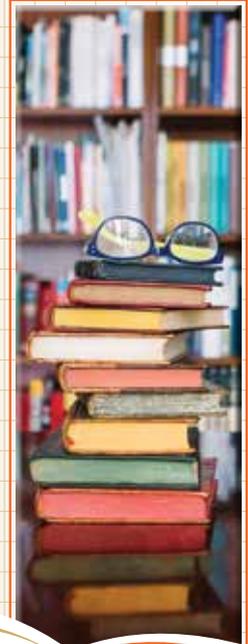
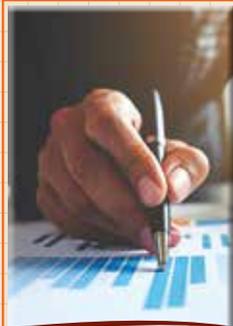


7th TOURISM RESEARCH SEMINAR

*“Advancing Research for Tourism
Growth and Development”*



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA



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1. INTRODUCTION AND BACKGROUND

The 2020 National Tourism Sector Strategy (NTSS) recognises research as one of the key success factors for sustainable competitiveness in destination management and emphasises the important role research plays to guide planning and decision making. The strategy highlights the need to build partnerships and collaboration in order to strengthen the context, use and dissemination of research findings to inform policy and decision making. It is on this basis that the Department of Tourism (the Department) strives to collaborate with institutions of higher learning to conduct tourism research.

The Department signed Memoranda of Understanding (MoUs) with five (5) universities with a view to fostering collaboration and strengthening capacity in the realm of tourism research and skills development. The universities include University of Johannesburg (UJ), Cape Peninsula University of Technology (CPUT), University of Venda (UNIVEN), University of KwaZulu-Natal (UKZN) and University of Pretoria (UP). In the research area, the MoUs establish a formal basis of cooperation in support of research conducted in collaboration with these universities. Furthermore, the MoUs make provision for financial support to students pursuing tourism-related studies at these universities as well as training courses to up-skill and capacitate the Department's officials and industry stakeholders in relevant areas of need.

Since 2012, the Department has been collaborating with each university to conduct research studies aligned to the NTSS themes and informed by the university's expertise. The research findings are used to inform planning and decision-making within the tourism sector, thereby, enhancing tourism growth and development. The reports of these studies are available on the Department's Tourism Knowledge Portal: <https://tkp.tourism.gov.za/Research/researchpapers/Pages/default.aspx>

In addition to the research reports, several research initiatives/frameworks were developed and workshops were hosted to capacitate sector practitioners on their implementation. Emanating from the current study conducted by UKZN, a framework to assess the economic impact of Coastal and Marine Tourism (CMT) has been developed and was workshopped on 14 March 2019 with various practitioners. The framework further assists to better understand the economic contribution of CMT towards job creation, performance of the tourism sector and its potential to contribute towards the future economic development of the country.

Other frameworks that were produced over the years are as follows:

- CPUT developed a framework which provides a simplified and standardised approach to measure and assess the impacts of events of different types and sizes in different localities;

- UJ developed a customer satisfaction index for the accommodation subsector with a view to improve customer service satisfaction and service quality;
- UP's Department of Historical and Heritage Studies developed a generic regional cross-border tourist guide training framework, which outlines aspects of a tourist guiding course/syllabus that can be used as a baseline across the Southern African region;
- UP's Tourism Management Division developed the following outputs:
 - provincial competitiveness assessment model which measures demand and supply of tourism in a province against minimum levels required to obtain a competitive market position;
 - a market analysis framework for destination development which can be used by different tourism stakeholders to inform product development, infrastructure development and investment facilitation; and
- UNIVEN developed a framework to assist with enhancing the sustainability of rural tourism products in South Africa from both a demand and supply perspective

To ensure credibility of research outputs produced in collaboration with the universities, a Research Policy Expert Forum (the Expert

Forum) was appointed by the Minister to peer review and enrich the quality of all research outputs (Terms of References, research proposals, data collection instruments as well as the final research reports). The Expert Forum is comprised of individuals with expertise and skills in different areas such as research methodology, economics, statistics, tourism management and development, etc.

To ensure that research findings are useful to address the needs of stakeholders, research seminars are held annually to disseminate the research findings and obtain constructive feedback from a wide range of tourism stakeholders. The research seminar also provides an opportunity for students who receive financial support from the Department through the MoUs with the universities, to exhibit and showcase their research work and obtain valuable feedback from sector stakeholders. To date, the Department has hosted six (6) research seminars (from 2013 to 2018). The previous seminars succeeded in bringing together researchers, sector stakeholders, academics and other relevant government departments to network with peers and share ideas and best practices.

Today, the Department hosts the 7th Research Seminar with the key-message ***“Advancing research for tourism growth and development”***.



2. PROGRAMME

7TH TOURISM RESEARCH SEMINAR

“Advancing Research for Tourism Growth and Development”

Date: 15 March 2019 | **Time:** 08:30-14:30 | **Venue:** Southern Sun, Pretoria

Programme Director: Ms Anemé Malan | **DDG:** Tourism Research, Policy and International Relations

