.
- Identify and remove barriers to participation in the tourism industry.
- Institutionalising and applying lessons learned from other provinces.
- Identify relevant initiatives to which the TTF can provide strategic input.
- Leverage current industry role players (institutional and private) towards advancing the transformation agenda for the province.

The committee of the ECTTF will comprise representatives of the following:

- ECPTA
- DEDEAT
- ECDC
- District/metro municipalities
- District tourism organisations (DTOs)
- LTOs (where there is no DTO)
- Tourism associations, including Women in Tourism

The duties of the forum will include empowering communities and entrepreneurs at a district and local level by enabling them to gain access to information on the available B-BBEE incentive schemes and financial support. It will also develop a B-BBEE implementation plan for how best to implement provincial plans and policies for transformation in the sector. In addition, the ECTTF will report on transformation plans.

Planning for rural development and transformation requires comprehensive processes, programming, and implementation management arrangements that consider the cross-cutting nature of rural development. Plans should infuse rural development perspectives and imperatives into economic development, infrastructure, education and training, health, arts, culture and so on. Integrated planning and coordination need to be ensured at several levels³⁷:

³⁷ Eastern Cape Vision 2030 Provincial Economic Development. Available at:
https://www.ecsecc.org/documentrepository/informationcentre/ec-vision-2030-planoctober-post-exco_14935.pdf

- At provincial level, where the macro strategy is set, where resources are allocated, where role-players are directed and coordinated, and where province-wide monitoring takes place.
- At a regional level, where sub-regional or district-wide strategy is coordinated.
- At a local level, where priorities are generated to inform strategy-setting and where development action occurs.

5.5.5 Recommendations for Sector Transformation,

- Determine the status of tourism transformation in the province to adjust transformation targets accordingly; develop a transformation strategy for the province along with relevant projects or programmes to assist the sector in reaching its transformation goals.
- Aim to achieve transformation that goes beyond compliance by seeking out and adopting innovations that will make a fundamental change in black participation and ownership.
- More guidance is needed in this space. Stakeholders are not sure how transformation should be achieved, what they should be doing, the programmes they should be implementing, etc.
- Develop strategies to change ownership.
- Conduct an audit on SMMEs to update the database to reflect the post-Covid status quo and determine business support needs.
- Develop a project that will enable the province, with the help of all stakeholders, to identify specific opportunities for tourism that will drive transformation. Each project should be unpacked to include the key stakeholders, site locations, and action steps that need to be taken.
- Supply channels for SMMEs need to be easy to understand and even easier to find and access.
- Any products or projects identified for tourism transformation need to be planned inclusively. The process of delivery also needs to be inclusive from inception to execution.
- Link/connect product owners and entrepreneurs to existing national/provincial incubation programmes. More awareness creation needs to be established in this regard.
- The province needs to focus on ownership and set realistic targets to improve transformation.
- Create more interactive and strategic planning platforms for tourism transformation in the Eastern Cape.
- Identify opportunities where support can be provided to tourist guides (e.g. create activities to train guides and create employment).

5.6 Marketing

5.6.1 Introduction

Marketing plays a key role in raising awareness for regional destinations, experiences, and attractions. To stay relevant, the Eastern Cape's marketing campaigns and awareness creation require ongoing resource application and investment. Attracting tourists depends solely on the capability of the destination to market itself broadly to the rest of the world by making use of distribution channels that will produce the best results for that specific product.

One of the most significant ways to promote a district is by making use of the latest advances in communication technology to reach target markets. Digital platforms are one of the most important communication channels for marketing, selling, and promoting regional destinations and tourism products. Growing engagement and conversation across key social media channels enable more effective marketing and brand positioning, along with awareness creation. Fundamentally, it is about adopting a digital mindset. Marketing management should therefore keep adopting new and innovative ways in which the destination can be presented and packaged to the rest of the world.

5.6.2 Main Challenges

The following main challenges applicable to marketing have been identified for the province:

- Seasonality challenges cause demand fluctuations in the province.
- Provincial branding is not on par with competitors (Wesgro, KwaZulu-Natal).
- The sector is not capitalising sufficiently on digitalisation and how it can be used to improve the tourism experience.
- The marketing descriptions of the destinations in the Eastern Cape are not adequate. They largely relate to location and positioning and do not entice the reader to come to the destination and explore its offerings.

5.6.3 Key Considerations

Digitalisation

Digital technologies have brought significant transformation to the tourism industry, revolutionising tourism enterprises, products and experiences, business ecosystems, and destinations. Digitalisation has also transformed the traditional roles of tourism producers and consumers, with new roles, relationships, business models, and competencies emerging. Over the long term, digital transformation can unlock innovation and ensure competitiveness³⁸.

Mobile devices account for more than half of all online time, but most internet users still use a combination of mobiles and computers to access the web. Therefore, digital marketing offers great opportunities for tourism organisations and suppliers to promote and sell their offers and establish long-lasting relationships with their customers³⁹.

Content Marketing

The general concept of content marketing is that the entire strategy uses media (pictures, videos, virtual tours and more) to connect with prospective visitors. It allows tourism organisations to implement the more creative and entertaining aspects of digital marketing. Visuals are a powerful tool, particularly in tourism marketing. Photos, videos, virtual tours, 360-degree views, and other immersive experiences allow tourists to imagine themselves in a certain destination and look forward to the opportunity to experience it in person⁴⁰.

5.6.4 Recommendations for Marketing

- Develop a provincial Tourism Marketing Strategy for the Eastern Cape and benchmark it against other destination marketing strategies such as those issued by the Western Cape and KwaZulu-Natal.
- Collaborate with stakeholders on tourism development in niche areas and promote these offerings to create a stronger awareness thereof.
- There is a need for a provincial bid fund to encourage better collaboration; the fund should be headed by a steering committee.
- Target business travellers by packaging pre-and post-conference itineraries.
- Leverage user/consumer-generated content by developing campaigns that invite user involvement.
- Make use of authentic ambassadors/influencers/sector champions who are passionate about the Eastern Cape.

³⁸ Dredge et al. 2018. Digitalisation in Tourism: In-depth Analysis of Challenges and Opportunities. Available at: https://clustercollaboration.eu/sites/default/files/news_attachment/report_tourism_digitalisation_2018.pdf

³⁹ Maurer C. (2021) Digital Marketing in Tourism. In: Xiang Z., Fuchs M., Gretzel U., Höpken W. (eds) Handbook of e-Tourism. Springer, Cham

⁴⁰ M16 Marketing.2022. Innovative Travel Marketing Strategies To Maximize ROI.

