



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

TOURISM RESEARCH AGENDA 2021/22 – 2023/24

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1. INTRODUCTION

The National Tourism Sector Strategy (NTSS) identifies research as a critical area for the development and growth of the tourism sector and emphasises the important role research plays to guide planning and decision making. Guided by evidence-based research, the tourism sector would be able to develop and implement policies, strategies, programmes, interventions and decisions to meet the needs and expectations of different stakeholders within the sector. In line with the NTSS and other strategic documents, the Department developed a three (3) year, 2021/22 – 2023/24, research agenda to serve as a framework to identify and inform future tourism research priorities and needs, with a view to inform policy, planning and decisions making as well as departmental strategies, programmes and interventions.

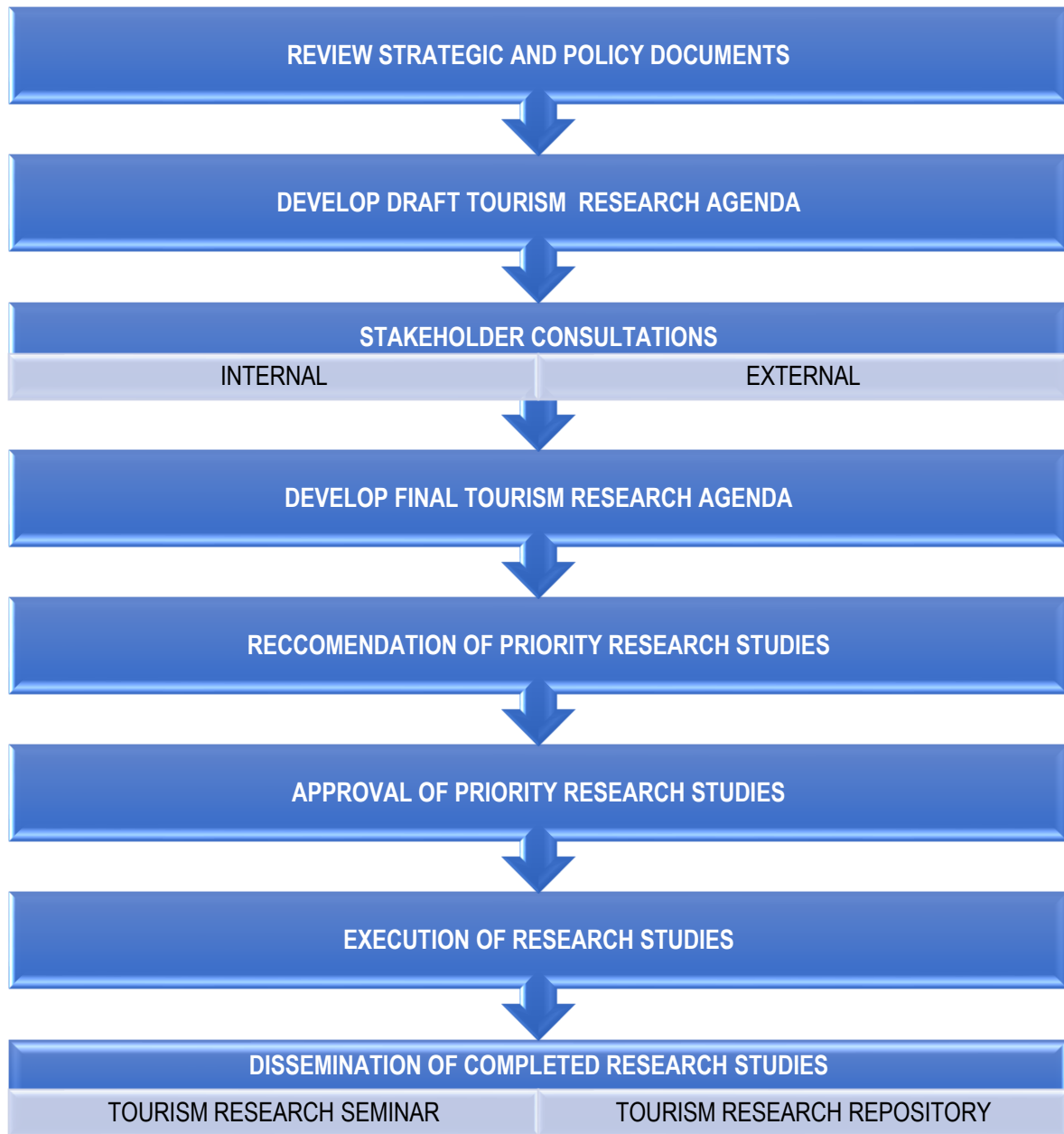
2. OVERVIEW OF THE TOURISM RESEARCH AGENDA

The Tourism Research Agenda aims to outline a framework for making decisions about current and future research priorities and it therefore seeks to:

- identify existing knowledge and gaps in tourism research;
- prioritise research themes and focus areas;
- align research efforts from various tourism stakeholders; and
- create an opportunity for future research collaboration between various tourism stakeholders.

