



# FREE STATE PROVINCIAL TOURISM SECTOR STRATEGY 2020-2030



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## Executive Summary

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The Free State Province comprises a variety of tourist assets, including cultural diversity, rural farmland, mountains, goldfields, battlefield sites, and widely dispersed towns. The province consists of five tourism routes that contribute to the awareness of different areas in the province, along with the packaging of tourism offerings to increase the geographical spread of tourists. Large rivers, such as the Orange River and the Vaal River, are found in the province, along with the Maloti Mountains and parts of the well-known Drakensberg range. The province has a large potential for future tourism development and linkages due to its centralised location, resources, and proximity to large markets such as Lesotho and Gauteng.

The province has a significant advantage in terms of where it is located—at the heart of the country, providing easy access from various neighbouring provinces as well as Lesotho. Developing linkages with these neighbouring destinations and collaborating on product packaging will allow for the diversification of tourism offerings and also strengthen stakeholder relationships in this regard. The province is also easily accessible through major routes and airports.






The provincial government aims to grow its tourism sector to turn the province, the ‘hidden gem’ of South Africa, into a popular repeat-visit destination for both the international and domestic markets. The development of opportunities and implementing growth initiatives will require intervention from both the public and private sectors to positively change the economic contribution of tourism in line with other top-performing provinces. The key purpose of the compilation of a Provincial Tourism Sector Strategy is to assess the current tourism sector and identify potential tourism opportunities for development initiatives that will enable tourism growth and guide the province towards a competitive sector.

The strategy development process included a robust stakeholder engagement process. These engagement sessions included face-to-face engagements with local government, five district working sessions with sector stakeholders, and a perception survey that was distributed to get input from consumers. To effectively inform the tourism strategy, attention was focused on identifying the strengths and weaknesses of the tourism sector, as well as addressing 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 tourism strategy as adopted in this document.

Key barriers to tourism development that were identified throughout the strategy development process include:

-  Lack of tourism funding
-  Lack of market data
-  Lack of safety and security
-  Business non-compliance
-  Lack of stakeholder collaboration

Key success factors for tourism development that were identified throughout the strategy development process include:

-  SMME development and support
-  Rural tourism development
-  Strategic marketing and awareness creation
-  Grading of accommodation establishments and conference facilities
-  Upgrading/revitalisation of existing tourism products and amenities

A common theme that was identified with the survey results is the lack of marketing and awareness of the offerings in the Free State. Tourists indicated dissatisfaction with the provision of, and access to quality tourism information (especially on online platforms such as product websites and social media). To attract more people to the province, the frequency, quality, and impact of information-sharing and marketing efforts must be prioritised.

Niche tourism opportunities have been identified in the fields of adventure, cuisine, agriculture, sport, and dark tourism. Effective and creative product packaging will diversify the province's tourism offerings and support cross-provincial tourism development. The tourism policy environment needs to be revised (formulation of a provincial tourism policy/bill) and the institutional architecture needs to encourage effective collaboration and communication between the government, the private sector, and communities.

Effective collaboration between all stakeholders is critical to developing an enabling environment for tourism to flourish. Collaboration also makes it possible to diversify product offerings and form joint-marketing and product packaging ventures which ensures a benefit flow to all parties involved. The province should also investigate potential collaboration opportunities with neighbouring provinces and Lesotho to develop unique tourism offerings and co-package themed offerings (i.e. adventure activities, heritage and cultural products, sporting events, etc.)

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## Abbreviations/Acronyms

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<b>CATHSSETA</b>	Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority
<b>COGTA</b>	Cooperative Governance & Traditional Affairs
<b>DESTEA</b>	Department of Economic, Small Business Development, Tourism and Environmental Affairs
<b>DM</b>	District Municipality
<b>DSACR</b>	Department of Sport, Arts, Culture and Recreation
<b>dti</b>	Department of Trade and Industry
<b>FDC</b>	Free State Development Corporation
<b>FS</b>	Free State
<b>FSGLTA</b>	Free State Gambling, Liquor and Tourism Authority
<b>FTT</b>	Fair Trade Tourism
<b>GDP</b>	Gross Domestic Product
<b>GGHNP</b>	Golden Gate Highlands National Park
<b>GTA</b>	Gauteng Tourism Authority
<b>GTIP</b>	Green Tourism Incentive Programme
<b>IC</b>	Interpretation Centre
<b>ICT</b>	Information Communication Technology
<b>IED</b>	Integrated Economic Development
<b>IDP</b>	Integrated Development Plan
<b>IWMP</b>	Integrated Waste Management Plan
<b>KDF</b>	Karoo Development Foundation
<b>LED</b>	Local Economic Development Strategy
<b>LM</b>	Local Municipality
<b>LOS</b>	Length of Stay
<b>MEC</b>	Member of the Executive Council
<b>MICE</b>	Meeting, Incentives, Conferences and Exhibitions
<b>MINMEC</b>	Ministers and Members of Executive Council
<b>MM</b>	Metro Municipality
<b>NCTA</b>	Northern Cape Tourism Authority
<b>NDT</b>	National Department of Tourism
<b>NEF</b>	National Empowerment Fund
<b>NTSS</b>	National Tourism Sector Strategy
<b>NYDA</b>	National Youth Development Agency
<b>PPP</b>	Public-Private Partnership
<b>PTSS</b>	Provincial Tourism Sector Strategy
<b>POV</b>	Purpose of Visit
<b>SA</b>	South Africa
<b>SAT</b>	South African Tourism
<b>SATSA</b>	South African Tourism Services
<b>SBD</b>	Small Business Development

<b>SDF</b>	Spatial Development Framework
<b>SEDA</b>	Small Enterprise Development Agency
<b>SEFA</b>	Small Enterprise Finance Development Agency
<b>SMME</b>	Small, Medium and Micro Enterprise
<b>SRIP</b>	Social Responsibility Implementation Programme
<b>TBCSA</b>	Tourism Business Council of South Africa
<b>TEDSP</b>	Tourism Enterprise Development and Support Programme
<b>TGCSA</b>	Tourism Grading Council of South Africa
<b>TSP</b>	Tourism Support Programme
<b>TTF</b>	Tourism Transformation Fund
<b>UNESCO</b>	United Nations Educational, Scientific and Cultural Organisation
<b>VFR</b>	Visiting Friends and Relatives
<b>VIC</b>	Visitor Information Centre
<b>WTTC</b>	World Travel and Tourism Council

## SECTION 1: INTRODUCTION

### 1.1 Background

As one of the world's largest economic sectors, travel and tourism creates jobs, drives exports, and generates prosperity across the world. The sector, comprised of a wide range of industries, aims to serve and support domestic, international, business and leisure visitors. Companies, large and small, in industries ranging from accommodation and transportation to food and beverage, retail and culture and sports and recreation, all strive to create products and services that bring people together, support communities and celebrate the wonders that our world can offer<sup>1</sup>.

The Free State provincial government aims to grow its tourism sector to turn the province, the 'hidden gem' of South Africa, into a popular repeat-visit destination for both the international and domestic markets. Developing opportunities and implementing growth initiatives will require intervention from both the public and private sectors to positively change the economic contribution of tourism in line with other top-performing provinces. The key purpose of the compilation of a provincial tourism sector strategy is to assess the current tourism sector and identify potential tourism opportunities for development initiatives that will enable tourism growth and guide the province towards a competitive sector.

Therefore, initiatives to increase tourist arrivals, length of stay and expenditure that will contribute to the transformation of the provincial tourism sector—while creating opportunities for entrepreneurs to participate and establish profitable businesses expanding the current tourism sector—must be identified. To effectively grow the provincial tourism sector, opportunities, planning, development, facilitation, marketing and support structures must be implemented.

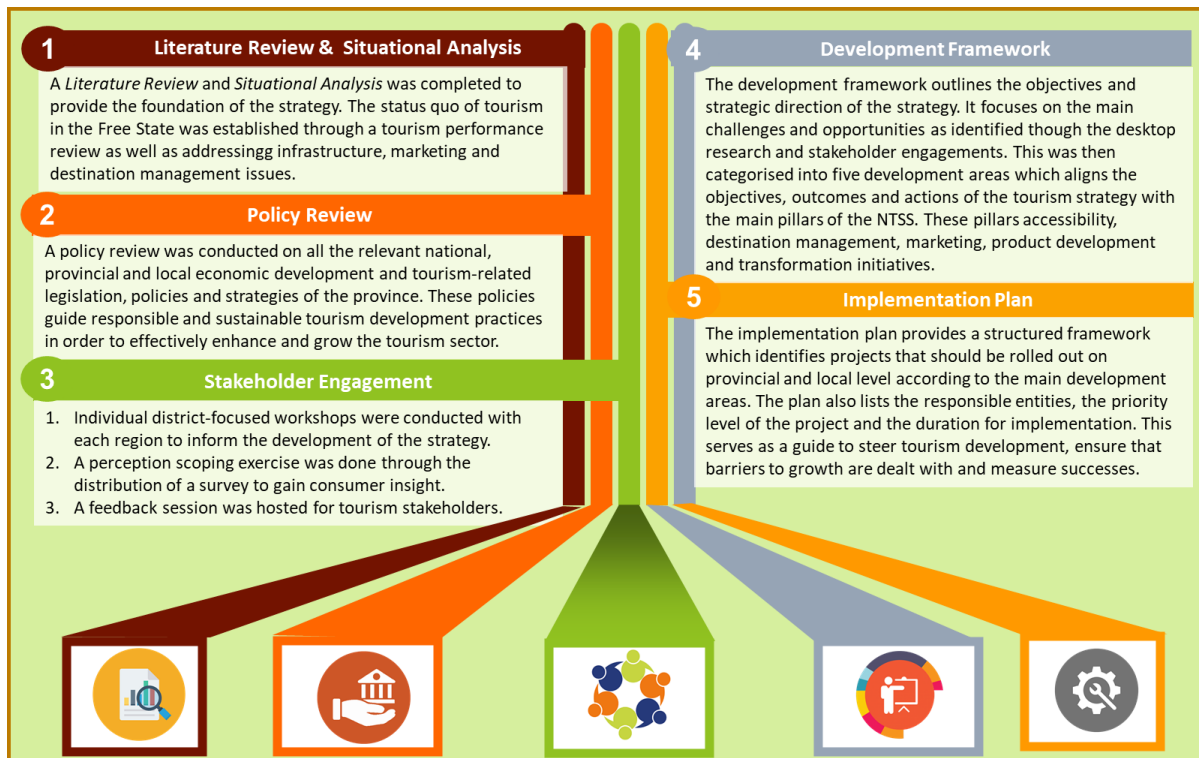
### 1.2 Methodology

In formulating the tourism strategy per stakeholder engagements, five online workshops were conducted with stakeholders directly associated with the tourism sector in the Free State. Stakeholder engagements involved representatives from the public as well as the private sector (provincial and local government, tourism product owners and academia). Engagements were directed at assessing the current state of tourism in the province and reviewing policies and institutional structures that inform tourism development and management.

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<sup>1</sup>Travel & Tourism Economic Impact Report 2019. Available Online at: <https://www.wttc.org/>

Figure 1: Methodology



To guide the tourism strategy, attention was focused on identifying the strengths and weaknesses of the tourism sector, as well as addressing 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 tourism strategy as adopted in this report.

### 1.3 Report Structure

The report is structured according to the following sections.

<b>Section 1</b>	This section provides background information about the significance of tourism as well as the purpose of developing the Free State Provincial Tourism Sector Strategy. It also outlines the methodology that was followed in the development process and the stakeholder engagements.
<b>Section 2</b>	Section 2 provides a status quo on the performance of tourism in the Free State and also addresses spatial elements in terms of the individual districts and tourism routes.
<b>Section 3</b>	This section provides an overview of the main international and domestic markets for the province. It highlights the current main selling points and identifies niche development potential to enhance the competitiveness of the Free State. The section concludes with a SWOT analysis of the tourism sector.

<b>Section 4</b>	The strategic framework section builds upon the vision and objectives of the strategy. The strategic direction approach is addressed alongside key success factors as identified through the desktop review and the stakeholder engagements.
<b>Section 5</b>	This section relays each of the development pillars on which the success of the tourism sector rests. Each pillar is unpacked to reveal the main objectives, key considerations and potential interventions to address the relevant issues within each area.
<b>Section 6</b>	The institutional arrangement structure shows the interaction and channels that should be in place for tourism to optimally function, not only on a provincial level but on a district and local level as well. Institutional barriers are also addressed, and recommendations are provided to improve communication between stakeholders in all spheres of government and the private sector.
<b>Section 7</b>	The implementation plan identifies projects to be implemented on provincial and regional levels. The key role-players, timeframe and priority level of each project are also outlined.
<b>Section 9</b>	The strategy is concluded with key recommendations to be considered for tourism development and management to ultimately create an enabling environment in which the tourism sector can flourish.

## SECTION 2: CONTEXTUAL OVERVIEW

### 2.1 Spatial Overview of Free State Province

The Free State Province is situated in the geographical centre of South Africa, with Bloemfontein as its capital city. Other important towns recognised in the province include Welkom, Kroonstad, Sasolburg, Bethlehem and Clarens. The province is the third-largest in the country, covering an area of approximately 129 825km<sup>2</sup>. It shares borders with the Northern Cape, Eastern Cape, North West, Mpumalanga, KwaZulu-Natal and Gauteng provinces. The international border of Lesotho forms most of the eastern border of the Free State.<sup>2</sup>

The province, with its hills, wide golden plains, sandstone mountains and temperate climate, holds the main route between Johannesburg and Cape Town, known as the N1 national road. Other national roads crossing through the province are the N3, N5, N6 and N8. These routes link the province with its neighbouring provinces and towns.

The N8 connects with the Northern Cape and Lesotho, the N6 with Eastern Cape, the N1 with Cape Town and Gauteng, the N5 with KwaZulu-Natal, and the N3 with Gauteng and KwaZulu-Natal. Other routes, including these, eventually connect with other national routes surrounding the Free State Province. The map below indicates the Free State province's geographical layout in terms of towns, cities and roads.

The main economic activities of the Free State Province are agriculture (3.6%), mining (7.8%) and manufacturing (7.6%)<sup>3</sup>. The province accommodated a population of 3 025 352 in 2020 with approximately 887 983 (2020) households spread throughout the area, as well as a constant population growth, which is beneficial to the local economy. The monthly average household income recorded in the province in 2020 was approximately R7 856. Higher incomes generated by households

Map 1: Free State Province



<sup>2</sup> Municipalities of South Africa, 2020.

<sup>3</sup> Quantec, 2020.

in the province indicate that more disposable income is available to spend on activities that will enhance domestic tourism and the support given to local tourism businesses during off-peak seasons.

The Free State Province comprises myriad tourist assets, including cultural diversity, rural farmland, mountains, goldfields, battlefield sites and widely dispersed towns. The province consists of five tourism routes that contribute to the awareness of different areas in the province, along with the packaging of tourism offerings to increase the geographical spread of tourists. Large rivers, such as the Orange River and the Vaal River, are found in the province, along with the Maloti Mountains and parts of the well-known Drakensberg range. The province has a large potential for future tourism development and linkages due to its centralised location, resources and proximity to large markets such as Lesotho and Gauteng.

## 2.2 District Profiles

The province comprises the four district municipalities (DMs) of Lejweleputswa, Thabo Mofutsanyana, Xhariep and Fezile Dabi and one metropolitan municipality (MM), Mangaung Metropolitan Municipality, where its capital city is located. The districts, their local municipalities (LMs), and the metro and its associated towns are listed below.