- Coordinate the events calendar to address challenges related to seasonality and the geographical spread of tourists in the province.
- Market the uniqueness of each region and its local experiences.
- Develop a unique #hashtag for marketing purposes to engage with followers and promote the province more effectively on social media. There can be a tag that pertains to developments at a provincial level (#EC) as well as other tags for the different regions. There needs to be consistency of usage in this regard from the national Department of Tourism to the local level.
- Explore the possibilities of virtual tourism marketing. Virtual tourism approaches have the potential to reignite the tourism sector and its people and help build a more sustainable economic model going forward⁴¹.
- Branding per region should be improved. Find the unique DNA and character of each region/town, avoid too much description, and provide marketing stories.
- Develop “brand stories” to position the different areas and towns and establish their uniqueness/character through promotional and marketing approaches.
- Marketing the MICE industry must be done using an inclusive strategy. The planning needs to include members of the industry.
- Focus on joint marketing/collaborative initiatives. Form stronger relationships with tour operators to ensure exposure.
- Provide training sessions on online advertising to product owners.
- Create and package affordable offerings for this market, i.e. value-for-money products, family and recreational products, etc.
- Implement cruise tourism marketing initiatives such as inflight information, and advertising onboard the cruise ships calling at South African ports.
- Joint marketing of cruise terminals to international cruise liners is key to removing the over-reliance on specific cruise liners

⁴¹ World Economic Forum. How virtual tourism can rebuild travel for a post-pandemic world

SECTION 6: INSTITUTIONAL FRAMEWORK

6.1 Introduction

Unlocking the potential of tourism at a national, provincial and local level is dependent on financial and logistical support from all three spheres of government as well as from the private sector and communities. Only if such support is demonstrated will tourism be able to play the expected role of achieving the competitive edge needed by the economy.

Adequate coordination between the provincial, district and local tourism functions is thus critical. Efforts to intensify or revive the existing tourism structures at all levels are essential. Ensuring that such structures are functioning effectively is vital. Effective coordination depends on the commitment of the various participants in such structures. Strategic partnerships and private sector investment should be encouraged.

6.2 Main Challenges

The following main challenges have been identified for the province:

6.2.1 Coordination Issues

- There is a general disconnect and lack of cohesion regarding the institutional functioning of tourism in the province.
- The sector role players are working in silos: the various departments and associations are developing their own tourism strategies. Oversight and alignment are needed.
- Lack of capacity at a local level, both in resources and funding.
- Lack of effective collaboration and engagements in this sphere.
- The National Department should play a more active and visible role in assisting the province when it comes to tourism planning and development.
- When it comes to the forum platforms, there is no consistency in participation and reporting from the private and public sectors.
- ECPTA, municipal officials/representatives, and local tourism organisations are not coming together to merge their tourism development plans/strategies to ensure alignment.
- Large-scale projects are being launched without seeking proper sector input. Funds can be better allocated to have a bigger impact on tourism.
- Ground-level support for tourism development is not being provided, especially for local tourism organisations and local product owners.
- A lack of understanding of the tourism sector and how it operates (also how the value chain operates) hinders productivity and the sector's ability to move forward.

6.2.2 Tourism Budgeting Issues

- Insufficient tourism budgets are allocated to municipalities and LTOs. The matter of funding for tourism remains an issue that is not discussed. Currently, there is no clear budget allocation from either the national or provincial governments to fund the operations of local tourism organisations
- In the instances where there is a budget, it is typically misallocated and those responsible cannot account for expenditure. There must be more transparency in expenditure.
- There is a desperate need for appropriate allocation of budgets at government level to implement the relevant actions at a district and local level.

- Sector role players are not on the same page when it comes to tourism planning and development. There is a separation between WHA, SATSA, SAMSA, ECDC, DEDEAT, the COEGA Development Corporation, etc.
- There are instances where tourism forums and groups are doing the work that tourism departments are supposed to do.
- There needs to be transparency about how budgets should be allocated and spent because this is not only a local government issue but also a provincial one between DEDEA and ECPTA.

6.2.3 Tourism Implementation Issues

- Offering support for sector development should be more than simply theoretical and on paper. It should also be practical so that it can be implemented effectively.
- Year after year, tourism plans and strategies relay the same messages and instructions. However, very little effort is put into ensuring the implementation of these plans.
- There needs to be a rollout of action and monitoring and evaluation systems so that development and growth can gain momentum.

6.3 Key Considerations

Tourism Engagement and Communication Platforms

There is a considerable need for communication platforms to be developed for tourism in the Eastern Cape. Stakeholders have raised their frustrations over the lack of interaction between the different tourism role players. As reflected in Subsection 6.2 ('Main Challenges'), tourism platforms need to be created that will guarantee the interaction of different stakeholders to address challenges experienced in the sector as well as come up with solutions and actions to remove obstacles. These forums should be structured and coordinated, and the minutes should be available to all stakeholders to ensure transparency in these processes.

The development of the ECPTA Tourism Safety Forum and the Eastern Cape Tourism Transformation Forum will assist in addressing many of these challenges.

Commitment and Accountability

In its desire to "get back to basics", the sector should be reminded of the key principles that must guide the development of responsible tourism in South Africa as outlined in the 1996 White Paper:

- Tourism will be **private-sector driven**
- **Government** will provide the **enabling framework** for the industry to flourish
- **Effective community involvement** will form the basis of tourism growth
- Tourism development will be underpinned by **sustainable environmental practices**
- Tourism development is dependent on the establishment of **cooperation and close partnerships** among key stakeholders
- Tourism will be used as a **development tool** for the empowerment of previously neglected communities
- Tourism development will support the **economic, social, and environmental goals** and policies of the government.

Each stakeholder group has specific roles and responsibilities for tourism in the province. For the sector to be sustainable and grow (increase its economic contribution and potential to create jobs), it should be supported by capable, ethical, and responsive institutional structures. The systems and

structures that support tourism planning and development must be constantly improving and maturing to retain organisational agility.

The province needs sustainable tourism platforms where all stakeholders get together and come up with solutions. Plans and strategies need to be activated so that not only the sector but also the province and its people as a whole can reap the benefits of tourism. Empty promises are causing damage to the trust of stakeholders who invest and dedicate their time and resources to grow the sector, only to be met with disappointment. Collective commitment and action are needed to fix the cracks in the foundation and start building sustainable development solutions.