Several policy documents such as the NTSS, Tourism Sector Recovery Plan, Economic Reconstruction and Recovery Plan, Green Paper, etc, are considered in the process of compiling the Research Agenda. In addition, internal stakeholders within the Department and external stakeholders are also engaged and consulted to provide research needs inline with the national priorities, programmes and interventions. The process followed in developing and implementing the Research Agenda is outlined in section 2.1.

2.1 Tourism Research Agenda Process Flow



2.2 Priority Research Themes: 2021/22 – 2023/24

The following research themes were prioritised for the 3 year period, 2021/22 to 2023/24:

- Revolutionising Domestic Tourism;
- Tourism Sector Demand and Supply;
- Transformation and Tourism Value Chain;
- Tourism and Transport Interface;
- Tourism Safety; and
- Tourism and Technological Innovation.

Table 1: 2021/22 – 2023/24 Research themes and research areas

RESEARCH THEME	OVERVIEW/CONTEXT	PROPOSED PURPOSE/OBJECTIVE
Revolutionising Domestic Tourism	Domestic tourism is particularly regarded as a beacon of hope to aid recovery post COVID-19. This assertion is due to the fact that domestic tourism market is viewed as being crucial to offset drops in international tourism arrivals during crisis and off-peak periods. Revolutionising domestic tourism therefore requires innovative paradigm shift by examining impacts, reassess business practices and models, diversification of tourism products and centralise domestic tourism in future strategies and plans.	Explore ways to diversify domestic tourism products in order to improve competitiveness and potentially address the issues relating to geographic spread and seasonality.
		Assess why are South Africans not traveling with a focus on developing potential price differentiations strategies as tools for stimulating domestic travel.
		Investigate market segmentation in the domestic market with a view to develop strategies for segments with potentially high revenue.
		Explore the role of government-owned products to expand access and facilitate affordability for South Africans in lower-income groups.
		Unlocking tourism potential in municipal border towns: challenges and opportunities for local economic development.

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<p>Tourism Sector Demand and Supply</p>	<p>The onset of the COVID-19 pandemic signalled the evolution of tourist behaviour - as tourists adapt to 'the new normal', suggesting that tourism practitioners and enterprises need to be cognisant of the changes in tourist behaviour, as well as be proactive and reflexive to meet the evolving contemporary tourist demands and preferences effectively with suitable supply. These indicates the need for a significant and possibly radical paradigm shift in the delivery of tourism products.</p>	<p>Investigate tourism demand and supply within the private sector tourism value chain with a view to improve participation of emerging black-owned tourism enterprises.</p>
		<p>Investigate how national tourism quality standards and structures can be enhanced for improved customer satisfaction and experience.</p>
		<p>Assess the feasibility of establishing partnerships to improve compliance with the grading framework amongst participants.</p>
		<p>Assess niche tourism offerings that should be developed to inculcate the culture of travel for South Africans.</p>
		<p>Explore investments in to rural tourism corridors and routes with high tourism potential.</p>
		<p>Develop tourism crisis management frameworks to enable the destination to manage and respond to crises.</p>
		<p>Monitor emerging market trends out of crisis and explore new products in line with available resources.</p>
		<p>Develop a framework for improved reporting by accommodation, transport and other platform enterprises within the sector tourism to ensure access to relevant information on services provided in South Africa.</p>

RESEARCH THEME	OVERVIEW/CONTEXT	PROPOSED PURPOSE/OBJECTIVE
		<p>Assess the extent to which COVID-19 has impacted the MICE sub-sector with the aim to propose practical interventions and strategies for the recovery of the sub-sector.</p> <p>Explore how the powers of the registrar can be strengthened to review the overall process of administration of tourist guiding to include registration of tour operators, travel agents, accommodation, and attractions.</p> <p>Investigate the barriers for growth in the guiding sector and to identify opportunities to implement targeted interventions to ensure meaningful/sustainable participation of black guides in the tourism sector.</p> <p>To integrate and recognise the Indigenous Story Tellers (ISTs) within the tourist guiding domain.</p> <p>Assess the need to implement renewable energy infrastructure to ensure that South Africa is recognised as embracing a vision for a low carbon economy, particularly within the tourism sector.</p> <p>Determine the contribution of the tourism sector to national greenhouse gas (GHG) emissions.</p> <p>Assess the environmental legislation compliance of capital projects funded by government – environmental authorizations and compliance.</p>