				
<b>Lejweleputswa</b>	<b>Thabo Mofutsanyana</b>	<b>Fezile Dabi</b>	<b>Xhariep DM</b>	<b>Mangaung</b>
<ul style="list-style-type: none"> <li>- Tokologo LM</li> <li>- Tswelopele LM</li> <li>- Matjhabeng LM</li> <li>- Nala LM</li> </ul>	<ul style="list-style-type: none"> <li>- Setsoto LM</li> <li>- Dihlabeng LM</li> <li>- Nketoana LM</li> <li>- Maluti-A-Phofung LM</li> <li>- Phumelela LM</li> <li>- Mantsopa LM</li> </ul>	<ul style="list-style-type: none"> <li>- Moqhaka LM</li> <li>- Ngwathe LM</li> <li>- Metsimaholo LM</li> <li>- Mafube LM</li> </ul>	<ul style="list-style-type: none"> <li>- Kopanong LM</li> <li>- Letsemeng LM</li> <li>- Mohokare LM</li> </ul>	<ul style="list-style-type: none"> <li>- Soutpan</li> <li>- Dewetsdorp</li> <li>- Van Stadensrus</li> <li>- Wepener</li> <li>- Bloemfontein</li> <li>- Botshabelo</li> <li>- Thaba Nchu</li> </ul>

Figure 2: Thabo Mofutsanyana District Profile

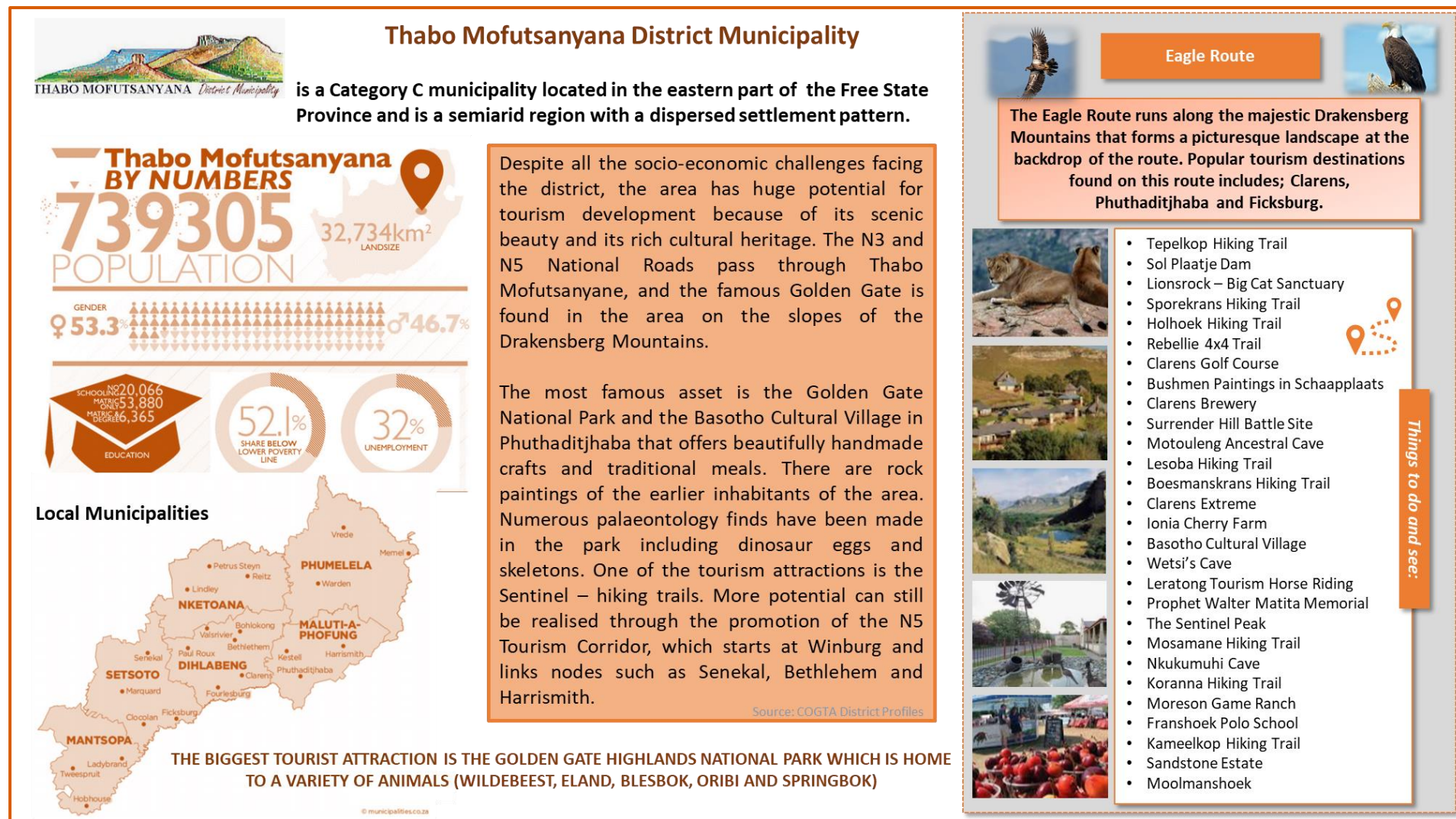




Figure 3: Fezile Dabi District Profile

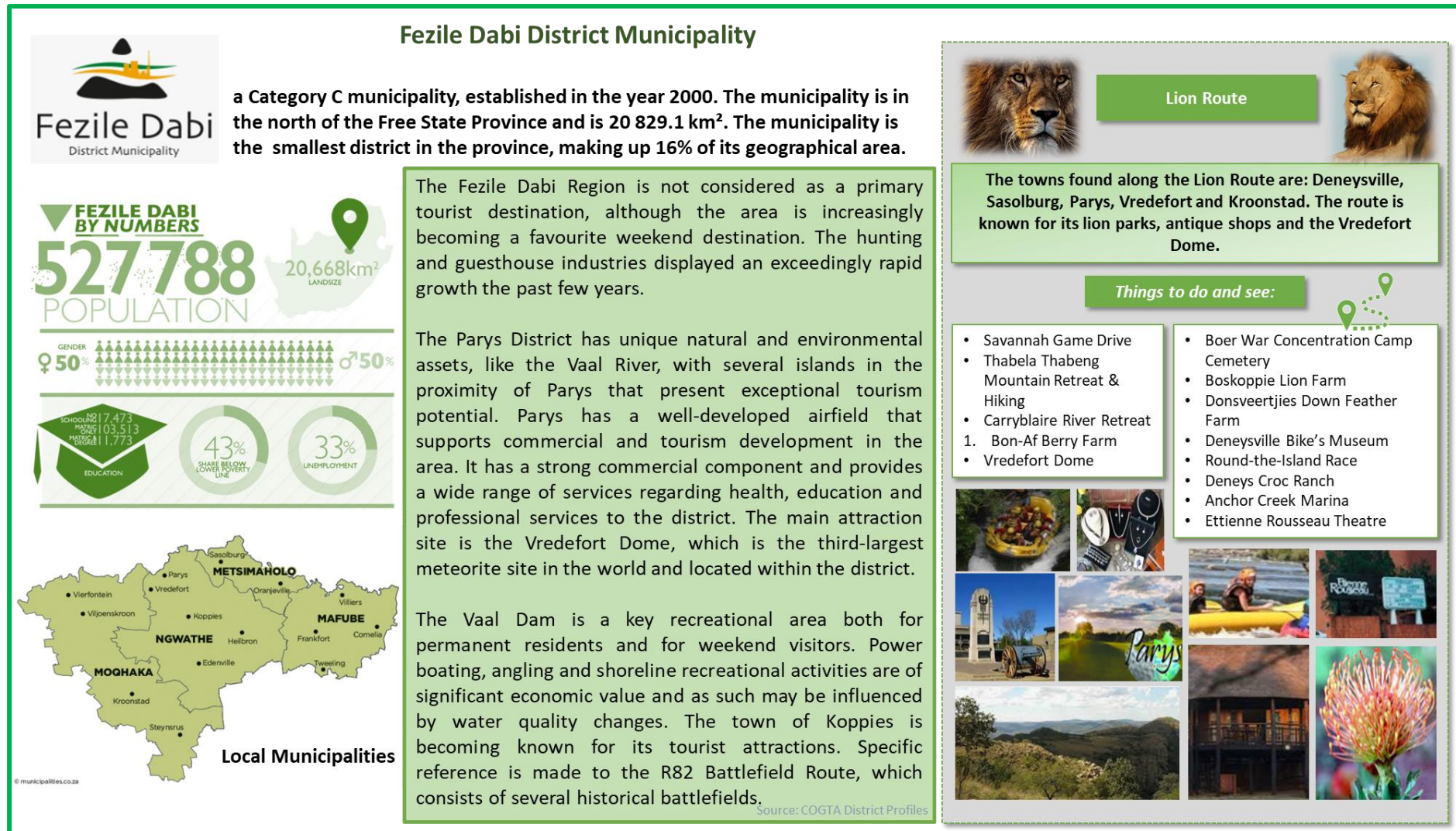


Figure 4: Xhariep District Profile

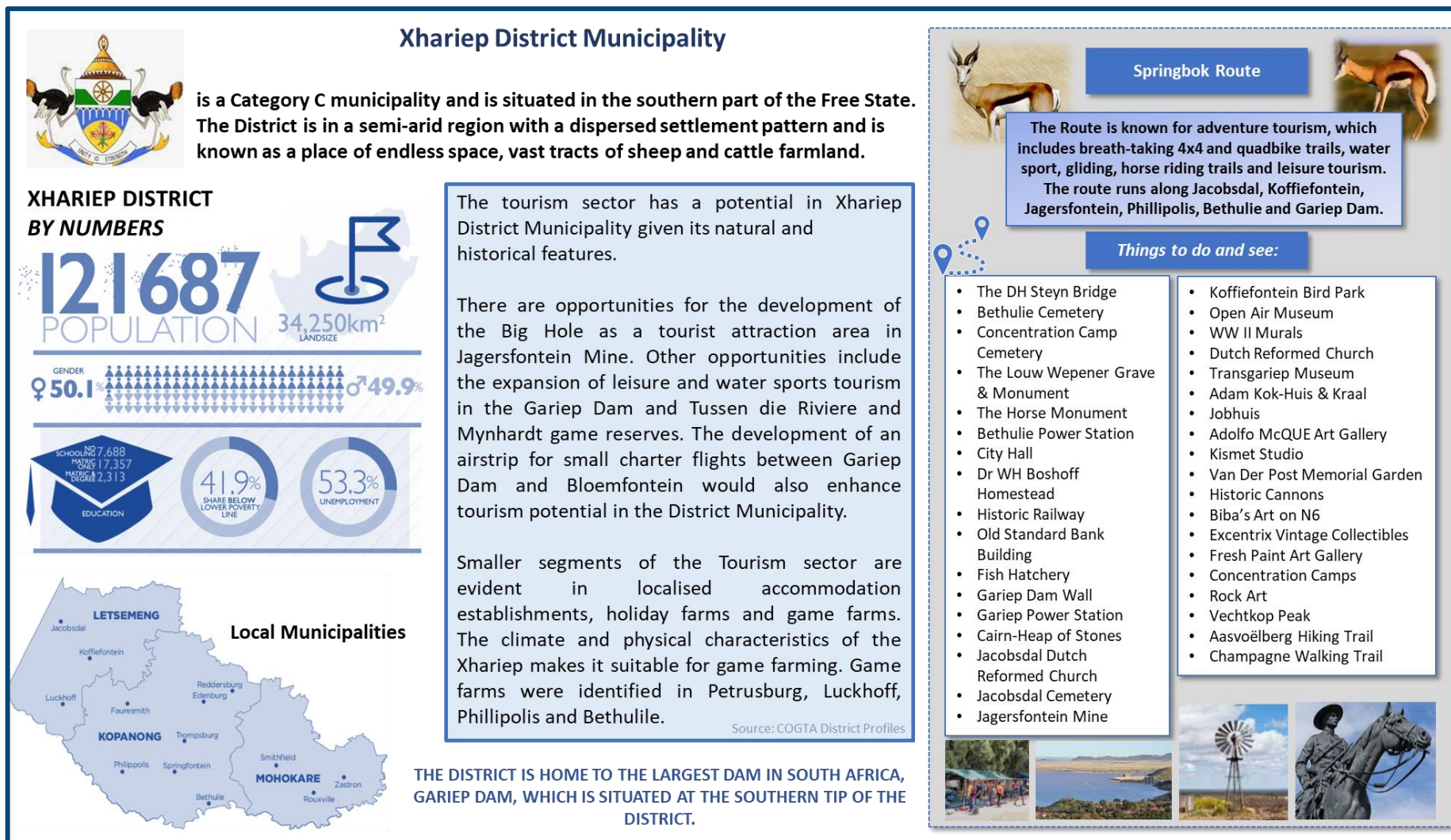
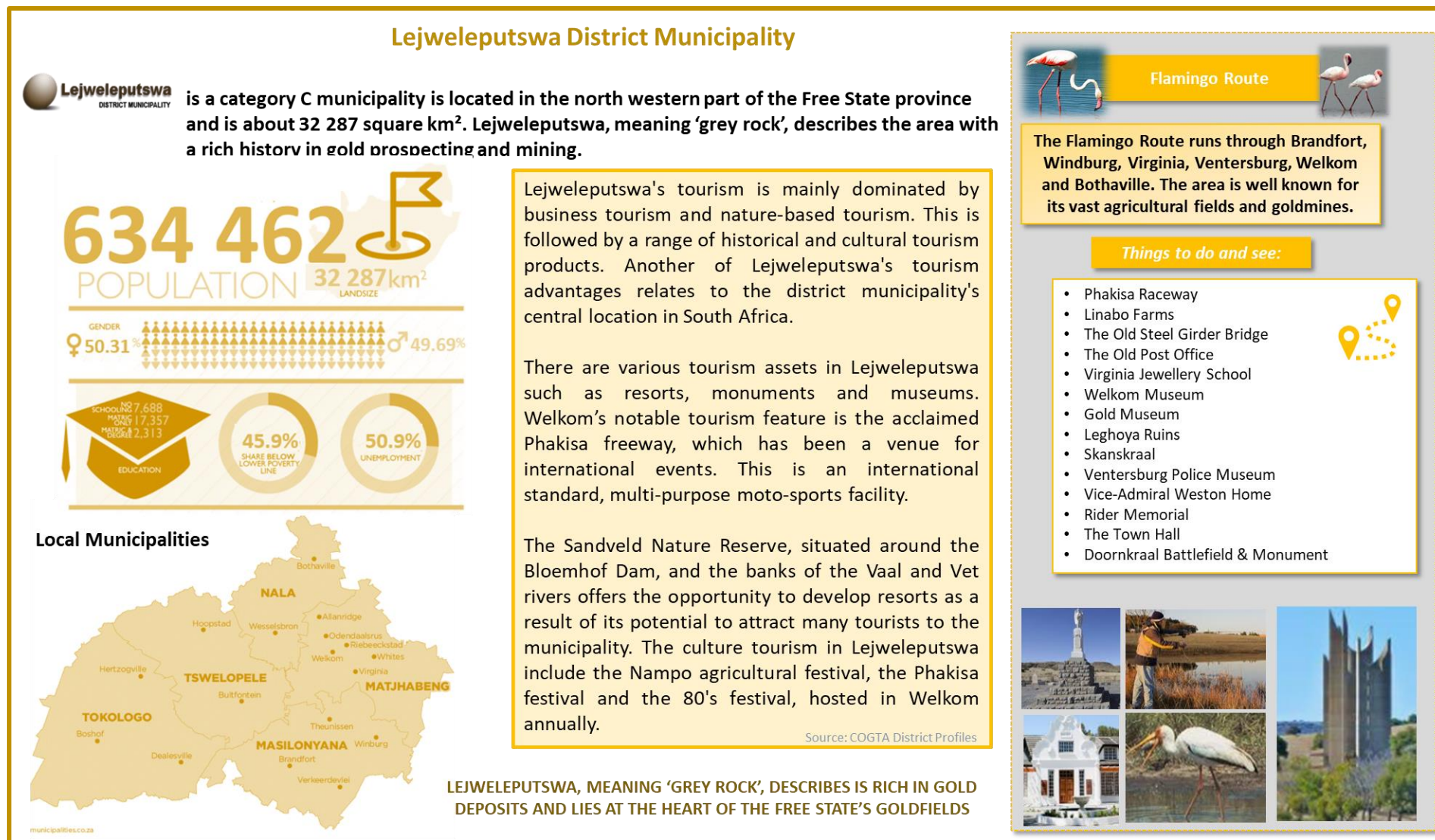
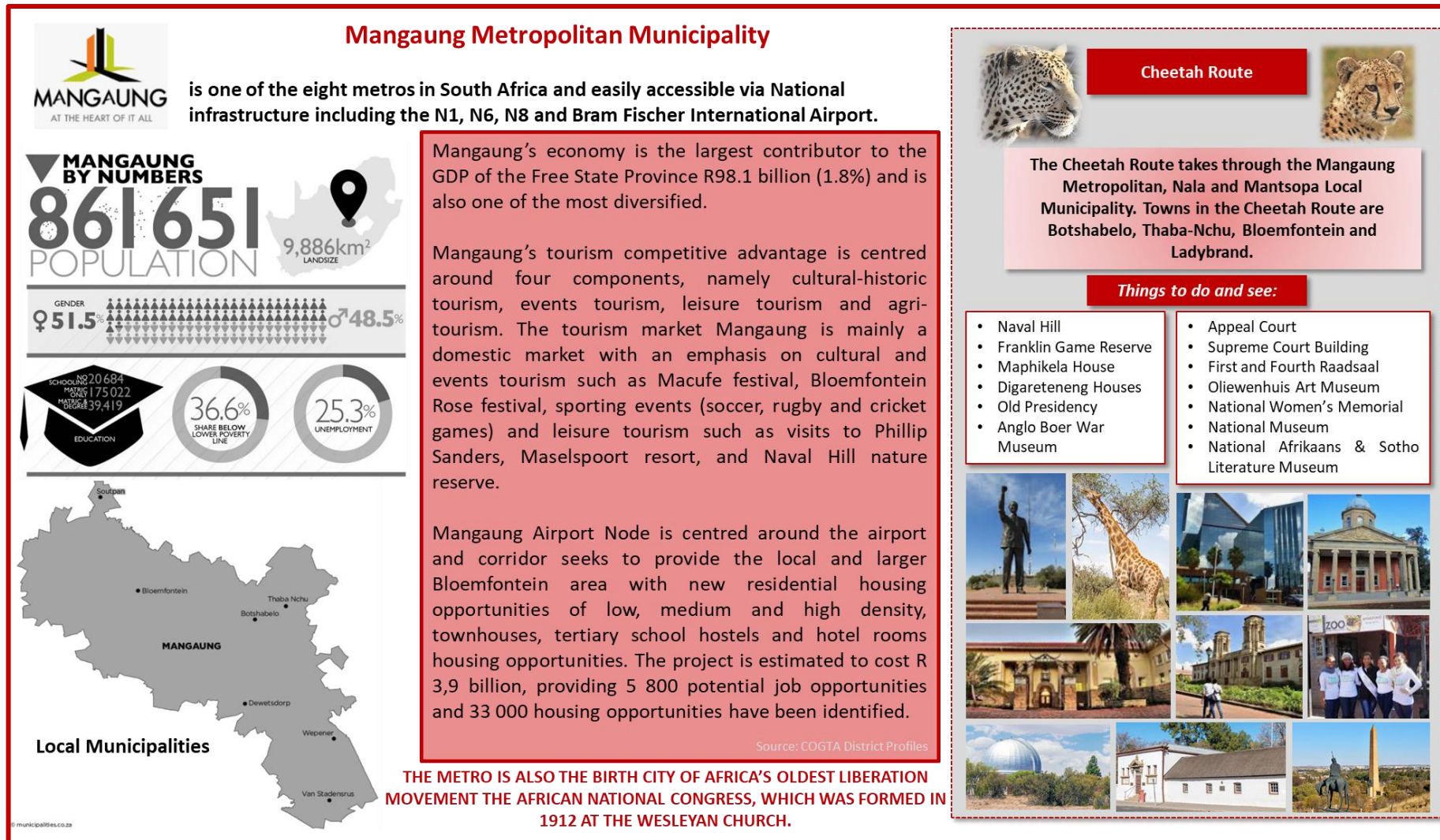