6.4 Recommendations

- Accountability mechanisms are needed at a provincial and district level to ensure that allocated tourism responsibilities are attended to.
- There needs to be a concerted push to institute accountability.
- Employ the right people. Get the right people in tourism positions. The province needs tourism champions who are passionate about tourism development and who can drive action plans.
- The functionality of the provincial and local tourism forums must be reviewed and improved.
- The role of municipal local economic development positions must be enhanced.
- Foster integrated strategy setting and planning as well as co-monitoring implementation.
- Adopt a bottom-up approach to tourism planning, as a top-down approach will not produce sustainable outcomes for the sector.
- Heed the pleas of stakeholders: “We need communication platforms. We need a foot in the door at strategic planning sessions.”
- Establish collaboration forums between the regions that jointly deal with addressing and planning for specific issues, e.g., guide training and accreditation.
- Enable access to tourism departments’ plans for tourism. Plans need to merge and correlate with one another. Communication on these plans needs to be established.
- All relevant role-players should be involved in government strategic sessions or have access to the minutes of those meetings to know what was said and the actions that are planned. This is also of importance for the alignment of sector initiatives.
- Share provincial and regional capacity opportunities and gaps information to enable private sector investment in strategic locations where demand is demonstrated, and investment interest exists.
- Stakeholders need to collaborate and communicate on the same platforms to implement transformation efforts, incorporate communities and empower them through active participation.
- Build and sustain multi-agency partnerships for tourism development programmes.
- Develop working groups that the different regions can attend to deal jointly with addressing and planning specific tourism initiatives. These discussions can then be represented at the bigger tourism forums.



SECTION 7: IMPLEMENTATION PLAN

The Implementation Plan (IP) is the principal tool for guiding the development of the tourism sector in the province. The purpose of the implementation plan sets out the measures that will be implemented over the next ten years to achieve the goals outlined within the Tourism Master Plan. The Eastern Cape's vision for tourism can be realised should the institutional framework operate effectively and mobilise the implementation of key actions as outlined in the IP.

7.1 Priority (Timeframe) Level

The priority level involves priority assignment to every action or process, the priorities are ranked in terms of importance. Factors that influence priority ranking include urgency, value, timeframe, cost, marketing and other operational and developmental challenges. Priority assignment is evaluated on the following level of importance/urgency:

Table 6: Implementation Priority Description Table

Priority Level	
High	Processes/actions with the highest priorities are carried out first. They are labelled as 'currently critical'. These actions operate within a priority basis of high business impact. This should be implemented within the next financial year (1-2 years).
Medium	These actions have equal priorities and are carried out on a first-come-first-served basis. They are 'potentially critical' and are subject to the availability of resources. These actions operate within medium business impact. This should be implemented in 3-5 years .
Low	These actions are recommended and necessary, however, it does not have an immediate impact on the quality, performance, or functionality of the tourism sector. This includes cases of general requests that are not tied to a specific mission milestone and has the least business impact. These actions are usually dependent on other processes to be in place first before they can be addressed/ implemented. This should be implemented in 5-10 years .

7.2 Key Consideration for Implementation

- ✚ Ongoing evaluation of the strategies and status of completing actions in all these different categories will be critical for the long-term revitalisation of the tourism sector. The purpose of the IP is to provide a collective resource that identifies the implementation action, the relevant stakeholders and the level of importance and urgency of each action.
- ✚ It is important to keep in mind that government departments/organisations can only act according to their respective mandates. For each action recommended in the plan, the identified role players should be differentiated for their specific roles and responsibilities. For example, when it comes to Product Development- it is not the responsibility of the government to develop tourism products, however, they should create an enabling environment and may facilitate certain processes to an extent.

7.3 Implementation Plan

Table 7: Destination Accessibility

Pillar	Focus Area		Actions	Timeframe Priority	Key Stakeholders	Priority Sites /Regions/ Products / Events
Destination Accessibility	Universal Access		Accommodate the disabled in destination planning approaches-ablution, walkways, parking, etc.		DEDEAT, Department of Transport, Department of Tourism, Municipalities, Product Owners, Accommodation Establishments	➤ All Districts
			Ensure universal design principles are adopted in the design and operation of accommodation facilities			
			Include provision for people with disabilities, in municipal by-laws			
	Infrastructure	Roads	Prioritise access roads to tourism products and accommodation establishments		Department of Transport, DPW, Local Government, SANRAL, DEDEAT, Product Owners	➤ All Districts ➤ Adelaide, Fort Beaufort ➤ Sarah Baartman Region- Steytlerville – Willowmore Road upgrade ➤ Sundays River Valley- R335 from Port Elizabeth to the Addo Elephant National Park
			Identify and prioritise those main tourist routes that need repair/maintenance within each local municipality			
			Routine maintenance on roads is vital to provide access and safe driving conditions to tourists			
			Prioritise tourist safety on main tourism routes			
		Signage	Conduct tourism signage audits/mapping to identify and address signage needs and challenges			

Pillar	Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites /Regions/ Products / Events
		Investigate the possibility of adopting more technological advances in the design of signage			<ul style="list-style-type: none"> ➤ The Farmstall (Addo National Park entrance) ➤ Baviaans Region
		Provide more guidance and information on the application process and getting approval for signage. Facilitate these applications and provide effective support to businesses.			
		Review existing signage and improve where necessary, e.g., electronic tourism boards.			
		Ensure that there is effective directional signage en route and within each region			
		Turnoffs from the N2 to resorts need boards with distances to destinations on that route. Also, add km markers every 10 km to reassure tourists that they are on the right track.			
	Transport	Engage with private and public transport companies to create linkages between attractions and activities.		Department of Transport, Private Sector, SMMEs, ACSA, SAIMI, Department of Tourism	<ul style="list-style-type: none"> ➤ All Districts ➤ Needs analysis to be conducted
		Put together a guide/framework that relays transport network information to visitors to enhance navigation in and around the various districts/towns			
		Establish more (affordable) bus/shuttle services between different towns and to and from tourist attractions			
		Review air access- airport and flight availability across all regions and investigate opportunities to increase flight options and locations			

Pillar	Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites /Regions/ Products / Events
	Access to Information and ICT	Facilitate the development of harbours in the province to promote cruise and sailing boat tourism in the province			
		Provide relevant and reliable product information on marketing agency websites and business websites		DEDEAT, ECPTA, Municipalities, Private Sector	<ul style="list-style-type: none"> ➤ All Regions ➤ Nieu Bethesda
		Encourage product owners and municipalities to make sure their websites are running and have the latest information available on offerings and services			
		Continuously update the province's tourism product database to ensure that information is current and easily accessible			
		Provide marketing training/support to businesses on how to effectively promote their offerings			
		Implement measures to roll out and increase internet/Wi-Fi provision/connectivity			
		Product (and destination) website designs should be interactive and able to guide visitors to their specific interests.			
		Businesses to consider introducing virtual experiences as part of their offerings. They could experiment with 4D technology in this regard to create a cultural interface.			