RESEARCH THEME	OVERVIEW/CONTEXT	PROPOSED PURPOSE/OBJECTIVE
		Assess the development and functioning of community owned enterprises for entry into the tourism value chain.
Transformation and tourism value chain	<p>Transformation has far-reaching effects, not only in recrafting balance in the business and opportunity landscapes, but for local communities and previously disadvantaged groups. The COVID-19 pandemic has had profound impact on the entire tourism value chain in South Africa. The complete or partial shutdown of travel and tourism activities during lockdown resulted in the disruption of generation value and income for the sector. There is a need to stimulate and revitalise the sector and position the tourism value chain on a trajectory that focuses specifically on an inclusive, robust and sustainable recovery of the sector.</p> <p>Despite the implementation of energy, water efficiency and universal access programmes in South Africa, scope remains for the mainstreaming of responsible Tourism practices throughout the sector. The upfront cost of assessing and implementing modifications to operations to achieve resource efficiency may be prohibitive for small enterprises.</p>	<p>Unpack barriers that remain restraint for Small, Medium and Micro Enterprises (SMMEs) to access finance and markets and thus impeding their growth and development.</p> <p>Trend analysis of the operating environment for SMMEs post COVID – 19 and amidst prevailing global and local power crises and natural disasters.</p> <p>Mapping of new business opportunities and emerging sub sectors within the tourism value chain to inspire new innovations and entrepreneurial development.</p> <p>Unpack barriers that remain restraint for SMMEs to access finance and markets and thus impeding their growth and development.</p> <p>Determine the impact of electricity crisis on tourism SMMEs and strategies to mitigate the impact thereof</p> <p>Investigate how mechanisms for access to finance by SMMEs can be strengthened to promote transformation.</p> <p>Develop frameworks for concessions to promote transformation through the use public owned tourism assets</p>

RESEARCH THEME	OVERVIEW/CONTEXT	PROPOSED PURPOSE/OBJECTIVE
		Develop mechanisms to recognise comprehensive internal skills development programmes within the sector with the objective of more inclusive upward mobility of employees.
		Develop an enterprise framework to enable the advancement of the skills base of SMMEs in the sector outlining the contribution of both public and private sector role-players.
		Investigate how the transformation framework for the sector can be improved to better incorporate previously disadvantaged groups.
		To explore/investigate how rural tourism may be leveraged for sector recovery/ to enhance visitor experiences/ create socioeconomic opportunities for rural communities.
	Sector has inadequate skills' supply to meet industry needs as a result of poor conceptualisation of skills needs in the sector, which results in poor training of learners. Inadequate opportunities for internships, learnerships, coaching and mentorships, whilst some are unregulated for quality and relevance purposes.	Review of the secondary and tertiary education curriculum and approach to tourism training to better incorporate intrinsic skills relevant to industry needs and to align with changing skills demands due to technological innovation and digitalisation.
		Leveraging technology to scale up ease of access to affordable and ongoing learning.
		Positioning tourism as a viable career within communities and fostering a greater understanding of the utility of service skills that the sector helps to develop long-term personal growth.

RESEARCH THEME	OVERVIEW/CONTEXT	PROPOSED PURPOSE/OBJECTIVE
		<p>Review of the secondary and tertiary education curriculum and approach to tourism training to better incorporate intrinsic skills relevant to industry needs and to align with changing skills demands due to technological innovation and digitalisation.</p> <p>Explore the recognition of apprenticeship-linked employment of new entrants to the sector.</p>
Transport and Tourism Interface	<p>South Africa has many transport networks which are disproportionately located across the country, which presents a number of obstacles in tourist flows. More importantly, the limited number of gateways and hubs for local and international tourists suggests that the tourism-transport interface potential in the country is not yet fully harnessed.</p> <p>Challenges exist regarding fundamentals of traveller accessibility including the need for enhanced ease of travel facilitation for visa requiring growth tourism markets, lack of coherent approach to air access facilitation & air service development for the country, limited air and land infrastructure to support accelerated air travel.</p> <p>prism.</p>	<p>To identify and examine the type and quality of transport services on offer to tourists that are critical to enhance South Africa's attractiveness and competitiveness in the post-/continuing environment of COVID-19.</p> <p>Investigate how visa requirements can be reduced for key growth source markets in collaboration with immigration authorities and introduce e-visa processes & other digital operations where appropriate.</p> <p>Assess the feasibility of establishment of a nationally driven air access strategy for the coordination and support of air service for tourism growth.</p> <p>Analysis of economic and transport infrastructures in in order to inform investment cases for tourism</p>
Tourism Safety	<p>The country's image is negatively affected by crime involving tourists & high levels of crime reported broadly in the destination. This negatively impact desire to visit South Africa by international tourist & a</p>	<p>Investigate crime impacting tourists in high tourist areas using the combined efforts of stakeholders, communities, law enforcement agencies, the justice system and technology security advances.</p>