Figure 5: Lejweleputswa District Profile



LEJWELEPUTSWA, MEANING 'GREY ROCK', DESCRIBES IS RICH IN GOLD DEPOSITS AND LIES AT THE HEART OF THE FREE STATE'S GOLDFIELDS

Figure 6: Mangaung Metropolitan Municipality Profile



## 2.3 Policy Review

### 2.3.1 Policy Alignment

To develop a tangible and implementable Provincial Tourism Sector Strategy, all initiatives and objectives must be aligned with existing national, provincial, district and local policies. In pursuit of efficient alignment, this sub-section provides an overview of all relevant policies and legislation within the province that have direct impacts on the future growth and development of the tourism sector.

Provincial policies and legislation influence all district municipalities (including their local municipalities). It is therefore essential that all developed documentation, such as this strategy, harmonise with the above to guarantee aligned objectives, initiatives and developmental growth within the provincial tourism sector strategy. Alignment of these regulatory documents will increase the throughput and success of new development initiatives and secure the support of all key sector role-players for future sustainable development.

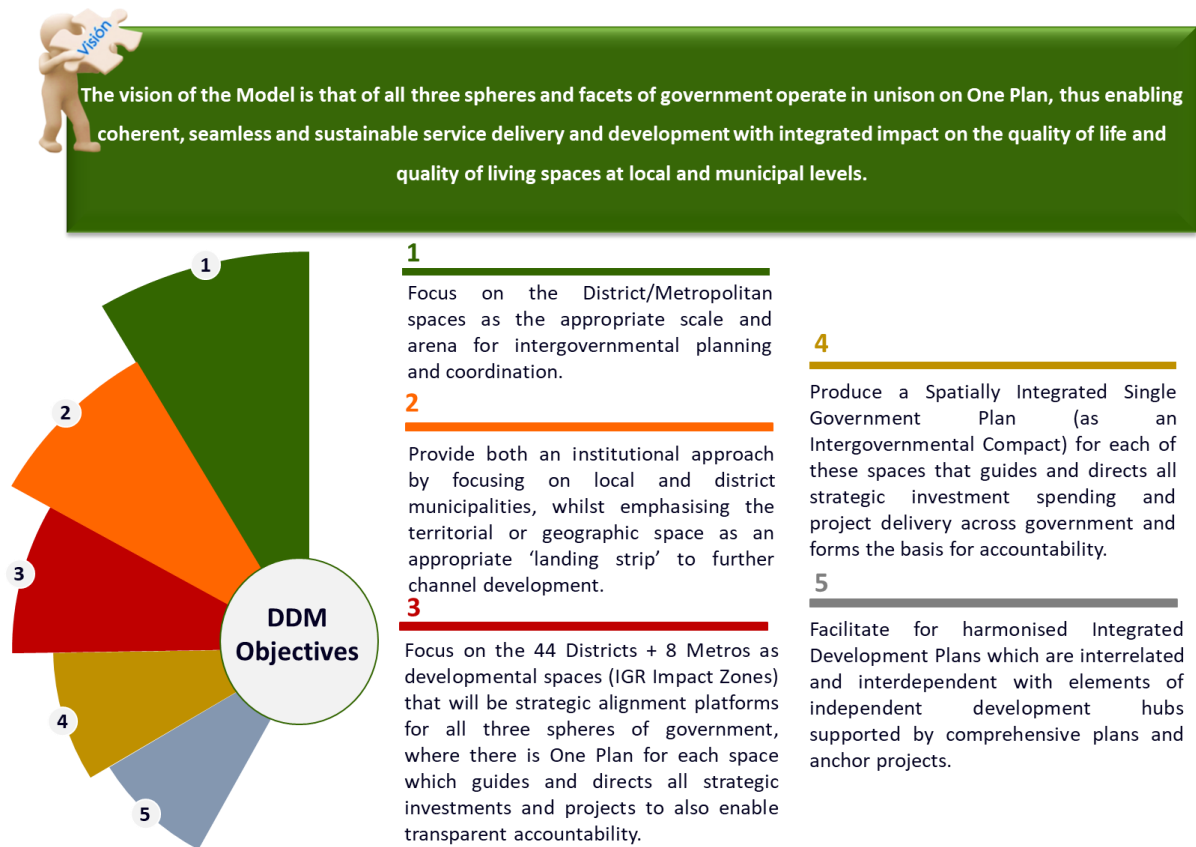
Figure 7: Policy Alignment



### 2.3.2 District Development Plan

The model is a practical Intergovernmental Relations (IGR) mechanism for all three spheres of government to work jointly and to plan and act in unison. The model consists of a process by which joint and collaborative planning is undertaken in local, district and metropolitan spheres together by each sphere of government resulting in a single, strategically focused ‘one plan’.

Figure 8: DDM Vision and Objectives



In giving effect to the vision of One Plan positively impacting lives at a local level, the district development model is premised on institutionalising a programmatic approach to IGR, which enables:

- Improving integrated planning across government through the formulation and implementation of One Plan or Joined-Up Plans for each of the 44 District and eight Metropolitan geographic spaces or (52 IGR Impact Zones).
- Streamlined and effective Local Government and/or authority's capacity building by consolidating and strategically coordinating capacity building initiatives and programmes at a district level.
- Municipalities and authorities to perform their mandated functions and duties effectively and efficiently by mobilising and making available expertise, key skilled personnel and systems that can be shared between district as well as local municipalities and authorities as needed.
- Monitoring of the effectiveness of government and the spatial and developmental impact on communities in the 52 IGR Impact Zones.

The One Plan will be strategic and long-term, expressing the commonly agreed diagnostics, strategies and actions which will be broken down into annual operation plans and five- to ten-year implementation plans to enhance service delivery and development in each of the 44 districts and

eight metropolitan spaces. Each sphere and sector department will have to elaborate on their plans and actions within the scope of their mandated powers and functions to give effect to the One Plan as well as the execution of their functions. Budgets, including conditional grants and equitable share, need to be allocated to the extent that spheres and departments execute the Long-Term Plan commitments.

Figure 9: Programmatic Approach



Elements of the One Plan include demographics and district profiling; economic positioning; spatial restructuring; infrastructure engineering; and governance and management, all of which are supported by a monitoring, evaluation and reporting system as well as an effective communications strategy.

### 2.3.3 Policy Implications for the Province

This sub-section provides a summary of the implications these policies and legislation have on the development and implementation of the Free State PTSS. These policies and legislation strive to enable and stimulate growth and development throughout all sectors and industries in South Africa;

it is, therefore, important to measure the implications they have on the successful development of the strategy. The following themes are prominent in tourism legislation.

Table 1: Policy Implications for Tourism

<p><b>Skills Development</b></p> 	<p>Skills development in any industry and sector is essential for the sustainable operations of business-related activities and productivity. Continuous skills development throughout all spheres of societies must be encouraged through regulatory documentation. The intangible nature of the tourism sector requires a competent workforce that can deliver quality services to tourists.</p>
<p><b>Service Delivery</b></p> 	<p>Service delivery is a concern raised throughout different districts and local municipal spheres, highlighting a critical need for effective service delivery by all government institutions and the tourism value chain. As the tourism sector is based on providing tourists with intangible experiences, it is important to create tangible experiences through memorable visits that will encourage repeat visits to the province. 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.</p>
<p><b>Job Creation</b></p> 	<p>Job creation will alleviate poverty and improve skills development in the workforce. The South African tourism sector contributes significantly to employment, which aligns with the vision of the NDP to create 1.1 million jobs by 2030. The national tourism sector envisions to grow tourism sector employment to 2.1 million jobs by 2028.</p>
<p><b>Economic Development and Growth</b></p> 	<p>The ultimate purpose of policy and legislation development in South Africa is to prioritise economic development and growth. Economic growth and development not only strengthen the economy of an area but also enable job creation and stimulate successful business environments. Thus, the main aim is to create an environment that enables sustainable economic development and growth through the implementation of policies and legislation. The NDP classifies the tourism sector as one of the main drivers of employment creation and economic growth as it envisages the promotion of South Africa as a major tourism and business events destination.</p>
<p><b>Business Retention and Expansion</b></p> 	<p>Various tourism-related businesses are based on Small, Medium and Micro Enterprise (SMME) activities; as indicated by key industry role-players, SMMEs in the tourism sector are key in growing South Africa’s destination offering. Business retention and expansion are closely linked to SMME development, and the majority of municipalities identify business skills development, business start-up and management as important for expanding the tourism sector and decreasing the unemployment rate in the province and nationally.</p>
<p><b>Sustainable Development</b></p>	<p>Policies and legislation prioritise development initiatives in sustainability that include job creation, BEE inclusion, transformation, and management of the sector. It further emphasises successful destination management and</p>





development relating to good practices, activities and relationships that assist in the organisation of the tourism sector system to enable sustainable growth.

Throughout the policy and legislation overview, it is highlighted that tourism comprises sustainable growth potential and is regarded as an important sector in the South African economy. It is therefore essential to align the PTSS with these documents and consider and incorporate the principles, priorities, challenges, objectives and opportunities identified to enable sustainable tourism sector development that will contribute to the economic growth of the province. These developments will only be successful through **strong collaborative relationships** formed between tourism destinations, government institutions, key sector role-players and all relevant stakeholders.

## 2.4 Provincial Tourism Performance

This section addresses the Free State Province's tourism sector and its performance on an international and domestic level, based on the most recent available data. It is important to heed these performance indicators when considering any tourism development, management and growth interventions to ensure alignment with travel patterns, trends and preferences. The aim is to get tourists to stay in a region for longer, which translates into more money spent in the destination. While the Free State province is mainly known for its agricultural activities, its tourism sector flourishes due to the attractive natural landscapes, rural tranquillity and diverse cultures present in the province. Tourism is regarded as one of the province's fastest-growing economic sectors, with leisure and business tourism enjoying the best growth within the industry.<sup>4</sup>

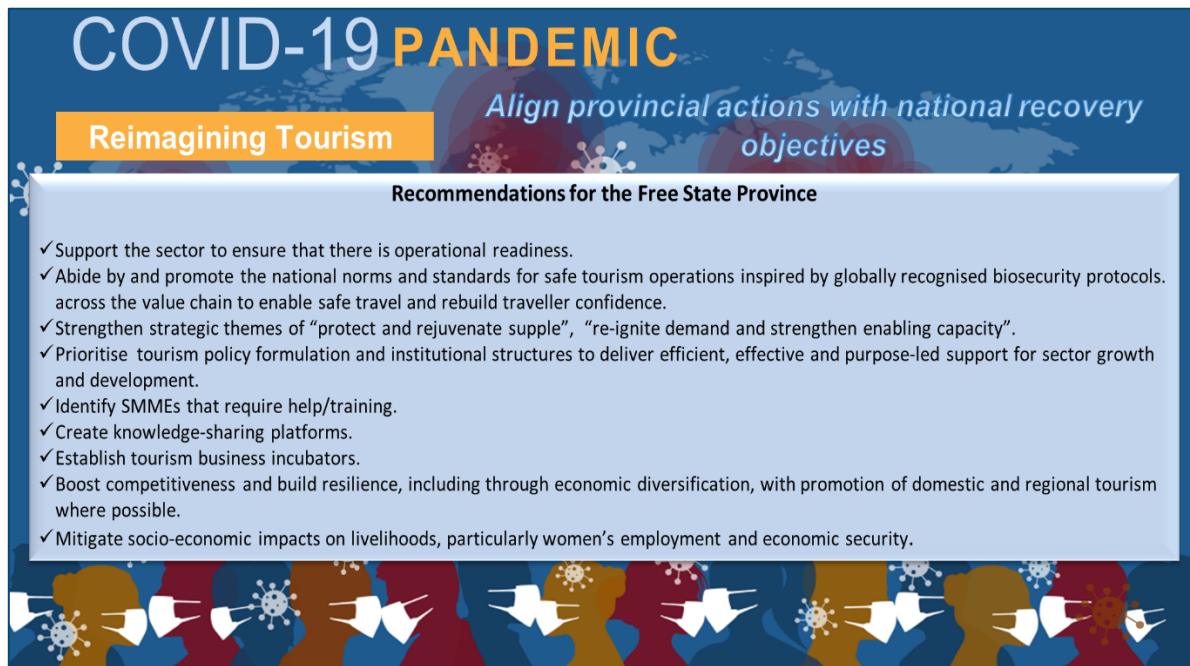
Amidst the COVID-19 pandemic, it is imperative for the province to keep up with tourism trends, not only to stay relevant but also to attract a larger tourism market, providing to the niche markets in particular. Also, tourism can positively contribute to transformation through effective small, micro and medium enterprises (SMMEs) and skills development to assist in reducing poverty and improving the livelihoods of the local communities. The key to further develop the Free State as a successful tourism destination is to create a conducive post-COVID-19 environment in which the economy and private sector can flourish. Tourism infrastructure development plays a vital role in establishing such an environment as the visitor experience depends on the delivery of basic services, emergency services, and tourist safety and security. The tourism sector is known for its resilience against major crises as proven in the past. The focus should now be on recovering the sector, restoring travel confidence and securing destination readiness.