7.4 Destination Management

Table 8: Destination Management

Pillar	Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites / Regions / Products /Events
Destination Management	Infrastructure Development and Maintenance	Prioritise infrastructure development and maintenance at local government level. Develop a guidance document for the identified municipalities that need to implement it.		DPW, DEDEAT, Private Sector	➤ All regions
		Identify, address, and rectify dilapidated and decaying tourism infrastructure across the province that is hindering tourism growth and development			➤ All Districts ➤ 67 Steps in Gqeberha ➤ Port St Johns ➤ uMngazi region ➤ Morgans Bay ➤ Kariega Slipway ➤ Tourist Facilities
		Develop a toolkit for all development points/sites to incorporate and enhance the visitor experience component			➤ Collapsing banks along KOWIE River-Port Alfred ➤ Wharf Street sewerage pump station ➤ Island Car Park Kleinmond Area ➤ Entrance to Baviaans Nature Reserve ➤ Bloukrans Pass-Infrastructure Development
		Develop, implement, and monitor an effective maintenance plan for existing tourism offerings/spaces			
		Conduct proper research through feasibility studies before new developments are implemented within the tourism sector.			

Pillar	Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites / Regions / Products /Events
	Service Delivery and Destination Appeal	Enable effective service delivery within all local and district municipalities, especially in areas where the tourist flow is stronger e.g., tourism hotspots/hubs		DEDEAT, Local Municipalities, Local and Provincial Government, Private Sector, Environmental Organisations	<ul style="list-style-type: none"> ➤ General Coastal Sites and Beaches ➤ East Beach Port Alfred ➤ Cape St Francis main beach ➤ Old Harbour Slipway at Grannies Pool ➤ Entire Kouga shoreline ➤ Hogsback Service Delivery
		Ensure that public leisure areas, gardens, and roads are kept clean and neat- launch clean-up campaigns/drives, and get locals involved to address the cities and towns that are dirty			
		Address water and electricity provision problems throughout the province			
		Enable tourist access to clean, working ablution facilities en route and within the province			
		Review and revise access to guiding opportunities, training, and accreditation needs			
	Tourism Data Collection and Research	Collaborate with provincial and national research initiatives		ECPTA, ECDC, NDT, SAT, Tourism Organisations, Private Sector, Academic Institutions	<ul style="list-style-type: none"> ➤ All regions
		Roll out the ECPTA tourism information and data collection system in collaboration with all sector players to collect and store real data to generate more reliable statistical information to base tourism planning and development on			
		Make tourism data available to all sector stakeholders by providing access to these platforms/resources.			
		Deploy tourism monitors/ambassadors at identified hotspots throughout the province to collect data			

Pillar	Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites / Regions / Products /Events
		Implement Wi-Fi provision that is subject to a short survey to gather high-level tourist information.			
	Tour Guiding	Train local members of the communities to become guides for international or domestic hikers. This leverages the local knowledge that the local communities have and creates job opportunities and safety for tourists		Provincial Registrar, DEDEAT, Tourism Organisations, Communities, Private Sector, DSRAC, Tour Guides Association EC, South African Adventure Industry Association, SA Adventure Industry Association (SA AIA), SAT	<ul style="list-style-type: none"> ➤ All regions ➤ Coffee Bay- Hole in the Wall
		Publish information about registered tourist guides within the province and associations of tourist guides and any other information to promote and develop the tourist guiding sector within the province			
		Engage with relevant organisations to address challenges experienced by guides in the Eastern Cape, e.g., the Culture, Art, Tourism, Hospitality, and Sport Sector Education and Training Authority and the National Federation of Tourist Guides and Affiliates South Africa.			
		<ul style="list-style-type: none"> ➤ Provide continuous training for tourist guides on relevant sector matters to update their knowledge on trends, market needs, etc. ➤ Train guides to cater to foreign language requirements ➤ Develop training programmes for guides in the adventure tourism sphere ➤ Train guides to capture and upload Google Maps Street View content 			
		Conduct a screening exercise on tour guides in the province to monitor illegal guiding activities			

Pillar	Focus Area		Actions	Timeframe Priority	Key Stakeholders	Priority Sites / Regions / Products /Events
	Institutional Functioning	Development of Priority Tourism Forums	Tourism platforms need to be created that will guarantee the interaction of different stakeholders to address challenges experienced in the sector as well as come up with solutions and actions to remove obstacles. These forums should be structured and coordinated, and the minutes should be available to all stakeholders to ensure transparency in these processes		DEDEAT, ECPTA, Provincial Government, SAPS, Transformation Council,	➤ Mkhambathi Community Concessions
			Mobilise and provide support to the ECPTA Tourism Safety Forum			
			Mobilise and provide support to the Eastern Cape Tourism Transformation Forum (ECTTF)			
			Engage with community tourism forums to include them in tourism planning and development			
			Establish collaboration forums between the regions that jointly deal with addressing and planning for specific issues, e.g., guide training and accreditation			
		Institutional Arrangements and Stakeholder Coordination	Develop a sector communication plan to ensure coordination between government departments for effective communication and execution of functions		DEDEAT, Local Government, Tourism Organisations, Private Sector, SAMSA, SANRAL, ECPTA, COEGA Development	
			Prioritise regular meetings of RTOs and LTOs with ECPTA to rebuild, fund, and up-skill local tourism organisations			
			Promote stronger collaboration with the private sector so that opportunities and challenges can be dealt with as soon as they are raised			

Pillar	Focus Area		Actions	Timeframe Priority	Key Stakeholders	Priority Sites / Regions / Products /Events
			Develop interactive communication/participation platforms with local communities to create awareness and educate on eco-tourism initiatives e.g., greening of products		Corporation, WHA	
			Provide adequate support (resources and capacity building) to local tourism organisations and tourism products			
			Host workshops and roadshows with Training Programmes and Services companies to create awareness of all available skills training			
	Commitment and Accountability		Priority should be afforded to local level tourism development		DEDEAT, Provincial and local government, Tourism organisations and forums	➤ All regions
			Establish accountability mechanisms are needed at a provincial and district level to ensure that allocated tourism responsibilities are attended to			
			Review the existence, structures, and functionality of the provincial and local tourism forums			
			Foster integrated strategy setting and planning as well as co-monitoring implementation.			
	Grading of Accommodation		Develop support programmes to guide product owners in the grading process		DEDEAT, ECPTA, TGCSA, Private Sector	➤ All regions
			Promote meaningful benefits and cost structure to encourage grading			

Pillar	Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites / Regions / Products /Events
		Tourism grading needs to make provision for homestay huts. Systems and standards need to be set for the grading and assessment of these huts.			
	Tourist Safety	Matters relating to tourist safety should be afforded priority status by the provincial government and law enforcement departments/groups		DEDEAT, SAPS, DPW, Private Sector, ECPTA, Tourism Safety Forum	<ul style="list-style-type: none"> ➤ All regions recorded challenges with general- and tourist safety ➤ Mthatha ➤ Butterworth ➤ Coffee Bay-Hole in the Wall
		Deploy tourism police units at tourism 'hubs'/strikes on roads-Visible policing			
		Ensure effective responses to incidents of crimes against tourists			
		Implement CCTV cameras at busy touristic spots (at attractions & activities)			
		Prioritise the visibility of- and access to- emergency services information			
		Provide safety advice to tourists to create awareness of various risks			
		Work with tourist guides and local communities to address issues of crime.			
		Conduct safety perception surveys/scoping exercises with visitors to capture tourists' safety concerns			
		Mobilise and capacitate the ECPTA Tourism Safety Forum in addressing tourism safety-related matters			