RESEARCH THEME	OVERVIEW/CONTEXT	PROPOSED PURPOSE/OBJECTIVE
	deterrent to self-drive domestic tourists. There is a need to understand and actively manage the impacts of crime on tourism.	<p data-bbox="1317 245 2056 411">Investigate the establishment of a specialised police unit with capacity for focused preventative measures and the swift resolution of incidents involving tourists</p> <p data-bbox="1317 416 2056 496">Assess the feasibility to establish a Tourist Police in South Africa.</p>
Tourism and Technological Innovation	Technological advancements have affected the global economy in various ways. Digitalisation in tourism has created new marketplaces and models for travel and accommodation. Existing policy and regulatory frameworks are misaligned with current technological developments and the advent of platform enabled short-term rental colloquially referred to as sharing economy. There is also insufficient sharing of information in this emerging and unregulated part of the sector, and therefore critical tourism data to inform policy decision-making is unavailable.	<p data-bbox="1317 517 2056 635">Develop a framework for holistic digital integration of the tourism workforce and enterprises incorporating innovation opportunities.</p> <p data-bbox="1317 639 2056 847">Develop structured awareness and skills programmes targeted at the youth to increase the understanding and access to new career and entrepreneurship opportunities arising from current and future technological advancements.</p> <p data-bbox="1317 852 2056 1018">Establish a differentiated system for the regulation of short-term rental accommodation and other emerging platform industries and enterprises to be established.</p>

2.3 Priority Research Studies – 2023/24

The following research studies have been prioritised by the Department to be conducted in the 2023/24 financial year.

Table 2: 2023/24 research studies

RESEARCH THEME	FOCUS AREA	PURPOSE/OBJECTIVE
Tourism Sector Demand and Supply	Tourism grading	To investigate the perceived impacts of the grading system on accommodation establishments' service quality improvement and performance changes in South Africa.
	Tourist Guiding	To understand the barriers for growth in the guiding sector and to identify opportunities to implement targeted interventions to ensure meaningful/sustainable participation of black guides in the tourism sector.
		To explore the integration and recognition of ISTs within the tourist guiding domain.
Transformation and Tourism Value Chain	SMME development	To review of development needs of SMMEs post COVID – 19, with a focus on finance and market access.
		To identify new business challenges and opportunities within the tourism value chain and inspire new innovations and entrepreneurial development.
		To determine the impact of electricity crisis on tourism SMMEs and strategies to mitigate the impact thereof.
Tourism Safety	Tourist Police	To assess and understand the environment within which a Tourism Police should exist, and determine the resources needed to establish and operationalise a successful Tourist Police in South Africa.

2.4 Completed Priority Research Studies: 2021/22 – 2022/23

The table below highlights the research studies that were conducted and completed on the current priority research themes.

FOCUS AREA	RESEARCH TOPIC	YEAR COMPLETED
Revolutionising Domestic Tourism	Piloting and refinement of the Domestic Tourism Remodelling Model.	2022/23
	Piloting and refinement of Domestic Tourism Recovery Framework.	2022/23
	Re-modelling the local domestic tourism market in South Africa within a COVID-19 environment.	2021/22
	Re-examining perspectives on the recovery of South Africa's domestic tourism in a COVID-19 environment.	2021/22
Transformation & Tourism Value Chain	Transformation of South African tourism value chain towards sustainable and resource efficient, and inclusive growth path post covid-19.	2021/22
	Enabling small, medium and micro enterprises (SMMES) survival and growth during/post COVID-19.	2021/22
Tourism Sector Demand and Supply	Piloting and refinement of the tourism resilience model.	2022/23
	Stimulating sector demand and supply through niche tourism development.	2021/22
	Tourism resilience model for sustainable sector demand and supply.	2021/22
	Impact of COVID-19 on tourism sector demand and supply.	2020/21
Tourism and Transport Interface	Impact of COVID19 on tourism-transport interface.	2020/21

3. OTHER COMPLETED STUDIES: 2012/13 – 2019/20

The table below highlights the research studies that were conducted and completed between 2012/13 to 2019/20.