ITEM NO.	TIME	ITEM	LED BY
1.	08:00 - 08:55	Arrival tea and registration Post-graduates research poster exhibition during registration (Delegates to be seated by 08:55)	All
2.	09:00 - 09:05	Welcome and Programme Director's remarks	Programme Director
3.	09:05 - 09:20	Director-General's Opening Remarks	Mr Victor Tharage
4.	09:20 - 10:00	Key-note Address: importance of research for the tourism sector	Dr Hugh Bartis
5.	10:00 - 10:20	Topic: Leveraging State-owned tourism assets for black Small, Medium and Micro Enterprises development: a case of state owned parks, lodges and attractions	University of Johannesburg
	10:20 - 10:40	Topic: An assessment of the impact of mega trends in the tourism sector	University of Pretoria: Division of Tourism Management
	10:40 - 11:00	Question & Answer Session	Programme Director
6.	11:00 - 11:30	Tea Break (Post-graduates research poster exhibition)	
7.	11:30 - 11:50	Post-graduate student presentation Panthers and Places: Filmic representation and destination image	University of Pretoria: Department of Historical and Heritage studies
	11:50 - 12:10	Topic: Cross-Border themed tourism routes in the Southern Africa region – practice and potential	
	12:10 - 12:30	Topic: Indigenous Story Tellers (ISTs): Northern Cape as a case study	
	12:30 - 12:50	Topic: Development of a framework to assess the economic impact of coastal and marine tourism in South Africa – Phase (3)	University of KwaZulu-Natal
	12:50 - 13:20	Question & Answer Session	Programme Director
8.	13:20 - 13:30	Closure and way forward	Programme Director
9.	13:30 - 14:30	Lunch	

3. PROFILE OF KEYNOTE SPEAKER



Dr Hugh Bartis is a Principal Lecturer in the Tourism Department at the Nelson Mandela University. Since 1999 until 2015, he was the Head of the Tourism Department at this institution. During this period, he played a key role in developing and offering new Tourism programmes

from undergraduate to Post-Graduate level at the Nelson Mandela University. As a result of his expertise and in-depth knowledge about Tourism education as well as national policy requirements, he occasionally serves as Programme Reviewer for the Council on Higher Education. His association with Higher Education spans more than 20 years having worked in the public and private sector. He is an alumnus of the University of Fort Hare, Rhodes University, Ohio University and Nelson Mandela University and he holds a doctorate in Tourism Management from the latter university.

Apart from being in the academia, Hugh has served as a Non-Executive Director of the Eastern Cape Tourism Board. He is a former board member of the Southern Africa Tourism Services Association (SATSA) and previous SATSA Chapter Chair for the Eastern Cape Province. In addition, he has also served as a

Non-Executive director and Chairman of Nelson Mandela Bay Tourism. In 2013 he was appointed by the Minister of Tourism to serve as a member of the National Tourism Research Expert Forum. Hugh lectures on the undergraduate and postgraduate Tourism programmes at the Nelson Mandela University and also supervises six (6) Post-Graduate students at present.

4. PROFILES OF PRESENTERS

4.1 University of Johannesburg - School of Tourism and Hospitality:



Prof Christian Rogerson is a Research Professor attached to the School of Tourism & Hospitality. A human geographer by training, Chris obtained a BSc (Hons) from University College, London, MSc from University of Witwatersrand and a PhD from Queen's University,

Kingston, Canada. His research interests straddle issues of local and regional development, small enterprise development and tourism in the global South. Current research foci involve variously unpacking business tourism in sub-Saharan Africa; transforming local spaces through innovation and tourism;

inclusive tourism and local development; the informal economy and small business incubators; and, the historical evolution of South Africa's tourism industry.

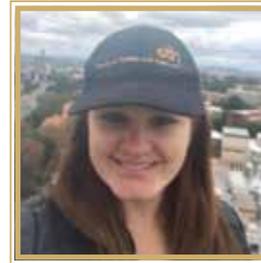


Dr. Love Odion Idahosa is a Postdoctoral fellow at the School of Tourism and Hospitality, University of Johannesburg, South Africa. Dr Love is a trained economist and obtained her PhD from the University of Stellenbosch Business school where she specialised in

applied behavioural, environmental and micro economics and econometrics. She also holds a Masters' degree in economics from the University of Cape Town, South Africa, and a Bachelor's degree in economics from Redeemer's University, Nigeria.

Her current research interests are on issues of market innovations and misfires in the economic, social and environmental welfare/inclusion space; applied econometrics and microeconomics; behavioural economics; environmental economics; Small, Medium and Micro Enterprises (SMME) development and local economic development. She is currently collaborating on the Department of Tourism's project titled "Leveraging State-owned

tourism assets for black SMME development: a case of state-owned parks, lodges and attractions". She is also working on a project titled "Market Innovation for SMME development and local economic development in the services sector in Sub-Saharan Africa".



Dr Julia Kathryn Giddy is a postdoctoral research fellow in the School of Tourism and Hospitality at the University of Johannesburg, South Africa. Her broad research focus is on tourism geographies. Specific research interests include human-environment interaction,

environmental psychology in nature-based tourism and the tourism-poverty nexus in the context of urban tourism in South Africa. Dr Giddy has written 14 journal articles, 5 book chapters and numerous conference proceedings. Her most recent paper, entitled "The influence of e-hailing apps on urban mobilities in South Africa" is currently in-press in the journal *African Geographical Review*. She is a member of numerous academic societies including the Society of South African Geographers, the American Association of Geographers and the Canadian Association of Geographers.

4.2 University of Pretoria - Department of Marketing Management:



Prof Berendien Lubbe is a Senior Research Associate in the Department of Historical and Heritage Studies at the University of Pretoria and researches emerging tourism issues. She holds a doctorate in Communication Management which she did on

South Africa's image as a tourist destination in Saudi Arabia. She is an NRF-rated researcher and has published in numerous internationally accredited journals. She has also contributed to international books with her latest chapters being on the Development of African Air Transport and the Use of ICTS in the Airline Industry. Her books on Tourism Distribution and Tourism Management in South Africa have been widely prescribed. She is a past recipient of a Laureate Award from the University of Pretoria for her contribution to educational innovation. She is also project leader and principal investigator in a number of research projects of national priority in the fields of tourism and consults widely to industry.