Pillar	Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites / Regions / Products /Events
		Address tourist harassment issues at tourism attractions			
		Facilitate the development of a Victim Support Programme for the province			
		Conduct safety awareness programmes through various service stations across the different regions			
		Manage destination perceptions through brand damage caused by the negative press on how incidences of crime were addressed/resolved and reporting on positive tourism news.			
	Skills Development	Conduct an audit to determine and evaluate the main skills gaps and needs of the tourism sector		CATHSSETA, DEDEAT, ECPTA, District Municipalities, Private Sector Academic Institutions, Tourism Associations	➤ All regions
		Engage with the relevant organisations and departments to host/provide skills programmes for sector employees			
		Adopt a comprehensive tourism skills development coordinating structure			
		Investigate public-private training partnerships' potential in collaboration with academic institutions and tourism associations			
		Provide training in product packaging. Host workshops that address the following questions: Who should package a tourism product? How do you do it? How do you price it?			
		Equip business owners with the basic computer skills that they need to operate more effectively.			

7.5 Marketing

Table 9: Marketing

Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites / Regions /Products/ Events
Destination Readiness and post-Covid Marketing Approaches	Adapt marketing efforts and key messages to address post-Covid travel health and safety protocols as well as new travel behaviours and trends			
Market Segmentation	Focus marketing efforts and tour packages to specific markets i.e., domestic market- millennials, families, couples, seniors, backpackers		ECPTA, Travel Agent, Tour operators, Product Owners, Local Government	➤ All regions
	Package affordable offerings for this market- value for money products, family & recreation			
	Capture the millennial market with off-peak and mid-week travels- package 'specials'			
	Partner with local radio stations to campaign tourism offers that appeal to the relevant audiences			
Brand Establishment	Review and evaluate the Eastern Cape tourism brand and overall positioning as a tourism destination. The brand approach should reflect the 'personality' of the different areas and differentiate them from one another		ECPTA, Travel Agent, Tour operators,	
	Develop a Provincial Tourism Marketing Strategy for the Eastern Cape and benchmark it with other destination marketing strategies such as those issued by the Western Cape (WESGRO) and KZN.			

Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites / Regions /Products/ Events
	Develop and implement a brand awareness communication plan with clear, compelling, and consistent messages that integrate the provincial marketing strategies to targeted visitor markets		Product Owners, Local Government	
	Make use of more innovative distribution channels- promotional videos, host competitions/challenges, and create discussion platforms on social media			
	Develop, and make use of database marketing to build client relations and build trust			
	Create a branding strategy for the EC to promote offerings in all regions			
	Leverage user/consumer-generated content by developing campaigns that invite user involvement.			
	Market the province at relevant trade shows and exhibitions. Ensure that the tourism sector is represented on these platforms.			
	Establish a provincial bid fund to encourage better collaboration; the fund should be headed by a steering committee.			
	Develop a unique #hashtag for marketing purposes to engage with followers and promote the province more effectively on social media.			
Friendly N6/ Eastern Cape Highlands	Revise the marketing approach and classification of this region			➤ Eastern Cape Highlands
	Engage with all relevant sector stakeholders on this matter			

Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites / Regions /Products/ Events
Packaging the Regions	Branding per region should be improved. Find the unique DNA and character of each region/town, avoid too much description, and provide marketing stories.		ECPTA, Travel Agent, Tour operators, Product Owners, Local Government, Local and Regional Tourism Organisations	➤ All Regions
	Develop “brand stories” to position the different areas and towns and establish their uniqueness/character through promotional and marketing approaches.			
	Make use of experience-specific images for the different regions to capture their uniqueness and not only present photos of generic scenic views.			
	Ensure that promotional/marketing material’s text is more dynamic. Steer away from tiresome descriptions and details.			
Digitalisation	Investigate the viability of App development for the province but also the individual tourism regions		ECPTA, DEDEAT, Private Sector, Municipalities, SMMEs	➤ All Regions
	Provide support to SMMEs on internal operations i.e., for sales and marketing			
	Customise visitor experiences through digitalisation opportunities			
	Make use of more innovative distribution channels- promotional videos, host competitions/challenges and create discussion platforms on social media			
	Encourage all product owners to keep their websites and systems updated making use of relevant and reliable ICT channels			

Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites / Regions /Products/ Events
VICs	Employ mobile VICs in more peripheral/rural areas to provide tourists with information.		DEDEAT, ECPTA, Local Government, Private Sector	<ul style="list-style-type: none"> ➤ Bloukrans Bridge ➤ Hogsback ➤ Tsitsikamma/Koukamma Region
	Determine the viability of VICs in the modern age, and identify areas where there is a need for a VIC.			
	Revitalise and reposition information centres across the province that are interactive and interpretive			
	Employ trained and knowledgeable information officers to manage these posts			
Increase Length of Stay	Attractive and affordable product packages can entice people to stay longer and explore more in the region.		ECPTA, DEDEAT, Private Sector, Municipalities	<ul style="list-style-type: none"> ➤ All Regions
	Target business travellers by packaging pre-and-post meeting/conference itineraries.			
MICE Industry	Position the Eastern Cape as a prime business destination		ECPTA, DEDEAT, Private Sector, Municipalities, SAACI	<ul style="list-style-type: none"> ➤ East London/Buffalo City: Regional MICE hub
	Highlight existing conference venues through more aggressive marketing in the MICE industry space			
	Create incentive packages that are more widespread across the provinces to expand business tourists' exposure to what the province has to offer			
	Develop tourism packages that are quick and easy for the limited time that business tourists spend at a destination			

Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites / Regions /Products/ Events
	investigate leisure & business (bleisure tourism) potential in the different districts and how this can be leveraged.			
Events and Festivals	Revise the province's events calendar to identify events or other potential opportunities in this regard.		ECPTA, DEDEAT, Private Sector, Municipalities	<ul style="list-style-type: none"> ➤ Grahamstown National Art Festival ➤ Addo Rose Fayre ➤ Hogsback Spring Festival ➤ JBay Winterfest ➤ Bedford Garden Festival ➤ St. Francis
	Develop a starter pack of support for new festivals that show tourism potential. Could include marketing, hosting of media and ideas to improve the concept.			
	Highlight existing events & festivals through more aggressive marketing			
	Coordinate the events calendar to address challenges related to seasonality and the geographical spread of tourists in the province			
Product Revitalisation	Implement a stronger and more focused marketing approach to uplift the heritage and cultural offerings in the province as well as other identified niches		ECPTA, DEDEAT, Private Sector, Municipalities	<ul style="list-style-type: none"> ➤ All regions ➤ Fish River Resort and potential mixed-use development linked to this
	Collaborate with stakeholders on tourism development in niche areas and promote these offerings to create a stronger awareness thereof			
	Develop new and innovative marketing content on existing products (e.g., virtual tours, video content etc.)			
	Collaborate with stakeholders on tourism development in niche areas and promote these offerings to create a stronger awareness			

Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites / Regions /Products/ Events
	Identify products that need upgrading and relevant infrastructure to be used for tourism purposes			
	Develop linkages with neighbouring destinations to package existing products in new and innovative ways e.g., according to themes			
	Establish tourism forums to allow communication between the public and private sector			
Sector Marketing Collaboration	Coordinate marketing and development initiatives between government departments, between the public and private sector		ECPTA, DEDEAT, Local Government, Tourism Organisations, Product Owners, COGTA	
	Facilitate ECPTA and tourism organisations’ coordination			
Skills Development	Provide training/skills transfer exposure to tourism businesses on how to transform a product and/or service into an “experience”			
	Products need to be trained in how to write a brand their unique story- investigate the use of visuals in promotional material			

7.6 Product Development

Table 10: Product Development

Pillar	Focus Area		Actions	Timeframe Priority	Key Stakeholders	Priority Sites/Regions/ Products/ Events
	General		Conduct a gap analysis to identify product development opportunities/areas within the province		DEDEAT, ECPTA, ECDC, NGOs	➤ All regions
			Do a re-evaluation of the scope of product development that matches the desires of our customers.			
			Unlock funding opportunities for tourism development			
			Promote and implement responsible and sustainable tourism development approaches			
	Niche Development	Adventure	Investigate the possibility to expand on hiking and mountain biking routes throughout the province		Private Sector, DEDEAT, ECPTA, Tour Operators, WHA, SA Adventure Industry Association (SA AIA), EC Tour Guide Association	➤ Wild Coast ➤ Transkei Trek biking event
			Expand on this niche through offerings such as rock climbing, abseiling, and paragliding			
			Develop and host more adventure events/activities e.g., warrior races/running events in the outdoors as these are low-risk activities and will also attract the domestic market more.			
		Agritourism	Incorporate the farmers into an agri-tourism route, thereby opening doors to a potential tourism market which can help keep their farming sustainable		DEDEAT, ECPTA, Private Sector, Communities	➤ Kouga Region: Milk Farming, Strawberry Farming, Dragon Fruit Farm, Citrus Farm,

Pillar	Focus Area		Actions	Timeframe Priority	Key Stakeholders	Priority Sites/Regions/ Products/ Events
			Collaborate and share information and strengthen communities to facilitate a sustainable future which allows for additional income sources for farmers			Cheese, Craft Distilled product made from pure fruits ➤ Stutterheim area
		Hunting Tourism	Address wildlife ranching challenges with access roads, airlift, and wildlife transportation		AGRI EC, DEDEAT, PHASA EC, WRSA, SA Hunters, SECSICOM (Stakeholders In The Eastern Cape Safari Industry Committee).	➤ Graaff Reinet Area ➤ Kwandwe Region
			Reduce red tape in the regulatory environment, which requires permits and approvals for transporting game, buying and selling wildlife, and other related activities			
			Implement awareness creation and perception management on these practices (legal and ethical matters)			
		Coastal and Marine Tourism	Implement safety measures in coastal regions and at beaches to improve visitor experiences at these places.		DEDEAT, SAIMI, Department of Tourism, Private Sector, ECPTA, DEDEAT, Inkwenkwezi Private Game Reserve	➤ Nelson Mandela Bay Region- Bayworld redevelopment/Happy Valley, Municipal Resorts
			Employ dedicated lifeguards who take their duties seriously and provide continuous training.			
			Develop a cruise liner brochure highlighting experiences that could be undertaken			
			Mentorship and incubation programmes for CMT			
			Package and promote tourism products/experiences that correspond to cruise passengers' time limitations and offer shopping opportunities that would not be available on-board			

Pillar	Focus Area		Actions	Timeframe Priority	Key Stakeholders	Priority Sites/Regions/ Products/ Events
			Expand and enhance destination products for shore excursions and pre-and post-cruising options to make more options available to both the day visitor and the overnight guest.			
		Culinary Tourism	Conduct a feasibility study on the development of a culinary route within the province		DEDEAT, Hospitality Schools/Training Centres, ECPTA, Hospitality Industry, chef students, Private Sector, Tourism Organisations	
			Collaborate with tertiary institutions' hospitality departments and other hospitality training organisations to develop unique and innovative experiences/packages			
			Develop linkages between the heritage and cultural offerings and the culinary opportunities			
			Packaging a route based on the products produced by artisans in the province			
		Heritage and Cultural Tourism	Package and market more interactive & educational cultural experiences for tourists		DEDEAT, ECPTA, DSRAC, DPW, Provincial Government, Local Communities,	<ul style="list-style-type: none"> ➤ Sarah Baartman Grave Site ➤ 67 Steps ➤ Qhemegha Village Dinosaur Project ➤ Eastern Cape Highlands Craft Hub development ➤ Frontier Country-Settlers, Amafengu heritage, Frontier wars etc. ➤ Kouga Region- Khoi Culture & Tours
			Ensure that heritage and cultural offerings/sites are well maintained and features in the marketing of the specific region- museums and monuments should be given significant attention to promoting tourism and social cohesion.			
			Improve heritage management, maintenance and preservation methods.			
			Investigate creative industry development opportunities			

Pillar	Focus Area		Actions	Timeframe Priority	Key Stakeholders	Priority Sites/Regions/ Products/ Events
			Identify regions where street markets can be developed to diversify offerings while showcasing local arts and crafts.			
		Health & Wellness	Conduct a feasibility study on the availability of relevant products/sites within the province and the opportunity to package a themed offering based on these products.		Private Sector (spas, physicians, instructors, medical facilities, aesthetic/fitness clinics), DEDEAT, ECPTA, Tourism Organisations, Provincial and Local Government	➤ All regions
		Film Tourism	Engage with film production houses to use the EC for filming purposes—entice producers to film television shows/programmes in the province.		ECDC, ECPTA	➤ Wild Coast
			Enhance the EC destination brand narrative by leveraging the film industry.			
		Rural/Township and Community-based Tourism	Develop a model of how to approach this and training for those auctioning this. Local authorities and tourism offices are not equipped to develop these experiences		DEDEAT, ECPTA, Local Government, Private Sector, DSACR, Local Communities,	➤ All regions
			Create stronger awareness of homestay accommodation options and packages			➤ Tsitsikamma-Honeybush and Fynbos