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<sup>4</sup> Global Africa Network, 2019.

The Free State must focus all energy and actions towards tourism recovery initiatives and support programmes. The National Tourism Recovery Plan maintains that tourism recovery depends on responsible recommencement, coupled with a compelling and carefully executed strategy for re-entry. The recovery plan necessitates a balanced set of interventions that consider both supply and demand-side support in line with a gradual easing of internal restrictions<sup>5</sup>.

Figure 10: Tourism Recovery Recommendations



The Free State Department of Economic, Small Business Development, Tourism and Environmental Affairs has paid more than R30 million to small businesses to help them recover from the COVID-19 pandemic and to save jobs. These businesses are beneficiaries of the economic recovery incentives put together by the department. A total of 714 enterprises have been approved for the incentives. Approvals were as follows<sup>6</sup>:

- Risk-Sharing Incentive Scheme – 15
- Enterprise Incentive Scheme – 54
- Spaza Shops and General Dealers Incentives – 395
- Informal Business Support – (Hawkers) – 250

<sup>5</sup> National Tourism Recovery Plan 2020. Available at:

<https://www.tourism.gov.za/AboutNDT/Documents/Tourism%20Recovery%20Plan.pdf>

<sup>6</sup> DESTEA. 2020. Small business benefits from COVID-19 economic recovery incentives

### 2.4.1 International Tourism Demand

The figure below shows the province’s international tourism performance through arrivals, length of stay, number of bednights, expenditure and the main purpose of visits.

Figure 11: Free State International Tourism Performance

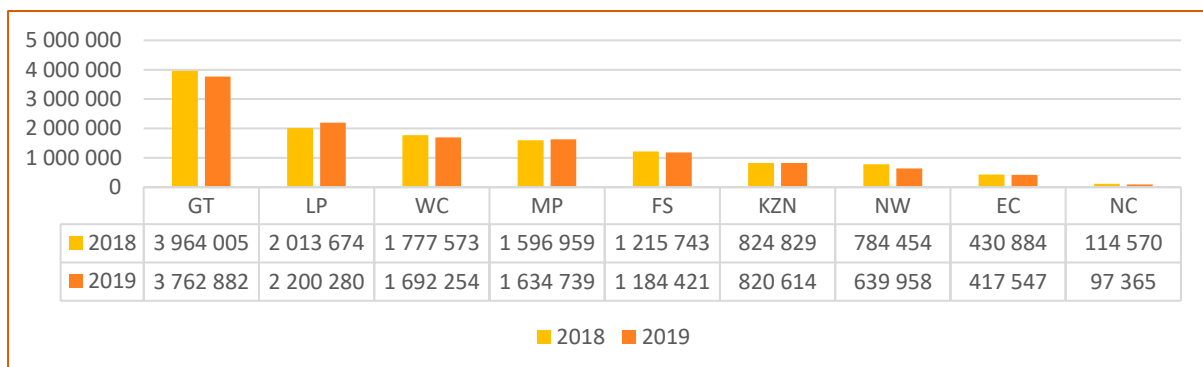


Source: SAT Annual Tourism Report 2019

#### Arrivals

The international arrivals to the Free State accounted for 1.1 million foreign visitors in 2019 in total. The province suffered a 2.1% decrease from the previous year. All provinces recorded decreases in the number of international tourist arrivals except for Limpopo and Mpumalanga.

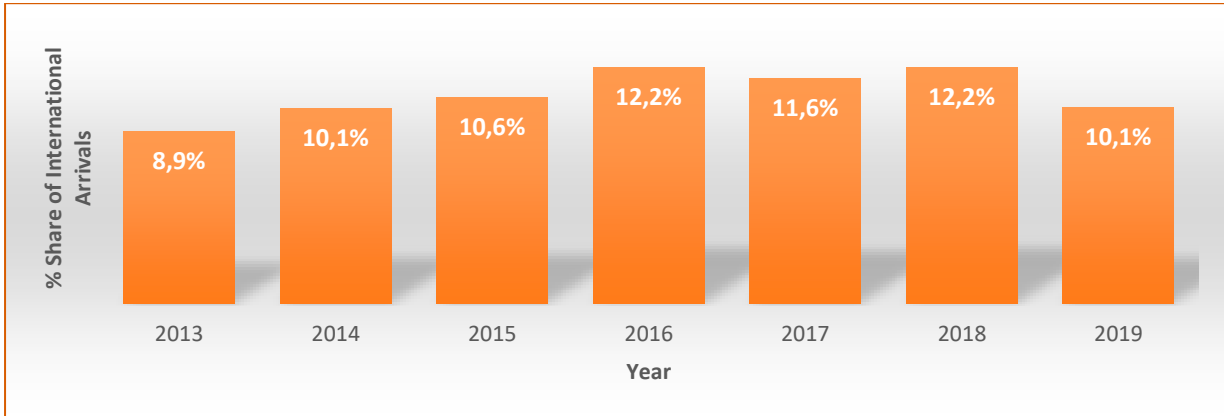
Figure 12: International Arrivals per Province



Source: SAT Annual Tourism Report 2019

Looking at the general trend for international arrivals, the province saw a steady increase from 2013 to 2018. Arrivals recorded for 2019 mirrored that of 2014.

Figure 13: Free State International Arrivals Trend 2013–2019

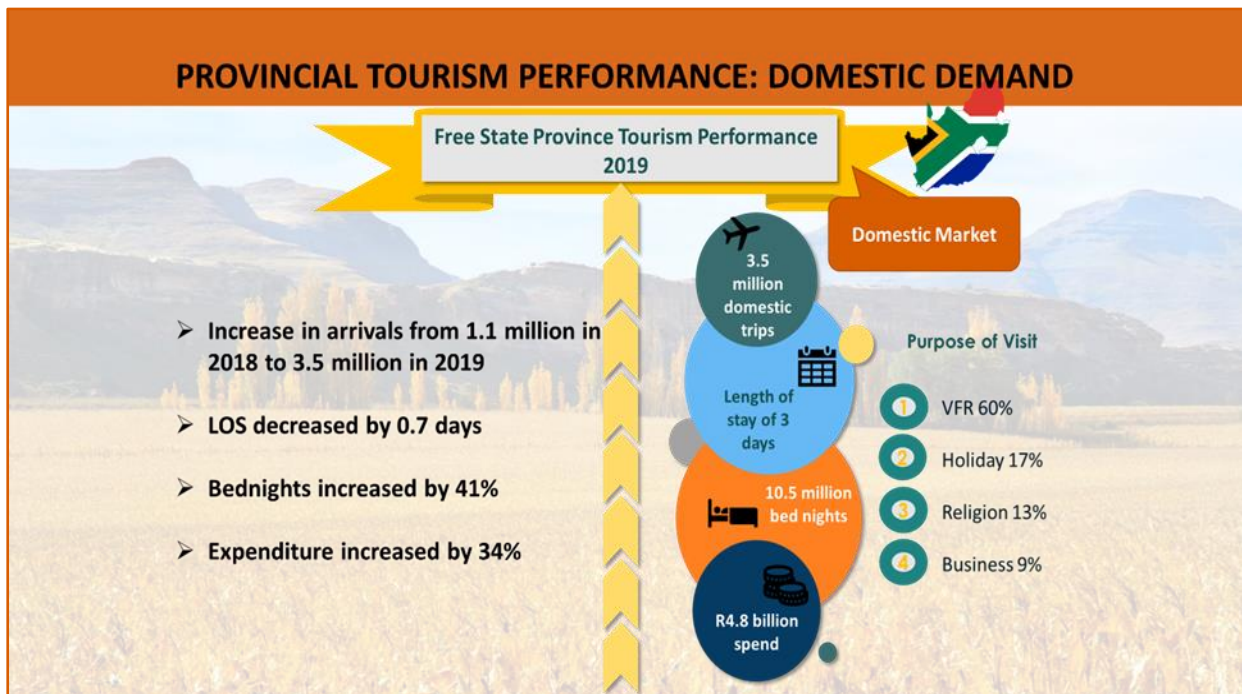


Source: SAT Annual Tourism Report 20

### 2.4.2 Domestic Tourism Performance

The figure below shows the province’s domestic tourism performance through arrivals, length of stay, number of bednights, expenditure and the main purpose of visits.

Figure 14: Free State Domestic Tourism Performance



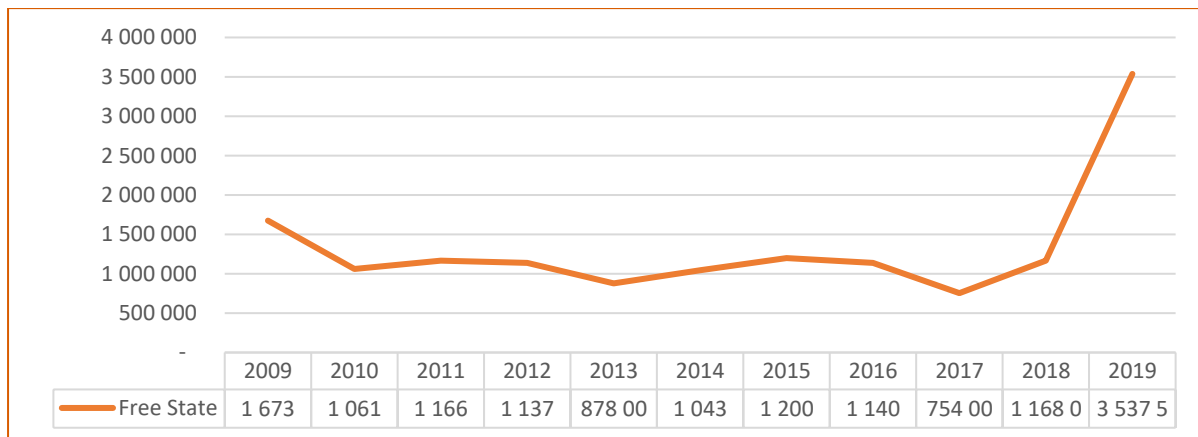
Provinces rely on domestic tourism as a tool to reduce poverty, improve infrastructure, generate employment and, most importantly, drive economic growth. The activities of domestic tourists are

economically important as the money spent on domestic tourism feeds back into South Africa’s economy, thereby establishing a more viable and prosperous economy.

Domestic tourism in the Free State flourished in 2019 with impressive increases experienced in most performance indicator categories. Arrivals, the number of bednights and expenditure saw exponential growth, confirming not only that domestic tourism is thriving, but also that these markets should be targeted with more focused and strategic marketing and product packaging.

The figure below shows the domestic arrival trend in the Free State over the last decade. The province experienced a massive increase in arrivals from 1.1 million in 2018 to 3.5 million in 2019. The increases in arrival volumes show that the province remains sturdy as a tourism destination competitor. For as long as results keep growing in a positive direction, the Free State should invest in, encourage and pioneer development in this sector.

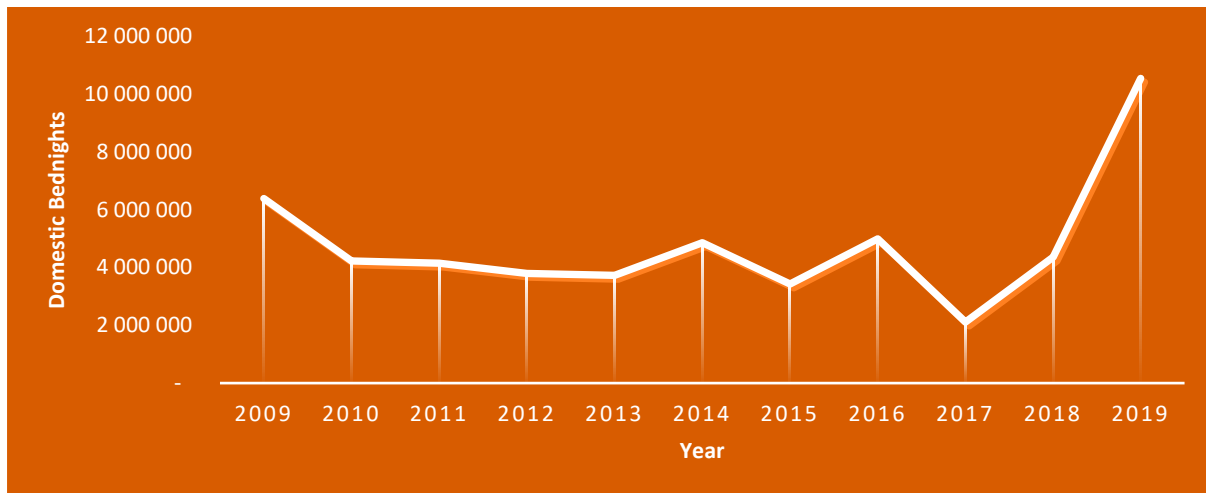
Figure 15: Domestic Trips Trend



Source: SAT Annual Tourism Report 2019

The figure below depicts the trend in domestic bednights in the province over the last decade. There has been a steady increase in bednights from 2009, with decreases experienced in 2015 and 2017. Fortunately, the province saw sharp increases in both 2018 and 2019.

Figure 16: Domestic Bednights Trend



Source: SAT Annual Tourism Report 2019




### SECTION 3: FREE STATE POSITIONING







#### 3.1 Target Markets

##### 3.1.1 International Target Markets

During 2019 the main tourist source markets for the province were mainland Africa (Botswana, Lesotho, Malawi, Mozambique, Namibia, Zambia, Zimbabwe), followed by Europe and America. The key African regional and international target markets that should be earmarked in marketing and product packaging are outlined in the table below.