4.3 University of Pretoria – Department of Historical and Heritage Studies:



Prof Karen Leigh Harris is the Head of the Department of Historical and Heritage Studies at the University of Pretoria, lecturing undergraduate and postgraduate students in history as well as heritage and cultural tourism. She is also the Director of the University Archives; the Chairperson of the

Historical Association of South Africa; Executive Board Member of the International Society for the Study of Chinese Overseas and is also an accredited tourist guide. She is the principal investigator for the research projects conducted as part of a Memorandum of Understanding between the National Department of Tourism and University of Pretoria. She holds editorial positions on both local and international academic journals. She was recently a keynote speaker at the 18th World Federation of Tourist Guides Association Convention held in Tbilisi Georgia where she presented a paper on tourist guiding entitled; “Breaking Boundaries, Building Bridges”. One of her most recent publications on tourism, “Taking History of Tour: Lowering the disciplinary drawbridge”, appeared in the Journal of Tourism History, in 2017. Apart from being a pioneer in the teaching of the field of heritage and cultural tourism at tertiary level, Prof. Harris also conducts comparative work on minority groups within a South African context.



Mr Hannes Engelbrecht is a post graduate student, researcher and part-time lecturer at the Department of Historical and Heritage Studies at the University of Pretoria. He holds degrees in Heritage and Cultural Tourism and Visual Culture Studies and research interests include heritage and cultural tourism,

tourist guiding, film tourism, visual culture, tourist experiences and tourism enabling infrastructures. In the last three years he has been involved in a number of research projects for the National Department of Tourism and has previously spoken at a number of conferences, seminars and public engagements on the topics of film tourism and cross-border tourist guiding. He is also the co-developer and course leader for the first ever cross-border tourist guide training course between South Africa and Namibia. He has recently submitted his Masters Dissertation in Heritage and Cultural Tourism and plans to enrol for a PhD.

4.4 University of KwaZulu-Natal - School of Agriculture, Earth and Environmental Sciences:



Prof Urmilla Bob is a Full Professor of Geography in the School of Agriculture, Earth and Environmental Sciences at the University of KwaZulu-Natal, South Africa. She is also the University Dean of Research. She conducts

research on a range of developmental and environmental issues, including socio-economic impact assessments of developmental projects in relation to conservation and tourism projects as well as sustainable livelihoods in both rural and urban contexts. Much of the research undertaken adopts mixed methods approaches, drawing on qualitative and quantitative research. She has published in these fields in both nationally and internationally recognized academic books and journals as well as produced several reports. She has been involved in collaborative research with national and international academic organizations and NGOs, attending several conferences and workshops worldwide. She is involved in several training programmes and skills development initiatives. She has training expertise in quantitative (questionnaire surveys, SPSS, participatory GIS, etc.) and qualitative (participatory rural appraisal, mental mapping, problem ranking, focus groups, etc.) methodologies and techniques, monitoring and evaluation, development of indicators and environmental impact assessments, and gender analytical methodologies. She has supervised to completion more than 70 masters and PhD students in a range of areas including climate change adaptation, alternative energy, tourism, land issues in rural contexts and biodiversity conservation. Her research is directly linked to an overarching interest in sustainable livelihoods. She also has extensive experience in the design and management of research surveys and monitoring and evaluation systems. She has been involved in several national and international consultancy-based projects in this regard.

5. POST-GRADUATE STUDENTS RESEARCH POSTER EXHIBITION

The following table shows some of the post-graduate students that are financially supported through the MoUs with universities who will be exhibiting their research posters at the research seminar. Delegates are encouraged to engage with the students during registration and tea break.

Table 1: Post-graduate students research poster exhibition

NO.	STUDENT NAME & SURNAME	UNIVERSITY	LEVEL OF STUDY	RESEARCH TOPIC
1.	Ms Letladi Mafa	University of Venda - department of tourism and hospitality	Masters	Analysis of tourist segmentation in hotels: a case of Thulamela municipality
2.	Ms Magdeline Malesini Segooa		Honours	Expenditure patterns of students at tourist attractions in Vhembe District Municipality.
3.	Mr Hannes Engelbrecht	University of Pretoria - department of Historical and Heritage studies	Masters	Filmic representations of place image and tourism destinations: a case study of Johannesburg
4.	Mr CR Botha		Masters	Tourist guiding in the global south: A comparative analysis of India and South Africa
5.	Ms Lynette Govender	University of Pretoria - department of marketing management	Masters	Ethnic identity and culture as drivers of travel behaviour: the case of South African Indians as domestic tourists
6.	Ms Mnandi Weber		Masters	Corporate travel policy compliance: a generational analysis of corporate travelers.

NO.	STUDENT NAME & SURNAME	UNIVERSITY	LEVEL OF STUDY	RESEARCH TOPIC
7.	Ms Yehshantha Govindasami	University of Johannesburg - school of tourism and hospitality	Masters	Indigenous food knowledge and consumption patterns of Johannesburg residents
8.	Ms Amanda Gumede	University of KwaZulu-Natal	Masters	Perceptions of solar renewable energy technologies and applications in relation to use and impacts in low-income communities, KwaZulu-Natal, South Africa
9.	Ms Candice Webster		Masters	Implications of land use practices and human water interactions on socio-hydrological vulnerability within a catchment in rapidly developing city: A case study on the Umhlatuzana River in eThekweni Municipality

6. ABSTRACTS OF RESEARCH STUDIES

6.1 Leveraging State-owned tourism assets for black Small, Medium and Micro Enterprises development: a case of state owned parks, lodges and attractions - University of Johannesburg: school of tourism and hospitality

Abstract:

The challenge is recognised for achieving greater 'inclusion' in South African tourism, including provision of opportunities for formerly disadvantaged communities to benefit from sector growth. The National Tourism Sector Strategy calls for a broadening of the economic beneficiaries of tourism development, for programmes to attract more black entrepreneurs into the tourism sector and to own and operate tourism SMMEs. The achievement of inclusive tourism growth requires that benefits flow to local (black) communities as well as other groups (especially women and the disabled) that formerly remained largely outside of the mainstream of the country's tourism economy. National government has introduced a range of initiatives to deepen specifically SMME development in tourism sector, to support wider objectives of transformation and of inclusive growth in tourism. The majority of these existing initiatives are supply-side interventions aimed to enhance

enterprise support through, for example, business incubators. Recently, the DoT is concerned to complement these supply-side support interventions with a suite of demand-side initiatives. One significant facet of fresh policy thinking towards demand-side interventions is to leverage the potential of state-owned assets for tourism development and in particular for SMME upgrading. The question of leveraging state assets for tourism development was identified by the Department of Tourism in the National Tourism Research Agenda. The University of Johannesburg is undertaking a 3-year research project to examine the potential for leveraging the state assets for a demand-driven approach for inclusive tourism. Year one findings are given from this project using case studies in Pilanesberg and the Overstrand.

6.2 An assessment of the impact of mega trends in the tourism sector - University of Pretoria: department of marketing management

Abstract:

Global tourism has grown steadily over the last 60 years and is predicted by the World Travel and Tourism Council (WTTC) to reach 1.8 billion international arrivals by 2030. As an economic sector it has outperformed the global economy for the seventh year running, growing by 4.6% against 3%. This has not been the case in South Africa despite the fact that South Africa currently gains



the lion's share of international arrivals to the African continent. According to StatsSA, the contribution of tourism to the economy has declined from 3.3% in 2006 to 2.8% in 2017. Despite this tourism is increasingly being perceived as an important economic driver that can help turn South Africa's fortunes around. Globally tourism is influenced by shifts and megatrends, and South Africa, as part of this global industry, is also affected by these megatrends. This raises the question of whether South Africa can harness the opportunities presented by these megatrends to stimulate the growth of the tourism sector to contribute more to economic growth in South Africa. The aim of this study was to identify the megatrends that affect tourism globally, to assess the impact of these trends on the South African tourism industry and to develop a number of scenarios that depict the possible direction of tourism in South Africa. The future scenarios provide the alternative directions in which tourism can develop towards 2030 within the context of both certainties and uncertainties in the South African tourism sector. Five major trends were identified using a qualitative approach comprising the analysis of secondary sources and in-depth interviews with tourism industry leaders and policy makers: Economic; Political; Social; Technological and Environmental. Four future scenarios were developed through a consultative workshop. Each scenario depicts the level of competitiveness and industry integration that could potentially be achieved under different sets of circumstances with the best-case scenario showing an industry that is highly competitive and fully integrated.

6.3 Cross-Border themed tourism routes in the Southern Africa region - practice and potential - University of Pretoria: department of historical and heritage studies

Abstract:

The potential of cross-border tourism is a well-established phenomenon in that it multiplies the socio-economic effects in bordering regions. Essentially it promotes the integration of value chains, augments investments and increases tourist flows to a broader and more inclusive region. It also allows for the linking of a number of related tourist attractions into a themed experience which attracts the niche tourist with particular needs. Key to these themed tourist routes is the experiential element which creates meaning for the potential tourist. The report acknowledges that cross-border themed tourism routes are not without their challenges at a number of levels. These include aspects such as the non-alignment of the tourist guiding sectors; the discrepancies in tourism rankings; varied facilities and infrastructures; obstructive regulatory systems; safety concerns; global competitiveness; different currencies; and lack of collaboration. However, it is argued that some of these do have short term mitigations as well as long term solutions which could enable the practice of cross-border themed tourism routes. These can be addressed through: collaboration and partnership; diplomacy and supranational agreements; single regional and regionally accepted currency; investment; harmonisation of visas; harmonisation of

standards; and experience diversification. Furthermore, best practice examples indicate that cross-border route experiences have been more successful with the implementation of smaller developmental projects where only a few countries are traversed. Here the enabling environment and collaborative practices have been aligned to suite the specific route. The report argues that Southern Africa has vast potential for cross border themed route experiences and proposes the development of a CBTRE Toolkit which the sector could utilise to creatively diversify the experience dimension of the tourist offering. The report maps out a range of potential avenues of collaborative themed route experiences within the Southern SADC region concluding with an example from film tourism and the case of Black Panther.

6.4 Indigenous Story Tellers (ISTs): Northern Cape as a case study - University of Pretoria: department of historical and heritage studies

Abstract:

In recent years storytelling has gained increasing attention as a global marketing trend and development tool in the tourism industry. Studies have shown that a “real” or “fictive” story associated with a destination or its peoples has the distinct ability to give the specific area an advantage over its competitors, while still simultaneously providing the tourist with a more valuable and

“unique” experience. This essentially means marketing domestic and international tourist destinations as “story-scapes” through the interaction between all stakeholders, including story tellers, tourist guides and tourists. This capitalises on the tourist’s adherent need for a more authentic story behind the tourism product, along with the tourist’s interest of how this “unique” story was acquired, created and then ultimately conveyed in an understandable and meaningful way. This project explored the viability and practicality of considering and incorporating the “Indigenous Story Teller” (IST) into the wider tourist guiding sector of South Africa. It recommends the creation of a new tourist guiding classification to add to the established three levels of tourist guiding already regulated and monitored within the country. It suggests the possible addition of a unit standard which will enable the culture guide to facilitate and provide a platform for the inclusion of the IST in the tourism sector. Culture guides will therefore be elevated to a position where they are enabled to facilitate the inclusion of the IST in the tourism offering and mediate between the IST and the tourist group as an intercultural communicator. They will also need to play the role of a conservator in ensuring that the IST and his/her landscape is preserved, respected and not damaged. In the case study of the Northern Cape the report illustrates that the concept IST refers to a diverse collection of local voices that contribute to the authenticity and integrity of a particular tourist attraction. This model can also be applied generically throughout South Africa with the range of indigenous and marginalised



voices that abound. In essence, in this role, the cultural tourist guide becomes a co-creator of the IST experience.