Pillar	Focus Area		Actions	Timeframe Priority	Key Stakeholders	Priority Sites/Regions/ Products/ Events
			Identify township development opportunities/potential and engage with relevant partners to further explore the options		Community Tourism Organisations, COGTA, DPW	Community Product Development ➤ Red Location Cultural Precinct ➤ Lingelihle (Cradock), ➤ Umasizakhe (Graaff-Reinet) ➤ Walmer (Gqeberha)
			Provide support for Community Tourism Forums			
			Create a platform to forge linkages as well as network opportunities between tourism establishments and the local community			
			Develop participation packages for tourists to interact with local communities and learn about local cultural practices			
			Implement an educational element to tourist experiences where local history, culture and heritage and environmental conservation are shared with visitors			
			Identify township development opportunities/potential and engage with relevant partners to further explore the			
		Sport	Motivate more sporting and adventure events		Sport Organisations, Sport Unions, DEDEAT, DSRAC, Provincial & Local Government, ECPTA, Tourism Organisations	
			Investigate viable areas throughout the provinces that have the potential to host sporting events			
			Conduct infrastructure upgrades where necessary to improve facilities for sport tourism			
			Effectively market these events			
	Route Development and Management		Conduct an audit on the tourism products in the area, including all-natural and cultural assets.		DEDEAT, DSRAC, Provincial & Local	➤ Indi-Atlantic Route ➤ Kouga Agri-Tourism Route

Pillar	Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites/Regions/ Products/ Events
		Adopt an approved list of tourism routes and develop a framework with specific criteria for route development		Government, ECPTA, Tourism Organisations	<ul style="list-style-type: none"> ➤ Wild Coast Waterfalls Adventure Route ➤ Eastern Cape Highlands Route development ➤ Nelson Mandela Bay-Route 67
		Audit the viability of products before they are packaged as part of tourism routes			
		Ensure that route development processes contain structure, support, and proper coordination – including through packaging and marketing.			
		Establish a clear brand identity for the route and then market this according to the targets identified.			
		Ensure that existing and proposed routes are grounded in solid market research that identifies key target markets and their needs.			
	Repurposing existing products/spaces	Conduct an audit on municipal-owned entities that has tourism potential and can be developed as such		Provincial and Local Government, DEDEAT	<ul style="list-style-type: none"> ➤ All regions
	Leverage on existing developments	Investigate opportunities that exist for tourism development to take place in conjunction with other proposed/existing developments (i.e., mixed-use nodes etc)		Buffalo City Metro Development Agency, SANRAL, MBDA, DSRAC	<ul style="list-style-type: none"> ➤ East London Beachfront Development, ➤ NMB harbour development, ➤ Bridge development-Msikaba and Mtentu ➤ Cable car in use at N2 Wild Coast Road project – South Coast Herald
	Product Packaging & Linkages	As the EC shares borders with FS and NC, investigate potential product linkages to cater to target markets across these borders.		Private Sector, DEDEAT, ECPTA,	<ul style="list-style-type: none"> ➤ All regions

Pillar	Focus Area		Actions	Timeframe Priority	Key Stakeholders	Priority Sites/Regions/ Products/ Events
			Develop themed tours around the province's history, culinary arts, heritage, culture and education.		Communities, Local Government, Tourism Marketing Organisations, DSRAC	
			Launch roadshows with EC products to towns on feeder routes e.g Garden Route. Develop a system where products from neighbouring destinations/provinces can partner up and refer each other to visitors			
			Co-package of similar products- investigate route development in this regard			
			Develop customised experiences in line with consumer demand and preferences			
	PPPs		Identify areas in the sector where PPPs can be implemented e.g., the event industry, adventure tourism opportunities, management of municipal-owned reserves etc.		Communities, Private Sector, Provincial- and Local Government,	➤ All regions
			Conduct pre-feasibility studies to determine the viability of such partnerships			
			Ensure that suitable skills development programmes are made directly available to the private party to support its efforts			
	MICE Industry	Events Calendar	<ul style="list-style-type: none"> ➤ Develop an events strategy and calendar to coordinate the geographical spread of events and address seasonality challenges ➤ Improve the services and access to municipal facilities for event usage. ➤ Revive existing festivals 		District and Local Municipalities, ECPTA, DEDEAT, Private Sector, SAACI, SATSA, ICCA,	➤ Frontier Country-Bedford's Garden Festivals

Pillar	Focus Area		Actions	Timeframe Priority	Key Stakeholders	Priority Sites/Regions/ Products/ Events
		Business Focus	Enhance tourism infrastructure for businesses across the province		Provincial Convention Bureau	<ul style="list-style-type: none"> ➤ Nelson Mandela Metro ➤ East London
			Ensure that conference facilities/locations have reliable image, sound and video systems (dual screens, high-speed Internet connections and more) to effectively cater to and host such events			
			Diversify tourism packages for conventions			
			Develop packages that cater to the business tourists and their accompanying family members			
		Bidding and Cooperative Opportunity	Extensively engage in comparative bidding/facilitation and coordination of MICE activities to take place in the province			
			Look for cooperative advertising opportunities with business events partners			

7.7 Transformation

Table 11: Transformation

Pillar	Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites/Regions/Products/ Events
Transformation and SMME Development	Awareness-creation and Guidance of Tourism Transformation	Conduct a study to determine the state of transformation in the province. This will also assist in identifying the main challenges/constraints and opportunities to assist businesses to achieve targets		DEDEAT, NDT, Emerging and established SMMEs, Private Sector, SEDA, CATHSSETA, SATSA, TBCSA, TGCSA, WHA, WESSA	➤ All regions
		Educate the sector on how transformation can be achieved and how the processes to achieve it works			
		Provide guidance and assistance to businesses in creating opportunities to empower disadvantaged people, especially women and youth.			
		Host workshops & consultation sessions to create awareness & educate the people on the opportunities that they, as aspiring business owners, can capitalise on			
	Towards achieving B-BBEE Targets	Create awareness and provide business training to young entrepreneurs			➤ All regions ➤ Eastern Cape Highlands Women in Tourism Incubator Project
		Encourage entrepreneurship through stronger awareness of available support programmes (funding channels, business plan development etc.) to assist SMME owners			
		Collaborate with funding channels (NEF, IDC, NDT) & promote funding support and mentorship programmes through visits to communities/schools			

Pillar	Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites/Regions/Products/ Events
		The development of SMMEs in townships and rural areas will increase employment opportunities and expand the current tourism offerings			
		Equip young entrepreneurs with the necessary tools to build their own business by introducing them to the support channels/programmes currently available in the province (NDT, NED, IDC, SEDA)			
		Promote mentorship programmes to refresh and update tourism product owners on the latest skills development and implementation tools in the sector			
		Implement support systems in risk management and business rescue programmes through workshops presented to the industry to introduce them to these management tools			
		Develop a roadmap/catalogue of all the products that are registered or in need of skills transfer and/or funding.			
		Consider the development of a Local Business Support Centre in each District for aspiring businesses within the region to obtain direct access to training, funding institutions etc.			
	Expand Tourism Benefits to Rural Areas	Develop tourism products for ‘peripheral’ areas, provide infrastructure to support crafters in displaying their work		DEDEAT, ECPTA, Community Organisations, Local Government, Private Sector, COGTA, WCHA	
		Develop excellent branding of each township package to differentiate it from those in bigger centres.			