Figure 17: Main Source Markets to FS

Core Source Markets	Arrivals to FS	Average Length of Stay (LOS) in SA	Highest Repeat Visits	Purpose of Visit (POV)
<b>Lesotho</b> 	878 450	14	10 times+ 89.7%	<b>Main purpose of visit:</b> VFR: 75.9% Shopping: 8.2% Holiday: 2.1%
<b>Botswana</b> 	17 714	4.7	10 times+ 66.1%	<b>Main purpose of visit:</b> VFR: 34.9% Shopping/Business: 23.9% Holiday: 10.3%
<b>USA</b> 	4 699	14	1 <sup>st</sup> time 67.9%	<b>Main purpose of visit:</b> Holiday: 40.4% VFR: 28.7% MICE: 9.6%

Core Source Markets	Arrivals to FS	Average Length of Stay (LOS) in SA	Highest Repeat Visits	Purpose of Visit (POV)
<b>Malawi</b> 	3 751	14.9	10 times+ 42.7%	<b>Main purpose of visit:</b> Shopping/Business: 41.7% VFR: 29.7% Holiday: 12.4%
<b>Namibia</b> 	3 762	9.9	10 times+ 59.1%	<b>Main purpose of visit:</b> VFR: 27.6% Shopping/Business: 23.7% Holiday: 15.6%
<b>China</b> 	2 323	19.1	1 <sup>st</sup> time 45%	<b>Main purpose of visit:</b> VFR: 31.6% Holiday: 28% Business: 15.1%
<b>Germany</b> 	4 858	19	1 <sup>st</sup> time 62.5%	<b>Main purpose of visit:</b> Holiday: 32% VFR: 22% MICE: 4%
<b>Zimbabwe</b> 	3 041	4.8	10 times+ 55.7%	<b>Main purpose of visit:</b> Personal Shopping: 48.9% Business Shopping: 22% VFR: 16.1%
<b>Netherlands</b> 	2 625	18.2	1 <sup>st</sup> time 59.1%	<b>Main purpose of visit:</b> Holiday: 64.1% VFR: 15.9% Business: 7%

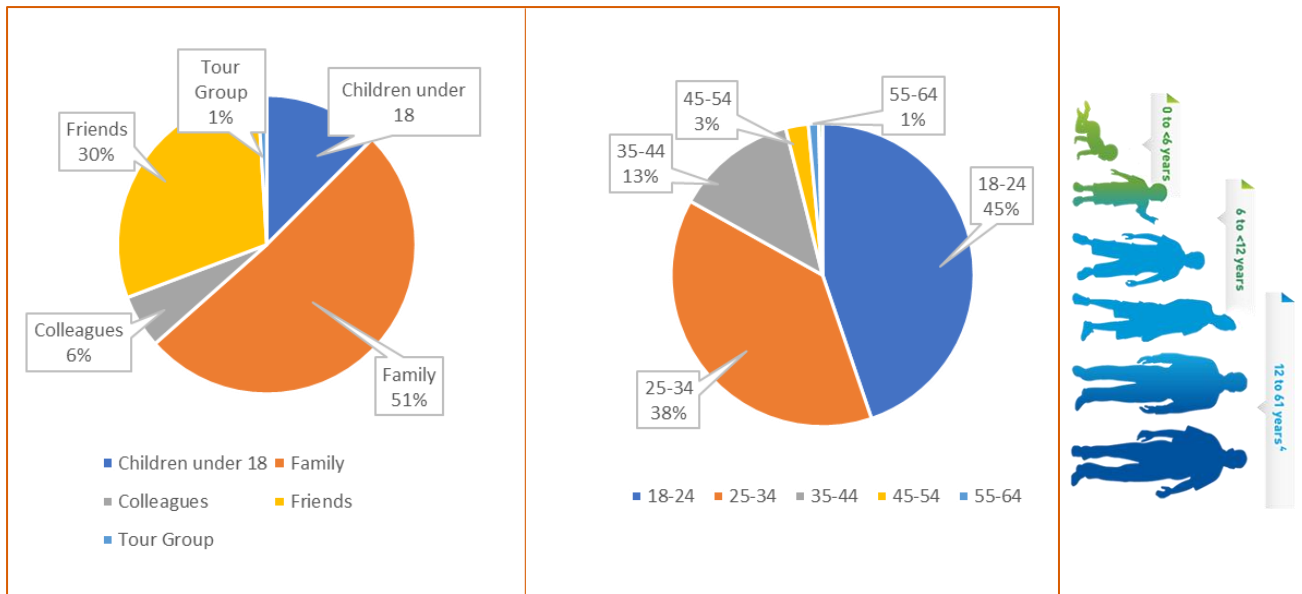
Source: SAT Annual Tourism Report 2019

### Market Characteristics

Most of the international visitors travel to the province with family and/or friends, 51% and 30%, respectively. This is followed by travelling with children under the age of 18 and colleagues. These figures reflect product packaging opportunities for the province to target families and groups of friends.

International tourists to the Free State fall within the younger demographic, with the largest share of tourists in the categories of 18–24 and 25–34 years of age. The province should review its offerings aimed at younger crowds. Nightlife, entertainment and adventure activities are popular among these visitors, and product innovation in this space is needed to appeal to these markets.

Figure 18: International Market Travel Behaviour and Age Categories



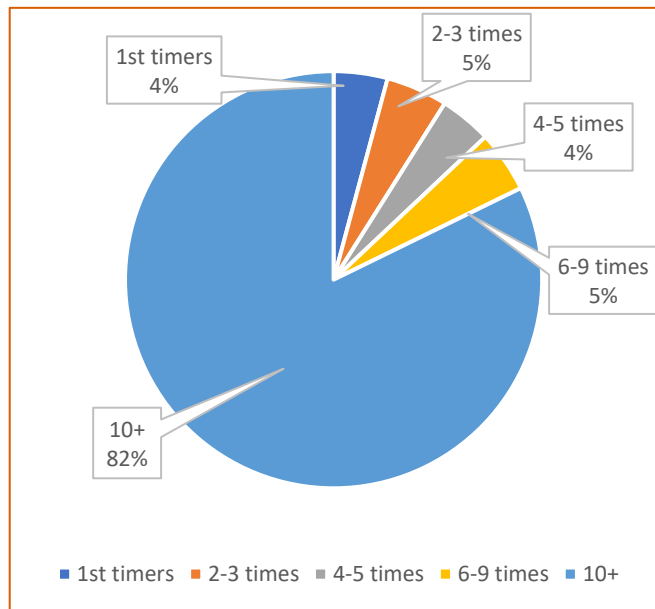
Source: SAT Annual Report 2019

The main purpose of visit to the province is to visit friends and family; these markets can be captured through mid-week and off-season special-cost packages. Interactive and adventure experiences will appeal to the younger markets who prefer to travel with friends.

*Repeat Visits*

A constant increase in first-time visits to the province is a good sign that people are interested in exploring what the Free State has to offer and that its tourist product is relevant. Visitors who come to the province for their tenth visit or more are strongly represented at 82% of visitors. This reflects positively on the reliability of the products and services offered as well as visitor satisfaction.

Figure 19: International Repeat Visits 2019



Because the province is seeing the same visitors repeatedly, it should not only expand

on its tourism offerings but also package existing products to appeal to the relevant target markets.

The province should aim to increase first-time visits and transform those once-off visits into repeat

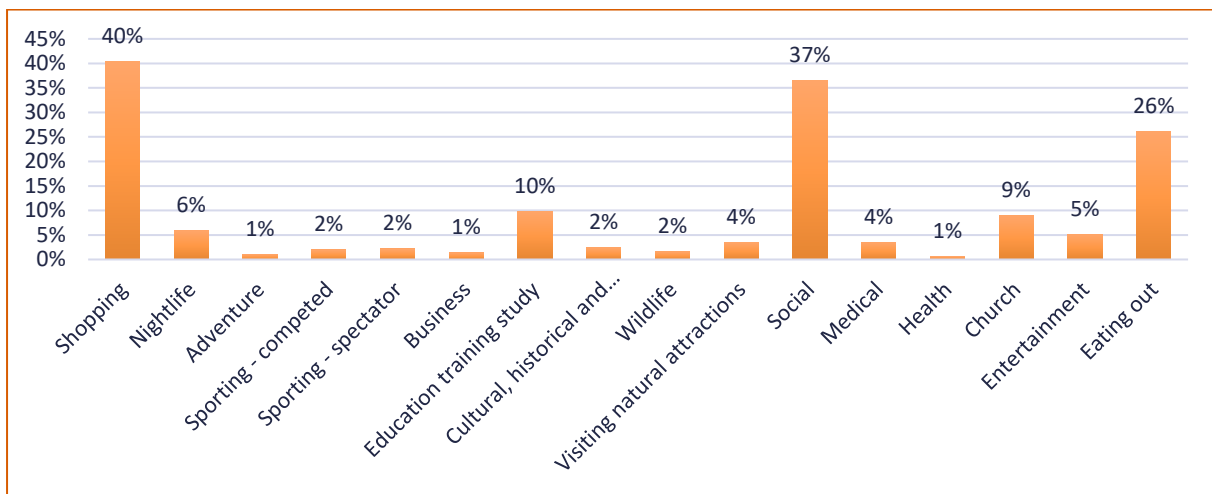


visits. Overall, while repeat visits to the province show promising results, there is room for improvement.

*Purpose of Visit/Activities*

The main international purpose of visit in the Free State is visiting friends and family at 72.4%, followed by shopping and holiday purposes at 7.5% and 3.5%, respectively. Apart from shopping, other main activities that these visitors engage in include socialising, nightlife, eating out and entertainment. Natural attractions, church events/funerals and education are also prominent activities.

Figure 20: Main Activities of International Visitors

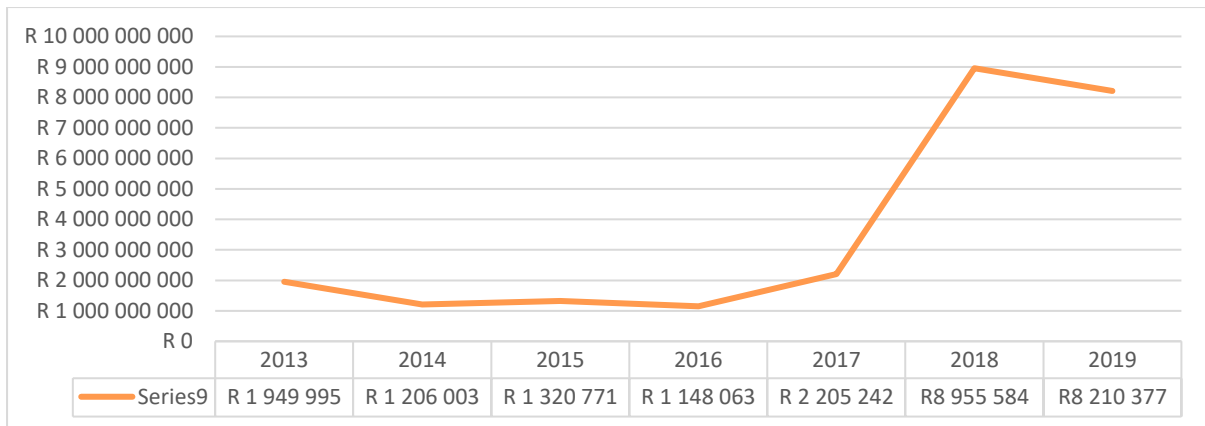


Source: SAT Annual Tourism Report 2019

*Expenditure*

International expenditure in the province saw a steady rise from 2013 to 2016 and a sharp increase in 2017. There has since been a slight decrease year-on-year, with R11.3 million reported in 2019. Multiple factors may contribute to the decline, relating to economic conditions, visa regulations and a decrease in the length of stay in the province.

Figure 21: International Expenditure Free State Trend (R billion)

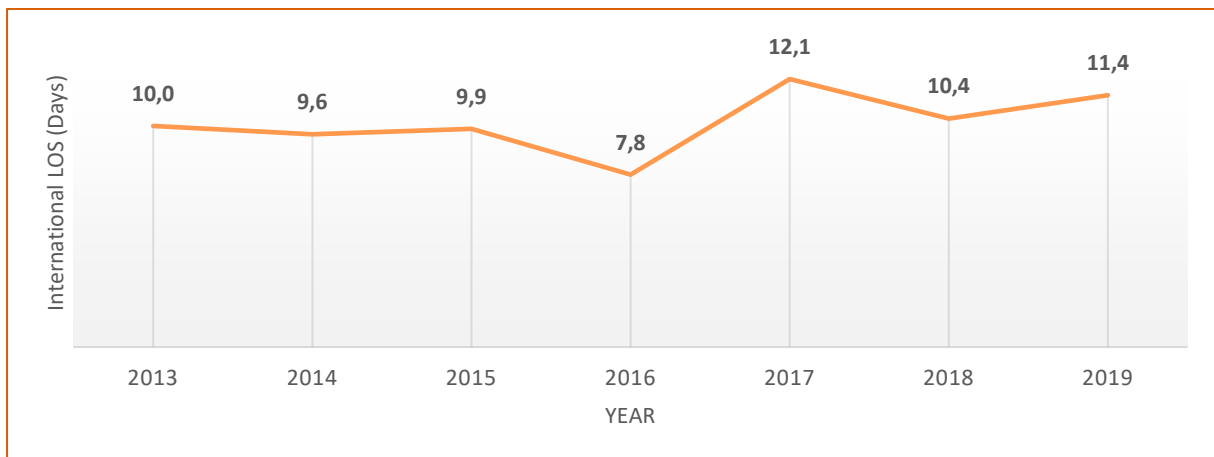


Source: SAT Annual Tourism Report 2019

### Length of Stay Trend

Linking directly to the international expenditure trend, the province experienced a decreased LOS (length of stay) in 2016, with a sharp increase the next year. This was followed by a slight dip in 2018 which rounded off at 11.4 days in 2019. The longer the province can convince visitors to stay, the more money visitors spend in the destination, which ultimately leads to increased revenue for the province. The trends confirm this where a decrease in LOS corresponds with a decrease in expenditure and vice versa.

Figure 22: Free State International LOS Trend

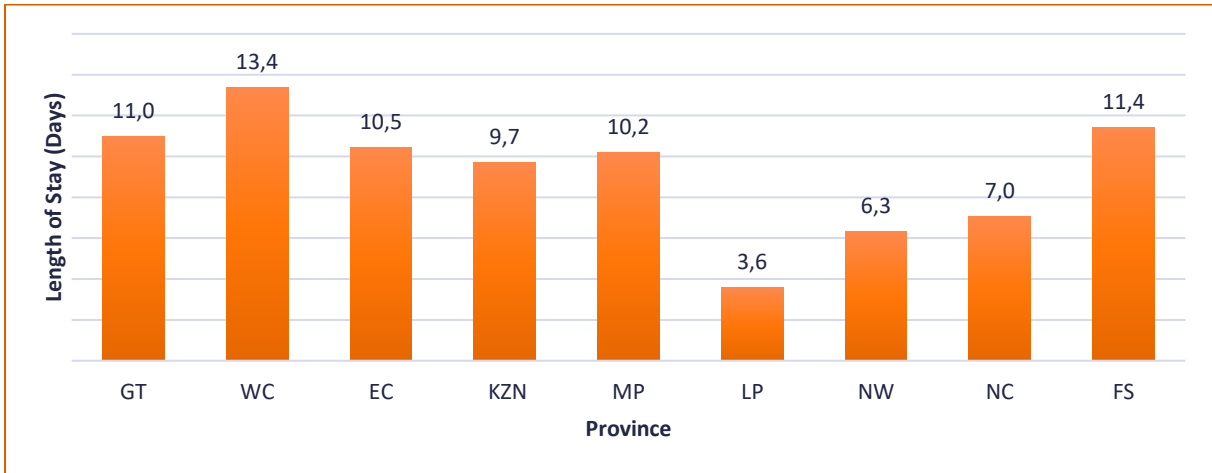


Source: SAT Annual Tourism Report 2019

The Free State province proves to be competitive when it comes to the length of stay, placing second in the country with 11.4 days, after the Western Cape, which reported 13.4 days. This is a very positive indicator as it confirms that the tourists are spending sufficient time in the province; however, the aim

is to get them to spend more money in the region through participation in tourism activities and making use of formal accommodation.

Figure 23: Length of Stay per Province



Source: SAT Annual Tourism Report 2019

### 3.1.2 Domestic Target Markets

Most domestic tourists to the Free State are from the province itself, represented at 36.7%, followed by tourists from Gauteng and Eastern Cape, each at 25%. Limpopo and Western Cape represent the least visitors—this provides an opportunity for those markets and their travel preferences to be identified. Stronger marketing approaches are also needed to reach the right markets.

Comparing prominent travel motives, all the provinces' main purpose of visit was visiting friends and relatives, followed by travelling for holiday purposes.