6.5 Panthers and Places: Filmic representation and destination image - University of Pretoria: department of historical and heritage studies

Abstract:

This paper is part of a larger Master's thesis in Heritage and Cultural Tourism at the University of Pretoria. The purpose of this multi-disciplinary study is to investigate the influence of popular media representations, specifically film and television, on narratives of place and tourist destination image. The study explores the relationship between narratives or stories about certain places and the ultimate images that they create in the minds of potential publics before tourist visitation. These narratives or stories in the form of a popular media, such as film or television, can be seen as forms of autonomous knowledge that familiarises a place, its culture and associated characteristics to potential tourists, consequently making it an option for travel. The study is grounded in a growing body of literature on the phenomena of 'film tourism' or 'popular media induced tourism' and 'filmic place branding'. From an initial global perspective, the paper reflects on a number of associated characteristics that are conceptually mapped to the landscape of continents, countries and cities. These characteristics can be

seen as forms of cultural capital that entice potential tourists and is represented in a number of filmic genres or styles, in both the global north and south, such as Hollywood, Bollywood and Nollywood. This information is then ultimately adapted and applied to an African, South African and Johannesburg environment by reflecting on films that depict the continent, country and city in specific ways and the constructions or images that they create. It further considers the potential and ability of South Africa and other African countries to capitalise on the cultural products represented in the major Hollywood blockbuster films, such as the Black Panther (2018), to present a narrative for landscapes and places and ultimately laying claim to cultural products and inspiring tourist interest.

6.6 Development of a framework to assess the economic impact of coastal and marine tourism in South Africa: Survey findings and implications - University of KwaZulu-Natal

Abstract:

Coastal and Marine Tourism (CMT), as part of the oceans economy, offers significant development opportunities that can contribute to job creation and sustainability. However, a desktop study funded by the Department of Tourism revealed that there are limited national and international best practices to assess the economic impacts of CMT. To examine the economic impacts of CMT in

South Africa, surveys were implemented with demand-side (tourists/ users/ customers) and supply-side (the accommodation sector, CMT business owners, retail outlets and tour operators) coastal and marine stakeholders. This presentation presents the descriptive analysis of survey results from key stakeholder groups. The results are used for the economic modelling as well which used the Input-Output (I-O) model and Tourism Satellite Account (TSA) approaches. A proportionate targeted sampling approach was used to survey 3 031 tourists/ users/ customers, 125 accommodation establishments, 125 restaurants and retail outlets, 94 CMT business owners and 66 tour operators. The surveys were undertaken in KwaZulu-Natal, Western Cape and Eastern Cape. CMT locations in these provinces were purposively chosen and persons systematically selected. The demographic profile of tourist/ user/ customer respondents indicate diversity in terms of gender and historical racial groups with most having post-matric qualifications and having higher than average incomes. The majority of these respondents were also overnight and day visitors. The majority of respondents participated in in multiple CMT activities. This shows high levels of interest in CMT products/activities. CMT locations also have repeat visitors and attract new visitors. There were also high levels of satisfaction among visitors with CMT activities and experiences. Most respondents spent on food and drinks and travel. The highest average spend by tourists was for travel and accommodation during visit to South Africa. Shopping as well as food and drinks also had relatively high average spend. In terms of the supply-

side stakeholder key findings, most of these businesses were operational for more than 10 years. The months regarded as high and low season were similar for all stakeholders with occupancy rates/ number of clients and average spend per client rates being substantially higher during high compared to low seasons. Research challenges were noted, especially in relation to undertaking fieldwork in Northern Cape and interviewing supply-side stakeholders. These issues were also raised during the piloting phase of the research. Differences were noted in terms of expenditure patterns among the stakeholders. However, the highest average expenditure was generally for salaries/ wages followed by capital expenditure. In terms of use of service providers/ suppliers, the highest was for restaurants and retail establishments followed by tour operators and accommodation establishments. Among all the stakeholders who used service providers, most were locally-based which indicates support for local businesses which is a key component of the transformation agenda. However, few service providers were identified as being black or female-owned. In relation to employment trends, the results show that accommodation establishments employed the most staff and CMT businesses the least. Most staff were locally-based. No discernible gender differences emerged. Africans are employed the most in many businesses which is important given that this is the main equity target group. The importance of developing a standardised framework to measure, monitor and manage the economic impacts of CMT in South Africa remains. This research will inform the development of a framework for CMT.



7. NATIONAL TOURISM RESEARCH AGENDA

The National Tourism Research Agenda was developed with the intention to serve as a framework to guide both current and future tourism research priorities in order to inform policy, planning and decision-making in the tourism sector. The Research Agenda consist of a list of research studies or needs which were received from various stakeholders in the tourism sector and provides a vision of where research can contribute to critical areas geared to grow and develop the tourism sector. This document is by no means comprehensive or exclusive, but should be viewed as a strategic document that will be reviewed and updated on regular basis in order to respond to new developments and priorities within the Department and the tourism sector.

The Research Agenda therefore seeks to:

- identify existing knowledge and gaps in the area of tourism research;
- prioritise research themes and focus areas to guide tourism research;
- align research efforts from various tourism stakeholders;
- create an opportunity for future research collaboration between various tourism stakeholders; and
- enhance research capacity within the tourism sector.

Various stakeholders within and outside the tourism sector,

including, institutions of higher learning, government departments (national and provincial), tourism authorities and associations, and research institutions participated in the development of the Research Agenda. The National Tourism Sector Strategy (NTSS) identifies research as a critical area for the development and growth, and encourages building collaborative partnerships to advance tourism research for the sector. The Strategy further points out that tourism is a cross functional sector which requires collaboration and cooperation with other stakeholders.