FOCUS AREA	RESEARCH TOPIC	YEAR COMPLETED
Customer Satisfaction	Customer service satisfaction index for the accommodation sub-sector in South Africa	2015/16
	Customer service satisfaction levels at tourist attractions in South Africa (Phase II).	2014/15
	Customer service satisfaction levels at tourist attractions in South Africa (Phase I).	2013/14
	Customer service satisfaction levels of domestic tourists at accommodation establishments in South Africa	2012/13
Domestic Tourism	Regional competitiveness an emerging domestic market segment perspective	2015/16
	An analysis of the supply of tourism products for the five key domestic market segments.	2015/16
Destination Development	Demand and supply market analysis for destination development	2017/18
	The potential of the creative industry for destination development in South Africa-film tourism as a case study.	2016/17
	Destination development through understanding tourists' expectations and memorable tourist experiences at major tourist attractions.	2016/17
	The planning, development and management of tourism resources facilities and activities in municipalities in three provinces	2013/14
	A model measure South Africa's tourism competitiveness (Phase II).	2014/15
	A model measure of South Africa's tourism competitiveness (Phase I).	2013/14

FOCUS AREA	RESEARCH TOPIC	YEAR COMPLETED
Transformation	An analysis of the public sector expenditure in the tourism value chain: identifying socio-economic opportunities for black-owned enterprises in South Africa.	2019/20
	An analysis of socio-economic opportunities in the tourism value chain	2018/19
	Understanding the employment profiles within the tourism hospitality sub-sector	2017/18
	Tourism value chain and opportunities for transformation in South Africa	2015/16
Niche Tourism Development	Sustainability of rural tourism products in South Africa: a case study of selected tourism products.	2017/18
	The impact of community-based tourism projects on local communities in KwaZulu-Natal.	2015/16
	The socio-economic impact of religious tourism on local communities in Limpopo: a case study (Phase II).	2014/15
	The socio-economic impact of religious tourism on rural communities in Limpopo: a case study (Phase I).	2013/14
	Socio-economic Impact of rural tourism routes on adjacent communities: a case study.	2012/13
Enterprise Development	Leveraging state-owned tourism assets for black SMMEs development: a case of state-owned parks, lodges and attractions (Phase II).	2019/20
	Leveraging state-owned tourism assets for black SMMEs development: a case of state-owned parks, lodges and attractions (Phase I).	2018/19
	Interventions and incentives needed to improve the number of enterprises that embrace responsible tourism management practices.	2016/17
	Governance and regulation of subvention funds	2012/13
Tourism Events and Trends	An assessment of the impact of mega trends in the tourism sector (Phase II).	2019/20

FOCUS AREA	RESEARCH TOPIC	YEAR COMPLETED
	An assessment of the impact of mega trends in the tourism sector (Phase I).	2018/19
	Development of a framework to measure the impact of events (Phase III).	2015/16
	Development of a framework to measure the impact of events (Phase II).	2014/15
	Development of a framework to measure the impact of events (Phase I)	2013/14
Tourist Guiding	Indigenous Story Tellers: Northern Cape as a case study.	2018/19
	Cross-border themed tourism routes in the Southern Africa region – practice and potential	2018/19
	A policy review of the tourist guiding sector in South Africa.	2016/17
	Harmonised tourist guiding in Southern Africa.	2015/16
	Harmonisation of tourist guiding training standards in Southern Africa (Phase II).	2014/15
	Harmonisation of tourist guiding training regulations and standards in Southern Africa (Phase I).	2013/14
	Understanding the concept of cross-border guiding in Southern Africa.	2012/13
Coastal and Marine Tourism	Development of a framework to assess the economic impact of coastal and marine tourism in South Africa (Phase III).	2018/19
	Development of a framework to assess the economic impact of coastal and marine tourism in South Africa (Phase II).	2017/18
	The governance and coordination involved in coastal and marine tourism: challenges and opportunities.	2016/17

4. CONCLUSION

This Research Agenda 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 research priorities within the tourism sector. Thus, stakeholder consultations on the Research Agenda is an ongoing process.