Figure 24: Domestic Markets to FS

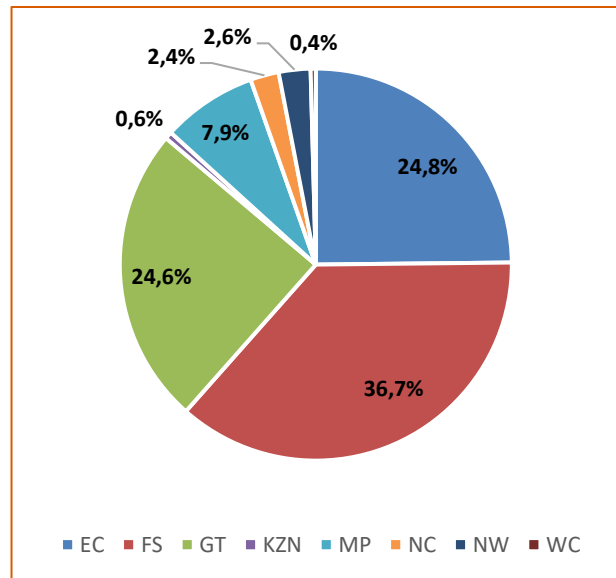
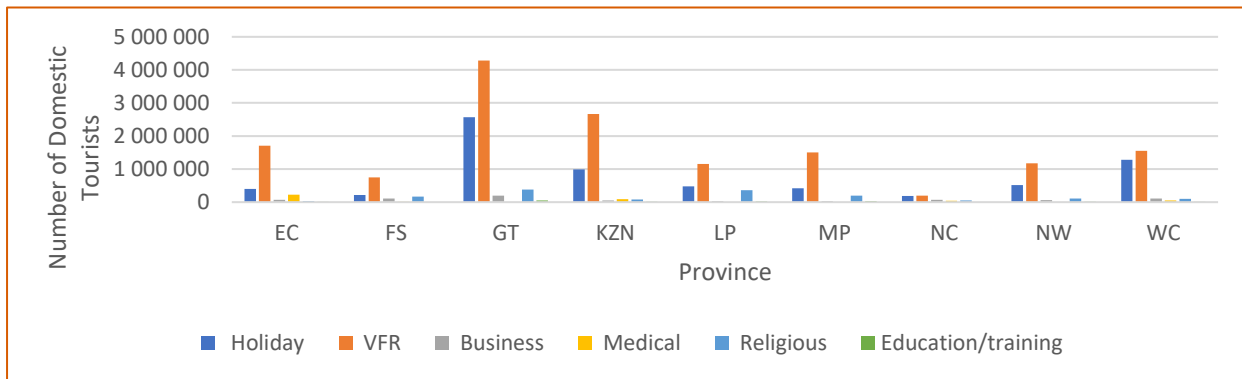


Figure 25: Purpose of Visit per Province

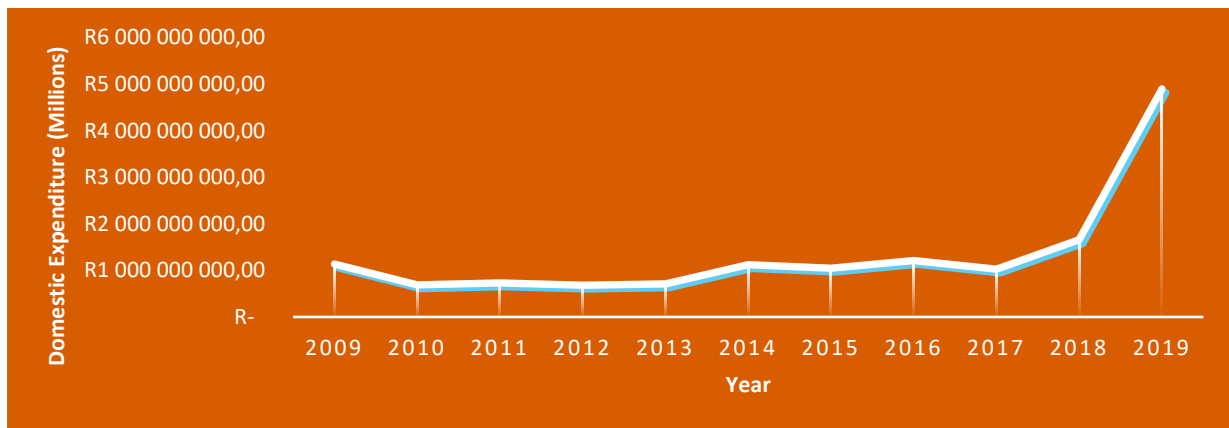


Source: SAT Annual Tourism Report 2019

### Expenditure

Tourism not only creates jobs in the tertiary sector but also encourages growth in the primary and secondary sectors of industry. Tourism multipliers indicate the total increase in output, labour earnings and employment through inter-industry linkages in a region as a result of tourism expenditures. The domestic expenditure for the Free State shows promising results as there has been a steady increase experienced in the last decade. The biggest increase happened from 2018 with R1,6 billion to 2019 with a total of R4,8 billion. This correlated directly with the province’s increased domestic arrivals, bed nights and length of stay as reported on in 2019.

Figure 26: Domestic Expenditure Trend



Source: SAT Annual Tourism Report 2019

### Length of Stay

The length of stay is one of the key elements in a tourist’s decision-making process (Bull 1995) and is of great importance for tourist destinations. Unlike the increase in the length of stay on the international front, the province recorded a decrease in the domestic length of stay. When looking at

domestic arrivals, this means that more domestic visitors are coming to the province, but they are staying for a shorter period.

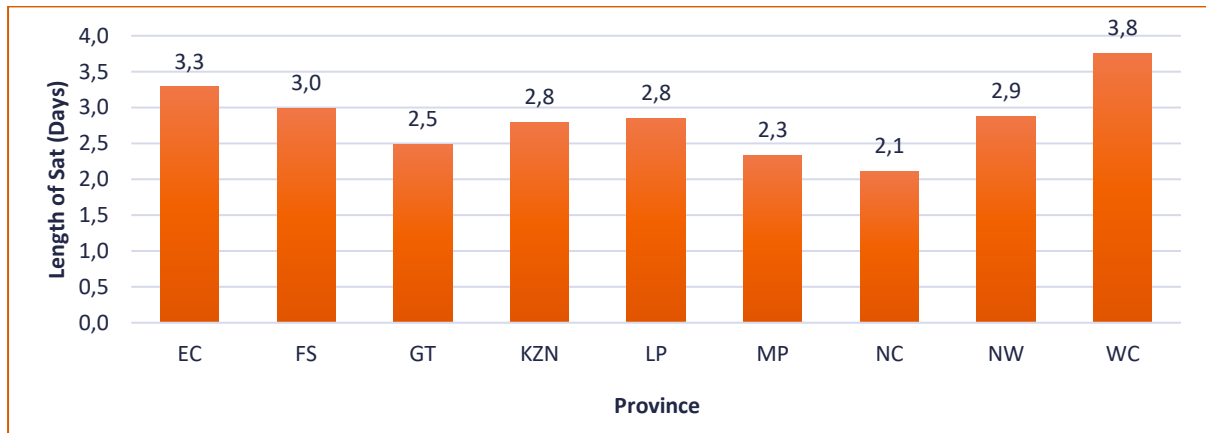
Figure 27: Domestic Length of Stay Trend



Source: SAT Annual Tourism Report 2019

Although the province saw a decrease in domestic length of stay, its average number of days was in line with the rest of the country, following in third place after the WC with 3.8 days and the EC with 3.3 days.

Figure 28: Length of Stay per Province

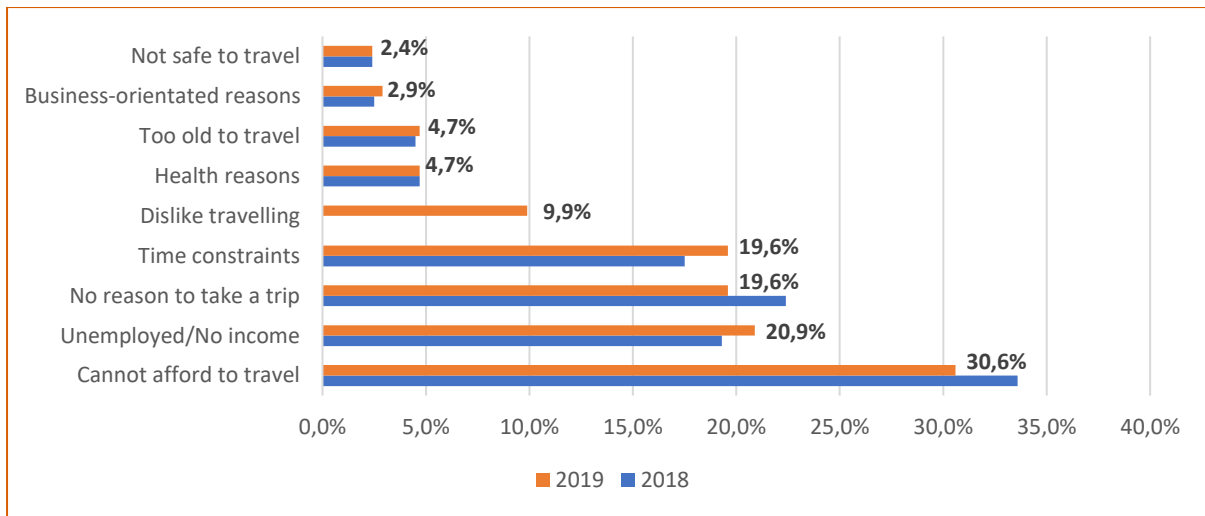


Source: SAT Annual Tourism Report 2019

### Reasons for not Travelling

The two most prominent reasons for not travelling are based more on personal circumstances rather than on complaints about the tourist destination. The main reason is financial—30.6% of domestic tourists argue that, in general, finances prevent them from travelling, i.e. it is too expensive for them to travel.

Figure 29: Reasons for not travelling



Source: SAT Annual Tourism Report 2019

The second reason for not travelling relates to unemployment (20.9%), where the associated lack of income makes travelling impossible. No reason to take a trip and time constraints were the following main reasons, each accounting for 19.6%. Age and health conditions also have an impact on travel motives.

### 3.2 Unique Selling Point

The current main marketing approach is through district tourism routes. The established five tourism routes link attractions between towns and offer opportunities to promote evenly spread visits within the province. The province prides itself in its natural tourism attractions along the Big 5 routes, namely:

- The Cheetah Route, home to Bloemfontein, Botshabelo and Thaba Nchu, is filled with historical, cultural and natural attractions. Other places on this itinerary include the Naval Hill Precinct, where the iconic 6.5m-tall bronze statue of Nelson Mandela stands, and Loch Logan Waterfront<sup>7</sup>.
- The Eagle Route runs from Ficksburg to Harrismith through some of the most picturesque landscapes in the country with iconic rock formations and activity highlights including cherry-picking, rock paintings, arts and crafts, shopping, and 4x4 trips.



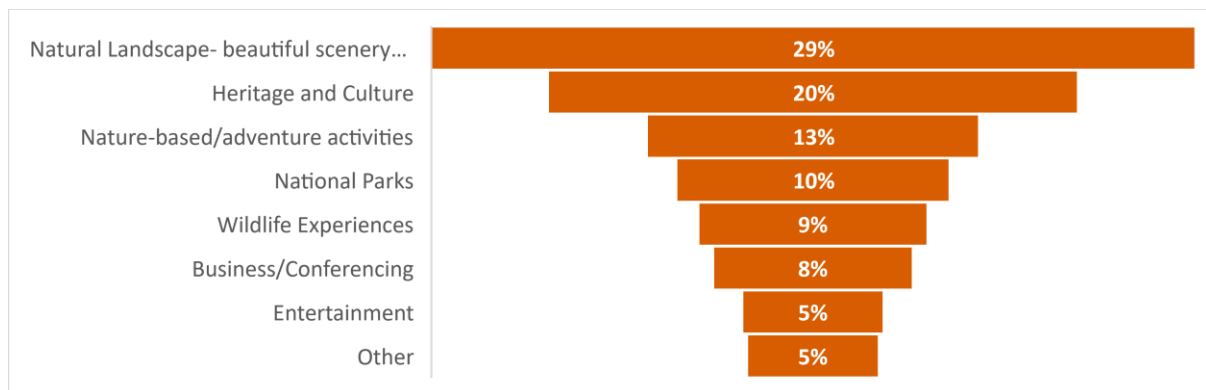
<sup>7</sup> IOL. 2019. 5 Free State routes to add to your bucket list.

- The Lion Route is situated in Fezile Dabi district and comprises Deneysville, Sasolburg, Parys, Vredefort and Kroonstad and is also home to the Vredefort Dome, which is the world’s largest and oldest known meteorite-impact site.
- In the Lejweleputswa District, the Flamingo Route offers a variety of sporting and leisure activities with the Phakisa Freeway Racetrack, game viewing and historical sites to enjoy.
- The best sunrise is viewed in the Springbok Route, which connects the Free State with the Northern Cape, winds through the scenic farmlands and nature reserves of the Xhariep district, and is interspersed with historical attractions that include battle sites, and San rock engravings and game farms<sup>8</sup>.

One of the most important considerations is to spread the economic benefits more widely by developing tourist facilities, activities and services along tour routes in a manner that will facilitate tourist spending at these stopover points to provide additional employment and income, both directly and indirectly<sup>9</sup>.

In the survey that was conducted (January/February 2021) to determine the perception that tourists have of the Free State, they were asked what is the first thing that comes to mind when they think of the Free State and also to indicate whether they have visited or are aware of some of the main attractions in the Free State. This provides insight into how effectively the province is marketing itself and also indicates the extent of awareness of what the destination has to offer. The results are as follows.

Figure 30: Survey: What comes to mind when you think of the FS province?



Source: Survey Conducted by UE in Jan–Feb 2021

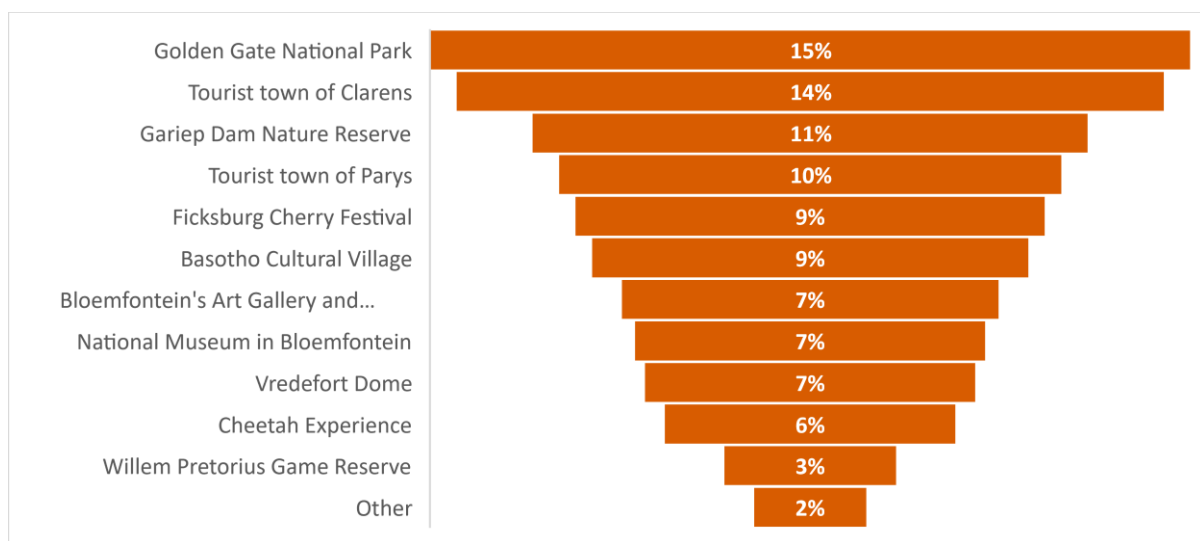
<sup>8</sup> South African Government 2019. Free State Tourism commemorates Tourism Month.

<sup>9</sup> Meyer (2004)

The first thing that comes to mind when people think about the Free State is its natural landscapes and scenic beauty, which are one of the province’s strengths. This is then mirrored with heritage and cultural offerings as well as nature-based products and activities. This confirms that people are aware of tourism product ‘themes’ associated with the province; however, they lack knowledge of the number and type of attractions that are available within each ‘theme’. This is where stronger marketing is needed to convey that information to tourists.

The majority of respondents were aware of or have visited the Golden Gate National Park, followed by Clarens, the Gariiep Dam and Parys.