The Department encourages stakeholders to collaborate when conducting tourism research as this could assist to strengthen capacity with the required areas of expertise, and in turn limiting research duplications and wastage of resources. Students who are enrolled for post-graduate studies are also encouraged to consult the Research Agenda when conceptualising their research studies. This approach will assist students to make meaningful contribution to the sector.

As part of the annual review and updating of the Research Agenda, stakeholders are requested to submit their research needs and priorities to the Department. Moreover, stakeholders interested in undertaking the research studies in the Research Agenda are requested to indicate their area of interest as this will assist the Department to keep track of the studies being conducted. For information sharing purposes, stakeholders

are also requested to provide the Department with a list of completed tourism or tourism related research studies conducted in their organisations. This information and any matters related to the Research Agenda should be sent to: Ms Harriet Mukwevho at hmukwevho@tourism.gov.za.

Table 2: National Tourism Research Agenda

RESEARCH THEME	RESEARCH FOCUS AREA	PROPOSED RESEARCH TOPICS
1. Coastal and Marine Tourism	<ul style="list-style-type: none"> ■ Coastal and marine tourism from a global perspective ■ Coastal and marine tourism's economic valuation and analysis ■ Coastal and marine tourism and the environment ■ Coastal and marine tourism policy developments and guidelines ■ Coastal and Marine Tourism and tourism development/performance ■ Coastal and Marine Tourism and Innovation 	<ul style="list-style-type: none"> □ Marine and coastal tourism: Lessons learned from other countries □ The economic value of coastal and marine tourism □ The contribution of coastal and marine tourism in the Small, Medium and Micro-Enterprise (SMME) development within the tourism sector □ The impact of coastal and marine tourism on the environment □ Security risks and measures necessary for the coastal and marine tourism □ The role of infrastructure improvement and enhancement along coastlines for coastal and marine tourism development □ Exploring coastal and marine tourism initiatives/programmes to stimulate and create jobs in the sector □ Exploring different innovative platforms to increase experiences in coastal and marine tourism □ Community involvement and beneficiation in coastal and marine tourism □ Investigation of sustainable tourism through the promotion of ecotourism in coastal and marine protected areas □ Development of a framework to assess the economic impact of coastal and marine tourism in South Africa – Phase (3) – in progress





RESEARCH THEME	RESEARCH FOCUS AREA	PROPOSED RESEARCH TOPICS
2. Employment and Decent work	<ul style="list-style-type: none"> ■ Employment patterns in the tourism sector ■ Employment dynamics ■ Skills development ■ Transformation ■ Women in tourism ■ Job creation 	<ul style="list-style-type: none"> □ Assessment of factors underlying employment generation in the tourism and hospitality sector □ Investigate the tools and models for measuring employment and decent work □ Measuring the quality of work and impact on local communities □ Evaluation of working conditions in the tourism and hospitality sector □ Assessment of work integrated learning and tourism in higher education □ Human resource development in the tourism sector □ Assessment of training needs and programmes for professional tourist guides □ Matching the skills supply and needs of the private sector □ Understanding the employment profiles within the tourism hospitality sub-sector: restaurants – in progress
3. Responsible Tourism	<ul style="list-style-type: none"> ■ Responsible tourism practices ■ Tourism performance and the environment ■ Community-based tourism ■ Sustainable tourism practices 	<ul style="list-style-type: none"> □ Factors affecting the implementation of the responsible tourism management practices □ Interventions needed to improve the number of enterprises that embrace responsible tourism management practices □ The attitudes and perceptions towards responsible tourism practices within SANParks and its tourists, concessionaires and service providers □ The effect of climate change on South Africa as tourism destination □ The implementation of responsible tourism projects within local communities □ Constraints and opportunities for community participation and development management □ Evaluation of responsible tourism business models that generate economic benefits for local communities □ Exploring tourism marketing platforms for travellers with disabilities □ The synergies created with sustainable tourism practices and ecotourism (ecological preservation) □ Universal accessibility and affordability within the tourism sector □ Assessment of factors affecting the sustainability of adventure tourism

RESEARCH THEME	RESEARCH FOCUS AREA	PROPOSED RESEARCH TOPICS
4. Enterprise Development	<ul style="list-style-type: none"> ■ Entrepreneurship and enterprise development ■ Tourism value chain and enterprise development ■ Competitiveness of tourism enterprises ■ Sustainability of tourism enterprises 	<ul style="list-style-type: none"> □ SMME development and transformation in the tourism sector □ Entrepreneurship in the creative industry (arts and craft, curio shop etc.) □ The role of private, public partnership on SMME development □ Investigating the lack of private investors (banks, venture capitalists & angel investors) in tourism SMMEs □ Understanding business failure of tourism SMMEs □ Identifying growth opportunities offered by markets and by large enterprises to SMMEs in tourism □ Unpacking the business linkages for SMMEs in the global tourism value chains and networks □ Service quality and standards adherence by black owned SMMEs □ Competitiveness of black owned SMMEs □ Examining where the money goes in the various tourism sub-sectors □ Skills transfer and empowerment to develop local businesses □ Utilising integrated marketing communication to create brand recognition and sales □ The sustainability issues for new entrants into the tourism sector □ An analysis of socio-economic opportunities in the tourism value chain – in progress □ Leveraging State-owned tourism assets for black Small, Medium and Micro Enterprises development: a case of state owned parks, lodges and attractions – in progress