Pillar	Focus Area	Actions	Timeframe Priority	Key Stakeholders	Priority Sites/Regions/Products/ Events
		Develop activity nodes to attract tourists to these areas and encourage local community participation to expand the benefit spread			
		Beneficiation of communities through the operation and management of provincial nature reserves.			
		Sustainable establishment of community cooperatives relating to cultural products and tourism services			
	Funding	Create awareness of funding/grants that are available from government institutions.		DEDEAT, NDT, Private Sector, Relevant funding support organisations/funds	
		Enforce accountability within departments and organisations relating to the approval and allocation of funding towards tourism to eliminate the mismanagement of funds			
		Consider the development of a tourism fund for the province			
	Skills Transfer	Tertiary education and skills training should be aligned with the priority economic sectors within the province to optimally utilise local opportunities in these sectors.		CATHSSETA, DEDEAT, ECPTA, District Municipalities, Private Sector, Academic Institutions	
		Partner with product owners in advertising and providing future (hospitality) students with training and skills internships within the sector			
		ICT is still a challenge for most businesses/entities. Digital marketing and related training to be provided			

SECTION 8: MONITORING AND EVALUATION

8.1 Introduction

The performance of the Eastern Cape's tourism sector requires constant review and reflection, necessitating the presence of a monitoring and evaluation framework for tourism. It is important to track and evaluate the progress of projects that have been identified for implementation. Thorough monitoring and evaluation involve, among other things, keeping a record of project planning, development phases, and continual progress. It enables all role-players to learn from experience and build on expertise and knowledge. With the establishment of roles and responsibilities, the relevant organisation, department, or individual must be held accountable for their function(s).

Monitoring and evaluation of a strategic plan such as the Tourism Master Plan hold the following benefits⁴²:

- It shows if the plan/s are being implemented successfully
- It ensures that the organisation is moving in the direction outlined by the plan/s
- It helps account to stakeholders regarding the progress and status of the plan or the organisation as a whole
- It allows the organisation to learn from its mistakes more effectively
- It helps leadership and management undertake corrective measures before it's too late to do anything about mistakes
- It helps to build commitment and support
- It can produce 'hard numbers' and calculates the impact of tourism on poverty
- It can grow local information resources about tourism

The implications of lack of monitoring and evaluation can be detrimental to any project. These include:

- Financial losses
- Deterioration of facilities and equipment
- Uncontrolled staff actions
- Non-adherence to budgets

8.2 Monitoring and Evaluation Recommendations

It is recommended that DEDEAT in collaboration with key tourism departments (on all levels of government) and provincial and local tourism stakeholders develop an effective monitoring and evaluation plan within the first phase of the Plan. It is suggested that the following actions be implemented to aid in the monitoring and evaluation of tourism projects going forward:



- Establish a Tourism Monitoring and Evaluation Unit for the province to preside over the implementation of projects.
- Appoint regional monitoring and evaluation agents to preside over the implementation of projects within the different tourism regions and report back to DEDEAT on progress being made or challenges encountered.
- The Tourism Monitoring and Evaluation Unit and regional agents to attend all relevant tourism development planning meetings- on a provincial and regional level (forums etc) to report on the individual projects' progress within the tourism regions. Meeting attendance should be enforced-

⁴² The South African Tourism Planning Toolkit. 2010

accompanied by heavy penalties for those who do not attend. This is to stimulate continuous stakeholder engagement to ensure that everything is on track, that all accounted parties are doing their job, and to identify potential problems early on.

SECTION 9: CONCLUSION

9.1 Key Considerations for Sector Growth

9.1.1 Tourism Prioritisation

One way to achieve successful tourism development is to incorporate tourism into all the required local planning. It stands to reason that if a municipality plans for, installs, and maintains the infrastructure that would satisfy residents (access, services, etc.), this would also be to the benefit of tourists. Some tourist-specific elements such as signage and information will have to be supplied in addition to services provided for residents, to cater for visitors who don't have local knowledge.

Tourism destination planning needs to be integrated into the Spatial Development Framework (SDF) and the IDP planning processes of local municipalities (and in many cases also into the plans of other sectors such as arts and culture), as these processes determine the priorities of the municipality and allocation of budgets. Tourism destination planning should also be aligned with the plans of other municipalities where there is a need for mutually supportive activities across municipal or provincial boundaries. There needs to be integration internally within the municipality and alignment and cooperation externally across municipal boundaries.

9.1.2 Institutional Organisation

Sector coordination and collaboration between local, regional and provincial role players are lacking and they are thus experiencing communication and organisational-channel issues. This negatively influences the success of the implementation of tourism development. Tourism planning needs to be mobilised and monitored by sector role players in all spheres of government and by the private sector. To make a success of Eastern Cape tourism, it is crucial that clarity is provided on the roles and responsibilities of all parties and that proactive steps are taken to be involved. Tourism institutional frameworks, whether at national, regional, or local levels, are critical elements of tourism development because they give expression to political and economic hopes for the tourism sector.

9.1.3 Creating an Enabling Environment

Creating an enabling environment for tourism requires that a variety of elements are implemented, become fully operational and are monitored and maintained.

1. Tourism Legislation: Acts, policies, and strategic plans



- Provide credible information that informs economic planning and planning processes
- Promote economic growth through alignment with national, regional and local development strategies and plans

2. Physical Environment: Infrastructure, basic service delivery



- Facilitate the development of strategic infrastructure projects that will stimulate competitiveness
- Establish, implement, and maintain effective systems to protect the environment
- The province needs to urgently prioritise and act to fix tourist roads and associated signage
- The other hurdle is communication and connectivity. Cell phone and Wi-Fi reception should be improved across the province- especially from a safety point of view. Should tourists encounter problems while travelling through the province, they should be able to call for help/assistance without experiencing reception issues.
- The province needs to investigate and look at developing and implementing **self-sustainability models** that will enable product owners to sustain themselves in terms of water, stable electricity supply etc.

3. Local Economic Development: Sector transformation and support to SMMEs



- Increase the number of jobs created through sector and cluster development
- Create opportunities for entrepreneurs to step into the market
- Develop strategic frameworks and partnerships for the support and promotion of SMMEs

4. Building local pride and support for tourism



- A shared vision should be developed between the citizen who lives in the province, the tourist that visits it, destination management, and the different stakeholders to add value for the citizen and the visitor.
- Provide citizens and tourists with a collaborative platform that allows communication between the public administration and citizens or tourists/visitors