Figure 31: Survey: Which of the following attractions in the FS are you aware of?



Source: Survey Conducted by UE in Jan-Feb 2021






While Free State, like other tourism destinations, is known for its **main tourist attractions**, it is crucial to uplift all the other attractions that contribute to the province’s uniqueness. The survey confirmed that although people are aware of some of the main attractions in the province, they are not entirely aware of the scope of diverse attractions and activities that are on offer.

### 3.3 Niche Development Potential

The following niche development areas were identified during stakeholder engagement sessions and are further unpacked in Section 5.

Niche Area	Description
Health and Wellness	Health and Wellness Tourism involves travelling to another city to receive medical or wellness services. Tourists are seeking health and wellness trips more than ever before, and destinations are responding with services and experiences such as



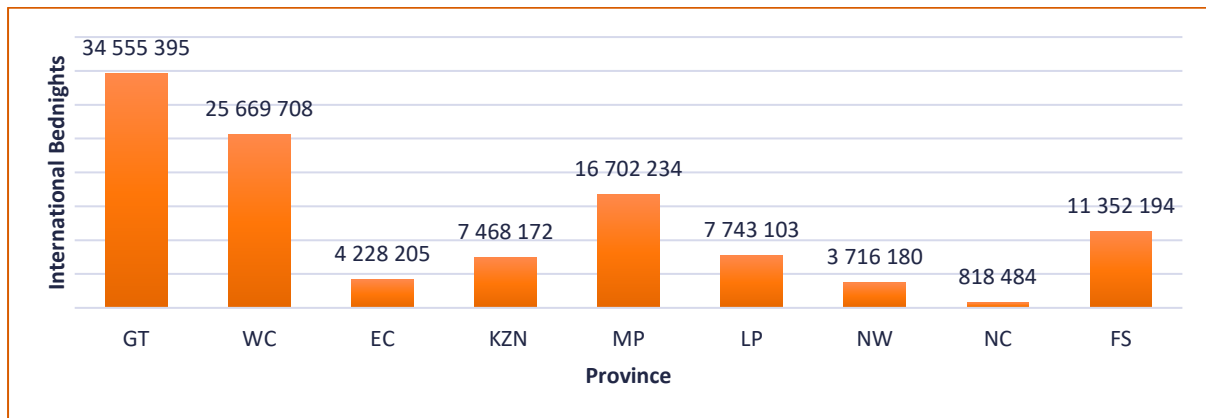
Niche Area	Description
	<p>health and wellness seminars led by popular health experts, custom fitness programmes, stress management, spa services and other offerings dedicated to weight management and healthy living. The natural landscape of the FS province makes it possible to provide such offerings in beautiful, outdoor/nature-related settings. Many may be seeking wellness packages and spiritual refreshment after an unprecedented period of unsettlement in their life during the pandemic.</p>
<p><b>Agritourism</b></p> 	<p>Agritourism means travel organised around farming, small-scale food production or animal husbandry. Farmer's markets, wine tourism, cider houses and corn mazes all constitute examples of agritourism. The FS province is the 'breadbasket' of SA—there are multiple opportunities to leverage on this. The province also hosts Nampo (one of the largest agricultural exhibitions under private ownership), which is the biggest of its kind in the southern hemisphere.</p>
<p><b>Dark Tourism</b></p> 	<p>Dark tourism (also known as black tourism, thanatourism or grief tourism) is tourism that is associated with death or tragedy. Attractions might include cemeteries, war sites or historical museums. The FS is rich in war history, and many heritage and cultural products which are spread across the districts. This is a niche that should be investigated and uplifted as part of the FS's tourism offerings.</p>
<p><b>Glamping</b></p> 	<p>Glamping (a portmanteau of "glamorous" and "camping") describes a style of camping with amenities and, in some cases, resort-style services not usually associated with "traditional" camping. Opportunities for this niche have been identified in the FS, namely in the Fezile Dabi District and Southern Free State (Letsatsi Game Lodge outside Smithfield). Beautiful natural landscapes make it possible to develop this kind of offering, where tourists can enjoy luxury in the outdoors.</p>
<p><b>Culinary Tourism</b></p> 	<p>Culinary tourism or food tourism involves the exploration of cuisine. This aspect of a destination may be considered a vital component of the tourism experience. Very often, tourists will dine in local restaurants when they are on holiday. Various types of restaurant fall into several industry classifications based upon menu style, preparation methods and pricing. Additionally, how the food is served to the customer helps to determine this classification.</p>

### 3.4 Competitiveness

#### 3.4.1 Arrivals

Although the province has seen some growth in the number of arrivals since 2013, this growth has not been sufficient to enhance its competitiveness as a tourism destination in comparison to the other provinces. The figure below illustrates the foreign tourist arrivals over the past few years.

Figure 32: International Bednights per Province

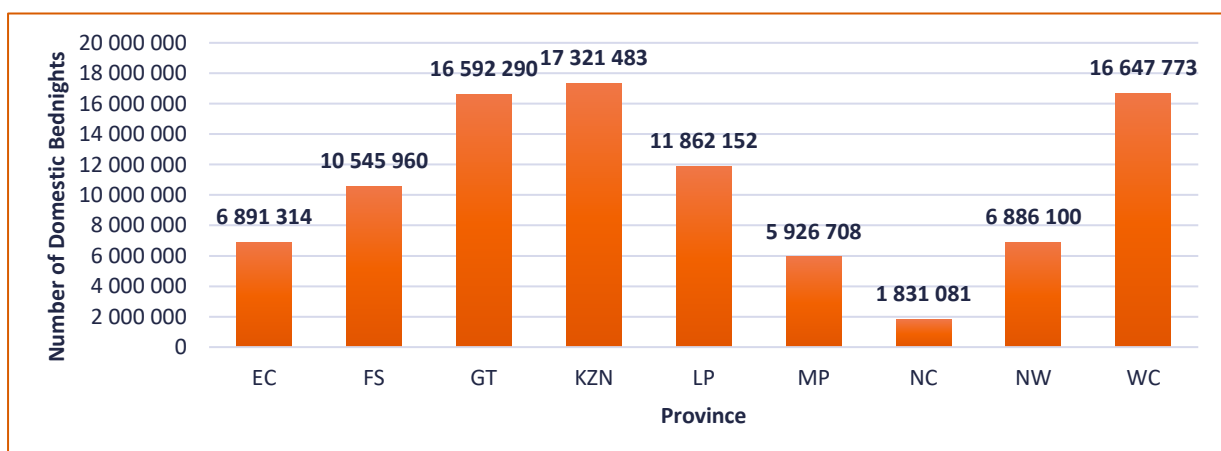


Source: SAT Annual Tourism Report 2019

In comparison to the other provinces, the Free State was the fourth-best performer in the number of international bednights.

Meanwhile, the Free State placed fifth in the number of domestic bednights with a total of 10.5 million bednights in 2019. There is an opportunity for the province to capture the Gauteng markets as the perfect road trip/getaway destination from the busy city life. Special weekend and affordable off-season packages should be developed to encourage the domestic market to travel more.

Figure 33: Domestic Bednights per Province

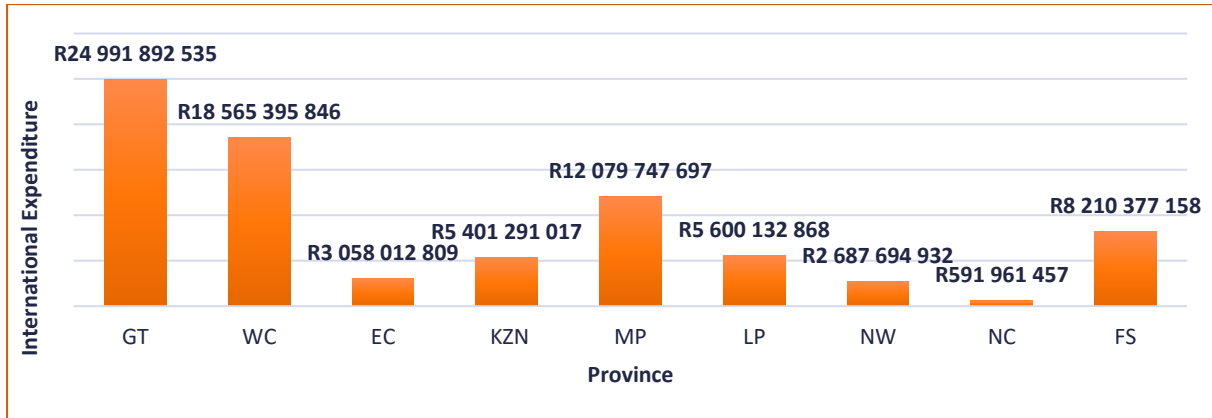


Source: SAT Annual Tourism Report 2019

### 3.4.2 Tourism Expenditure

Provincially, in 2019, Gauteng represented the largest portion of total annual international spending in South Africa with just over R24.9 million, while the Western Cape came in second with R18.5 million.

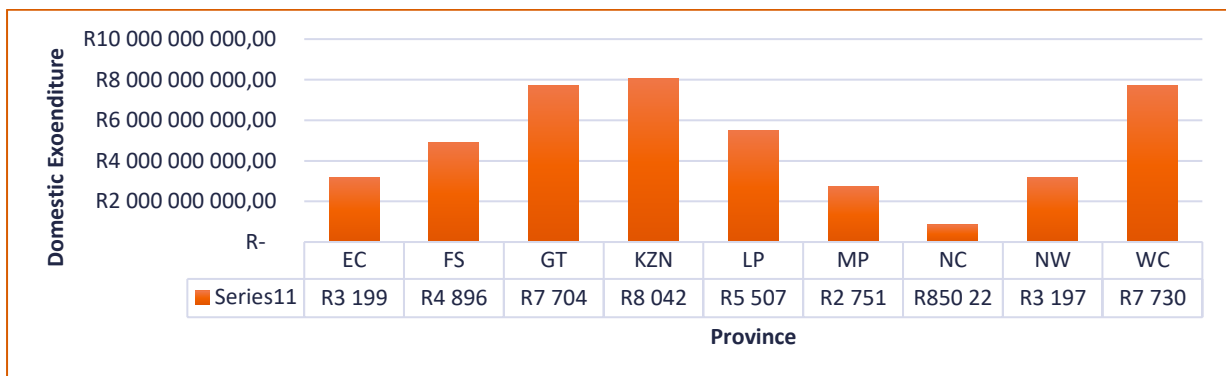
Figure 34: International Expenditure per Province



Source: SAT Annual Tourism Report 2019

The Free State placed fourth in the category; the province is competitive in this regard by outperforming the Eastern Cape, North West, Limpopo, Northern Cape and KwaZulu-Natal provinces.

Figure 35: Expenditure per Province

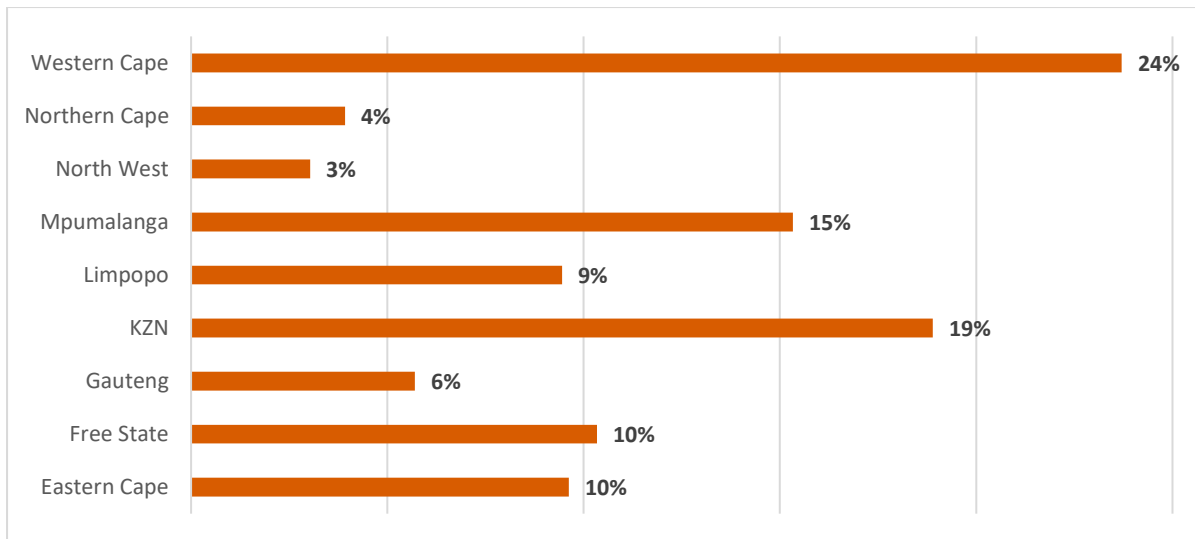


Source: SAT Annual Tourism Report 2019

Domestic tourism expenditure in the Free State increased by 34% from 2018 to 2019 placing the province in the fifth position compared to the other provinces. By strengthening its marketing approaches and developing more target market-focused product packing, domestic tourism has the potential to substantially increase and thereby increase tourism expenditure as well.

In the survey, tourists were asked to indicate their top travel destinations in South Africa. The coastal provinces, especially KZN and WC, proved to be the top destinations.

Figure 36: Survey: Preferred provincial tourism destinations



Source: Survey Conducted by UE in Jan-Feb 2021

Respondents indicated that tourists prefer to travel to coastal provinces, especially now, in the COVID-19 climate, to escape the restriction of their homes and embrace nature. The Free State, with plenty to offer in this regard, can provide the ideal escape for tourists. The success of this depends on destination readiness, the provision of a range of activities that tourists can choose from, and more aggressive marketing in general.

### 3.5 Positioning

#### 3.5.1 Location

The Free State shares borders six other provinces and the Mountain Kingdom of Lesotho. It is a summer-rainfall region with a mean annual rainfall of 532 mm, and its climate, soil types and topography vary greatly within the province, with plains in the west and mountains in the east. The western and southern areas are semi-desert, with some Karoo vegetation occurring in the south. The Orange and Vaal rivers define the southern, western and northern borders of the Free State<sup>10</sup>.

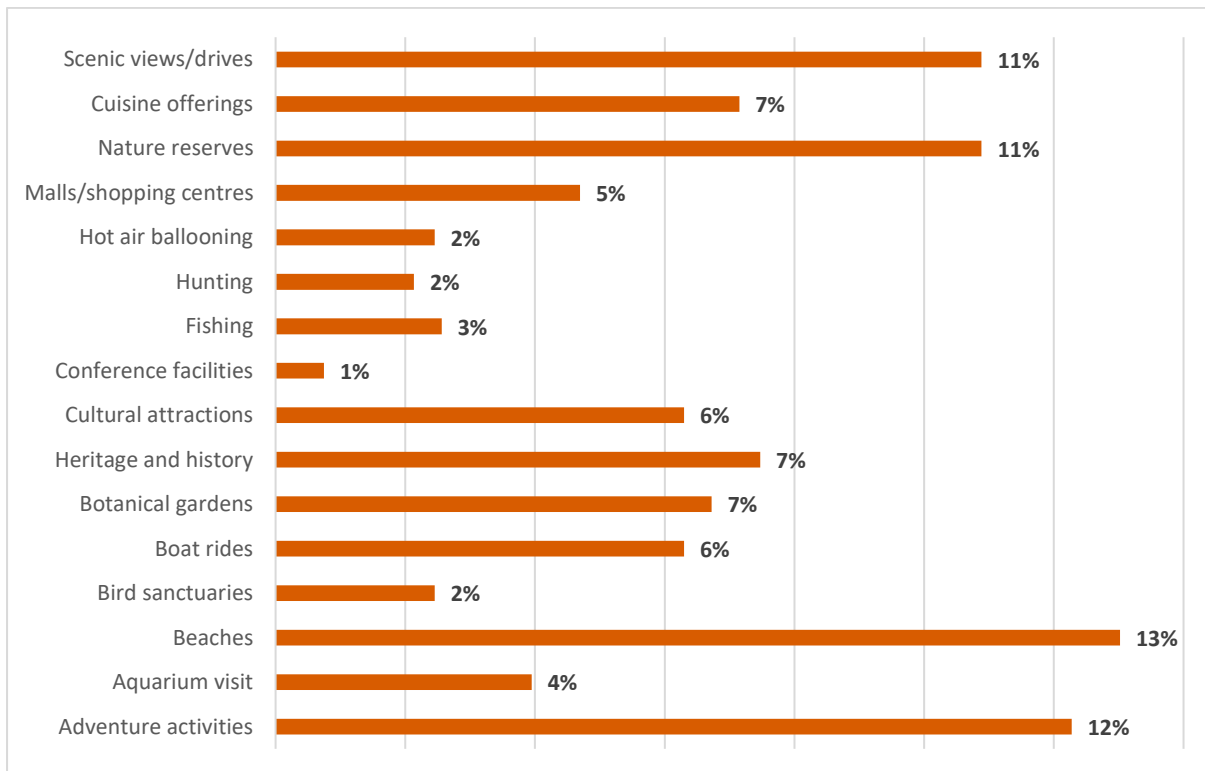
The province has a significant advantage in terms of where it is located—at the heart of the country, providing easy access from various neighbouring provinces as well as Lesotho. Developing linkages with these neighbouring destinations and collaborating on product packaging will allow for the diversification of tourism offerings and also strengthen stakeholder relationships in this regard. The province is also easily accessible through major routes and airports.