RESEARCH THEME	RESEARCH FOCUS AREA	PROPOSED RESEARCH TOPICS
<p>5. Policy, legislative and regulations</p>	<ul style="list-style-type: none"> ■ Regulatory environment and strategic interventions ■ International accessibility and entry requirements ■ Safety and security and the tourism sector ■ Investment and regulatory reform 	<ul style="list-style-type: none"> □ Unintended consequences created by the introduction of the immigration regulations □ The impact of immigration policies on tourism performance □ Impact of outbreak of diseases, political and economic developments on tourism □ Assessment of entry/visa requirements in other countries □ The role of South African embassies on tourism performance □ Analysis of the successes and failures of the incentive programmes □ Analysis of the programme design flaws and contradictions in economic and fiscal policy □ Innovative design in incentive programmes for tourism □ The linkages of the incentive programmes with other programmes of a government □ The application of tourism incentive programmes to other policy aspects targeted at the tourism sector, e.g. tourism grading, universal accessibility, responsible tourism, adventure tourism, etc.
<p>6. Destination development</p>	<ul style="list-style-type: none"> ■ Measuring tourism sector in South Africa ■ Product development and promotion ■ Tourism and socio-economic development ■ Tourism experience management ■ Tourist segmentation ■ Innovation and competitiveness of destinations 	<ul style="list-style-type: none"> □ An assessment of the impact of mega trends in the tourism sector – in progress □ Model to measure the size of the tourism economy □ Development of consumer behaviour model □ Assessment of visitor profiles and needs □ Econometric model for tourism demand in South Africa □ Gap analysis on tourism product offerings and visitor experiences □ Identification of new tourism initiatives for sector development □ Residents attitudes and support for tourism development □ The role of public private partnership in tourism development □ Opportunities for tourism in protected areas □ Tourist perceptions of trails, facilities and interpretive experiences in parks

RESEARCH THEME	RESEARCH FOCUS AREA	PROPOSED RESEARCH TOPICS
	<ul style="list-style-type: none"> ■ Tourism infrastructure, maintenance and development ■ Marketing and communication channels ■ Travel intermediaries and tourism performance ■ Urban regeneration and tourism performance ■ Emerging global trends ■ Niche tourism ■ Pricing (locally and internationally) 	<ul style="list-style-type: none"> □ The role of the three spheres of government in tourism development and growth □ A market mapping of businesses involved in adventure tourism in South Africa □ An economic assessment of adventure tourism in South Africa □ An analysis niche tourism sectors at provincial levels □ Slow tourism as a marketing tool in developing destinations □ Assessment of economic viability of wine and cuisine tourism □ Development of township tourism □ Cross-Border themed tourism routes in the Southern Africa region – practice and potential – in progress □ Indigenous Story Tellers (ISTs): Northern Cape as a case study – in progress □ Growing tourism through the entertainment industry (film, casinos etc.) □ Diaspora tourism: measurement of the scope and patterns of diaspora visits to friends and relatives in South Africa □ The role of the different entities in tourism value chain □ Assessment of the nature/structure of tourism supply and value chains □ Integration of the supply chain principles to create and communicate a common tourism vision □ Impact of events on tourism performance and the economy □ Value of the exhibition industry and its contribution towards tourism performance □ Assessment of South Africa's potential to host new international events □ Assessment of return on investment from event infrastructure development and sustainability analysis □ Market segmentation and visitor satisfaction of small scale specialised events



RESEARCH THEME	RESEARCH FOCUS AREA	PROPOSED RESEARCH TOPICS
		<ul style="list-style-type: none"> <input type="checkbox"/> The impact of national, provincial and local trade shows on tourism business performance <input type="checkbox"/> Aviation capacity in South Africa and future demand to meet tourism growth <input type="checkbox"/> Development of land transport to meet tourism growth <input type="checkbox"/> Ecotourism in urban environment and management of multi tourism activities <input type="checkbox"/> Impact of urban dilapidation on tourism performance and growth <input type="checkbox"/> Accessibility of domestic tourism <input type="checkbox"/> Assessing product and information communication systems in the tourism sector <input type="checkbox"/> Product development and packaging through strategic partnerships <input type="checkbox"/> The nature and roles played by various travel intermediaries in different markets to improve tourism performance <input type="checkbox"/> Understanding the target market for cultural heritage tourism in national parks <input type="checkbox"/> Evaluation of heritage tourism products in national parks <input type="checkbox"/> Development of new culture and heritage tourism products in national parks <input type="checkbox"/> Best practice for visitor management in open parks <input type="checkbox"/> Understanding the halaal market: opportunities and challenges in South Africa <input type="checkbox"/> Assessment of return on investment for tourism facilities implementing universal accessibility in infrastructure development <input type="checkbox"/> The impact of air transport on the tourism sector: an economic aspect <input type="checkbox"/> Tools to improve marketing efficiency and effectiveness in tourism at different tourist destinations <input type="checkbox"/> Optimising “White elephants”- how local businesses can make utilise the tourism products <input type="checkbox"/> Cultural heritage products and contribution to tourism development

RESEARCH THEME	RESEARCH FOCUS AREA	PROPOSED RESEARCH TOPICS
7. Service Excellence	<ul style="list-style-type: none"> ■ Service quality in tourism sub-sectors ■ Service management in the tourism sector ■ Memorable tourist experience ■ Tourist satisfaction and tourism infrastructure ■ Tourist satisfaction and sustainable tourism businesses ■ Measuring service delivery 	<ul style="list-style-type: none"> □ Development and application of quality assessment tools relevant to tourism sub-sectors □ Development of a tourist satisfaction model to enhance sustainable tourism businesses □ The relationship between various aspects of customers' perception of service quality and measures of business performance □ Application of different service management models to specific businesses and leisure tourism segments □ Development of visitor experience model within the South African tourism context □ Assessment of customer satisfaction within hospitality sectors (restaurants, accommodation etc.) at ports of entry □ Impact of product quality and service delivery – how can South Africa be positioned as a high-value destination
8. Knowledge Economy	<ul style="list-style-type: none"> ■ Innovation and technology in the tourism Sector ■ Social Media platforms to promote and create awareness in the tourism sector ■ E-Marketing tools used to promote destinations ■ Information Communication Technology (ICT) and the tourism sector 	<ul style="list-style-type: none"> □ The use of social media and user-generated content in tourism at different destinations □ Examining the implications and approaches of social media in the tourism sector □ Analysis of information search behaviours of visitors to South Africa □ Impact of internet and virtual reality on visitor needs and expectations □ Marketing of tourism destinations and tourism businesses via e-marketing, social media and user-generated content □ The role of innovation on the competitiveness of destinations in South Africa □ The level of innovation in tourism for South Africa to compete globally

8. COMPLETED RESEARCH STUDIES: 2012 TO 2018

The table below shows the research studies that were previously conducted and completed in collaboration with the universities between 2012/13 and 2017/18.

**Table 3: Completed research studies (available on the knowledge portal:
<https://tkp.tourism.gov.za/Research/researchpapers/Pages/default.aspx>)**

University	FY 2012/13 (research project title)	FY 2013/14 (research project title)	FY 2014/15 (research project title)	FY 2015/16 (research project title)	FY 2016/17 (research project title)	FY 2017/18 (research project title)
University of Pretoria - Department of Tourism management	Analysis of the supply of tourism products for the five key domestic market segments	A model to measure South Africa's tourism competitiveness (phase one)	A model to measure South Africa's tourism competitiveness (phase two)	Regional competitiveness: an emerging domestic market segment perspective	Destination development through understanding tourists' expectations and memorable tourist experiences at major tourist attractions	Demand and Supply Market analysis for Destination Development

University	FY 2012/13 (research project title)	FY 2013/14 (research project title)	FY 2014/15 (research project title)	FY 2015/16 (research project title)	FY 2016/17 (research project title)	FY 2017/18 (research project title)
University of Pretoria - Department of Historical and Heritage studies	Understanding the concept of cross-border guiding in Southern Africa	Harmonisation of tourist guiding training regulations and standards in Southern Africa (phase one)	Harmonisation of tourist guiding training standards in Southern Africa (phase two)	Harmonised tourist guiding in Southern Africa	The potential of the creative industry for destination development in South Africa-film tourism as a case study	A policy Review of the Tourist Guiding sector in South Africa
University of Venda	Socio-economic impact of sporting events on rural communities: a case study	The socio-economic impact of religious tourism on rural communities in Limpopo: a case study (phase one)	The socio-economic impact of religious tourism on local communities in Limpopo: a case study (phase two)	Local economic development: the case of tourism events	Interventions and incentives needed to improve the number of enterprises, including state-owned tourism attractions that embrace responsible tourism management practices	Sustainability of Rural Tourism Products in South Africa: A Hypothetical Application

University	FY 2012/13 (research project title)	FY 2013/14 (research project title)	FY 2014/15 (research project title)	FY 2015/16 (research project title)	FY 2016/17 (research project title)	FY 2017/18 (research project title)
University of Johannesburg	Customer service satisfaction levels of domestic tourists at accommodation establishments in South Africa	Customer service satisfaction levels at tourist attractions in South Africa (phase one)	customer service satisfaction levels at tourist attractions in South Africa (phase two)	customer service satisfaction index for the accommodation sub-sector in South Africa	Tourism value chain and opportunities for transformation in South Africa	
Cape Peninsula University of Technology	Governance and regulation of subvention funds study	Development of a framework to measure the impact of events (phase one)	Development of a framework to measure the impact of events (phase two)	Development of a framework to measure the impact of events- (phase three)	Development of a framework to assess the economic impact of coastal and marine tourism in South Africa (phase one)	
University of Zululand (from 2012/13 to 2013/14) University of KwaZulu-Natal (from 2015/16 to 2016/17)	Socio-economic impact of rural tourism routes on adjacent communities: a case study	The planning, development and management of tourism resource facilities and activities in municipalities in three provinces		The impact of community-based tourism projects on local communities in KwaZulu-Natal	The governance and coordination involved in coastal and marine tourism: challenges and opportunities	Development of a framework to assess the economic impact of Coastal and Marine Tourism (CMT) in South Africa: phase 2

9. CURRENT RESEARCH STUDIES: 2018/19

Table 4: Current research studies: 2018/19

NO:	RESEARCH TOPIC	UNIVERSITIES	CONTACT DETAILS
1.	An assessment of the impact of mega trends in the tourism sector	University of Pretoria: Department of Tourism Management	Prof Berendien Lubbe berendien.lubbe@up.ac.za Prof Anneli Douglas anneli.douglas@up.ac.za
2.	Indigenous Story Tellers: Northern Cape as a case study	University of Pretoria: Department of Historical and Heritage Studies	Prof Karen L Harris karen.harris@up.ac.za
3.	Cross-Border themed tourism routes in the Southern Africa region – practice and potential	University of Pretoria: Department of Historical and Heritage Studies	Prof Karen L Harris karen.harris@up.ac.za
4.	The public sector event tourism value chain and equity redress in South Africa	University of Venda	Ms Tondani Nethengwe-Madzunye Tondani.Nethengwe@univen.ac.za
5.	Leveraging State-owned tourism assets for black small, medium and micro enterprises development: a case of state owned parks, lodges and attractions	University of Johannesburg	Dr Diane Abrahams dabrahams@uj.ac.za Prof Tembi Tichaawa tembit@uj.ac.za
6.	Development of a framework to assess the economic impact of coastal and marine tourism in South Africa – Phase 3	University of KwaZulu-Natal	Prof Urmilla Bob Bobu@ukzn.ac.za

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