<sup>10</sup> Global Africa Network- What does the economic future of the Free State look like?

As a tourism destination, the province is the ideal getaway from the busy city life as it affords tourist a road trip opportunity. The province is the perfect road-less-travelled—a pioneering, rustic destination, far from the busy city life and crowds of people, filled with unique spaces and experiences in picturesque settings.

The survey shows that many of the preferred activities (apart from coastal offerings) in which tourists participate are located within the Free State and should therefore be leveraged in marketing approaches and product planning.

Figure 37: Survey: What are the main activities you like to engage in while travelling?

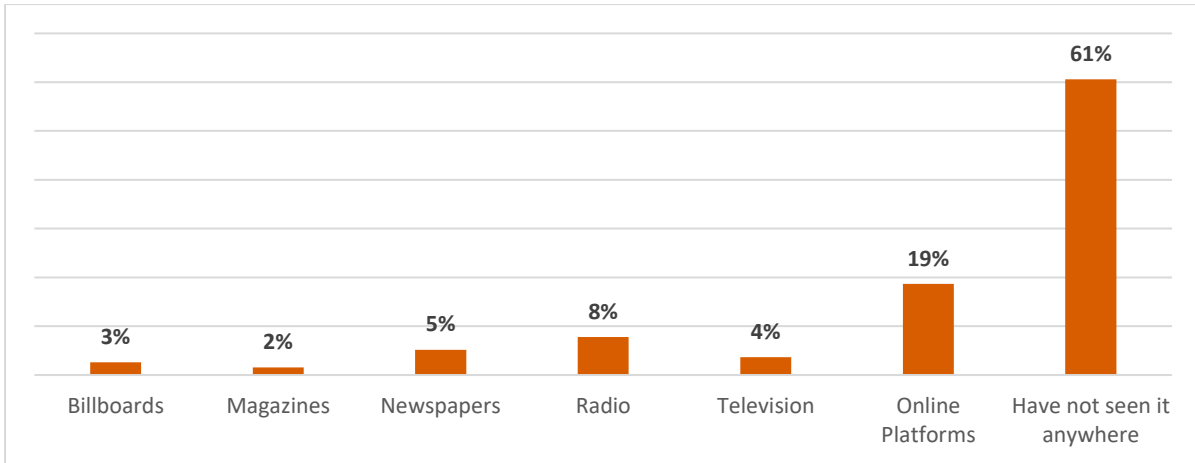


Source: Survey Conducted by UE in Jan-Feb 2021

Marketing and promoting efforts in the Free State are being challenged with the majority of respondents (61%) indicating that they have not seen any form of Free State tourism marketing in the last three months. This is indicative of the following concerns:

- The province is not being marketed enough.
- Marketing efforts are not mobilised on the right marketing channels as they are not reaching the markets.

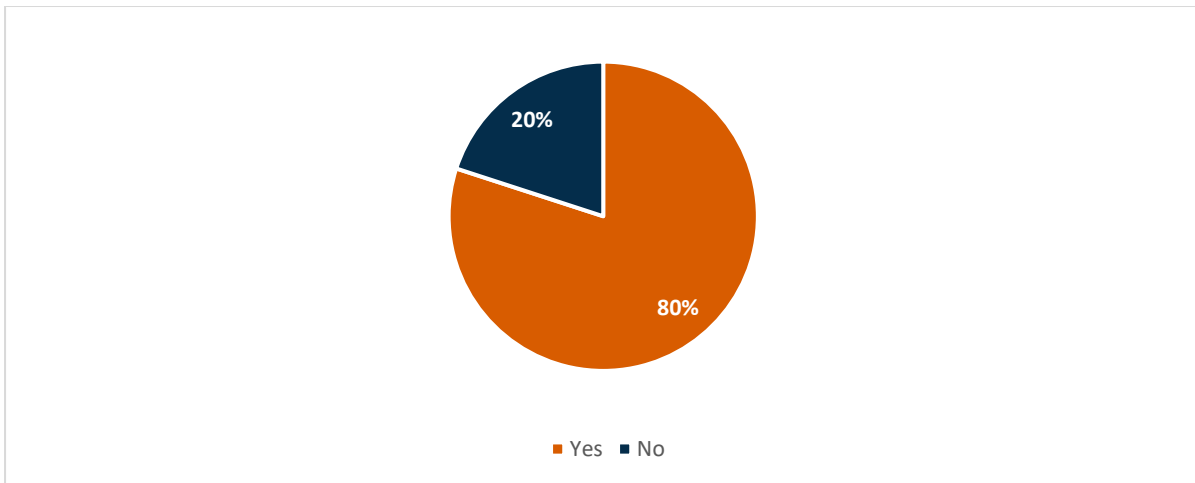
Figure 38: Survey: Have you seen advertising of the Free State in the past 3 months?



Source: Survey Conducted by UE in Jan–Feb 2021

Tourists were also asked, in light of the previous question, if they would like to see more advertising on the Free State’s tourism offerings.

Figure 39: Survey: Would you like to see more advertising on the Free State's tourism offerings?



Source: Survey Conducted by UE in Jan-Feb 2021

The results confirm that there is interest in the province and its products and services. Respondents also indicated that they are not aware of everything that there is to do and experience in the province. If the province and its offerings are marketed better across all the various communication platforms—especially online platforms—people will be more enticed to visit and explore the province.

### 3.5.2 Domestic Tourism Potential

Domestic tourism in the Free State is thriving, especially among those living in the province. This is an advantage in the current COVID-19 climate as the focus is now on the domestic markets to recover the tourism sector from the pandemic’s impact. Ways in which this can be strengthened include:

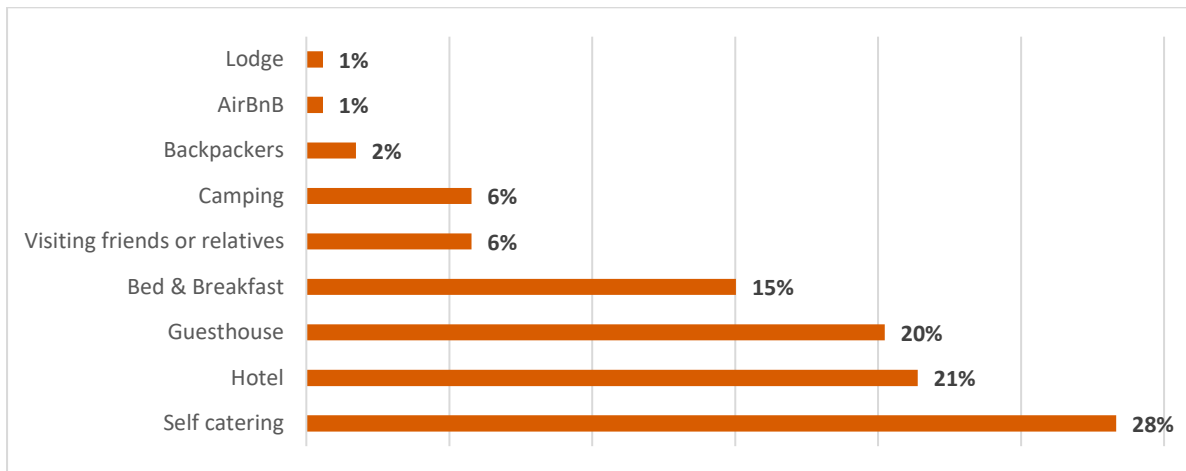
- Developing an integrated “brand” for the whole province as a destination that encompasses a single identity from a tourism, business, policy and leadership perspective.
- Enhancing the brand narrative by leveraging off other sectors, including agriculture, broadband, film, and craft and design.
- Managing the negative perceptions around the safety of the destination and creating a positive and caring atmosphere for tourists in distress.

Plans should be in place for marketing activities and incentives that will facilitate domestic travel and encourage increased length of stay. This can include more competitive prices, special promotions or travel incentives by employers, especially to destinations that are heavily reliant on tourism.



According to the survey results, self-catering, hotel, guesthouse and bed and breakfast accommodation are preferred when visiting the Free State. Respondents indicated that the Free State is affordable and that self-catering accommodation is a better fit for budget-conscious tourists.

Figure 40: Survey: Preferred type of accommodation



Source: Survey Conducted by UE in Jan-Feb 2021

### 3.5.3 Transit Market Potential

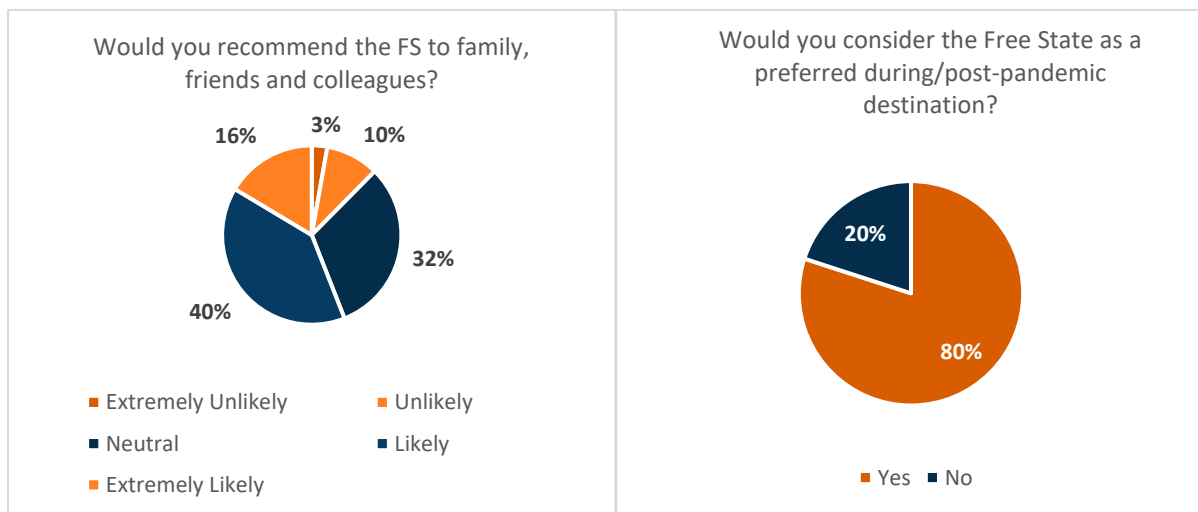
The Free State is a prominent transit ‘region’ with many tourists from neighbouring provinces (North West, Gauteng, Limpopo and Mpumalanga) driving through the Free State to reach the coastal regions. Those who merely pass through and do not stay to explore the province are the perfect markets to target to experience more of what is on offer in the Free State. The province should be marketing itself as the main destination and not be known as a drive-through province. The aim is to entice those markets to spend more time in the province, participate in more activities and spend more in the region. This entails unlocking the full potential of the Free State in terms of its geographical

position and the scope of offerings that accommodate various travel appetites. The income generated can be beneficial to local communities, help to improve infrastructure, fund further tourism development and promote responsible tourism practices in the province. Many respondents in the survey indicated that they simply drive through the Free State on their way to the coast; however, if there was stronger awareness of activities and products created through effective marketing, people might decide to spend more time in the destination.

### 3.5.4 The Free State as a Recommended Tourism Destination

The main aim of the survey was to determine why people come to the province, what they enjoy about it most and whether they would consider the Free State as a travel destination, especially during the pandemic. Most people indicated that they would recommend the FS to friends and family, however, there are quite a few who feel undecided on the matter. The aim is to change those neutral responses to a more positive ‘likely’ or ‘highly likely’. A total of 80% of respondents said that they will consider the FS as a travel destination amidst/post the pandemic, which is a very good indicator of future visits and support for the province

Figure 41: Survey: Would you recommend the FS to family and friends and visit the province during/post-pandemic?



Source: Survey Conducted by UE in Jan-Feb 2021

Respondents’ main reasons for why they would/ would not recommend/visit the Free State are listed below.

I would recommend the FS because:	I would not recommend the FS because:
Some beauty in the Free State you would not find anywhere else	I would rather go to the coastal areas after not being able to go out for so long
Freedom of movement—outdoors is preferred now when travelling	I would rather travel somewhere else where I can scuba dive after the pandemic



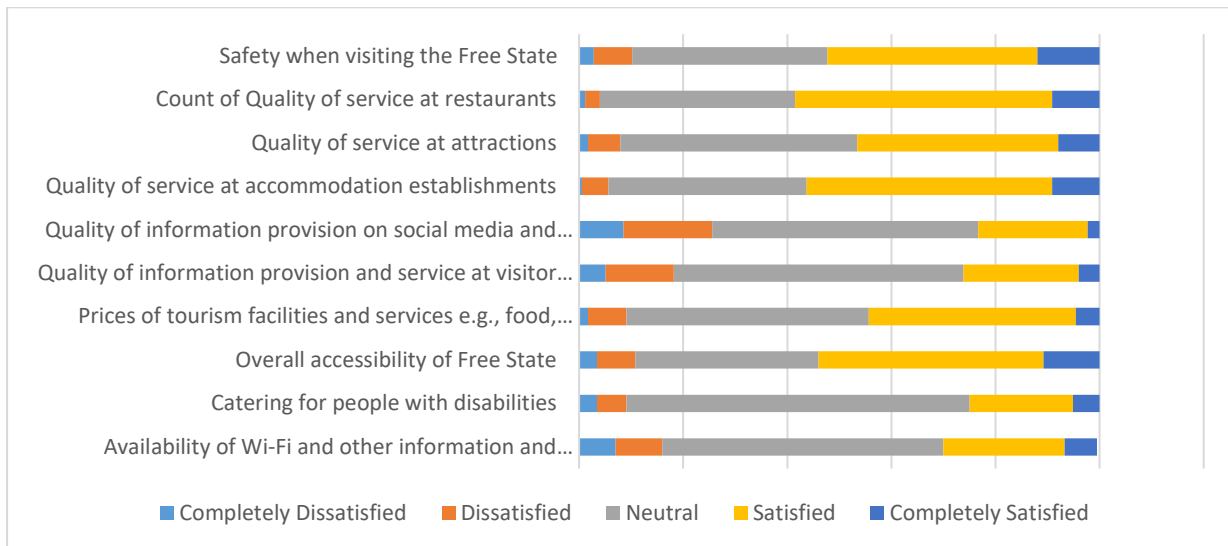
I would recommend the FS because:	I would not recommend the FS because:
Beautiful vistas and landscapes and a very relaxing environment	Only if product diversification and tourism signage improve
The FS is affordable (budget-friendly) and offers rich experiences	There is not enough to do—not enough activities to engage in
The Free state is beautiful and full of various activities that might attract friends and family	The province is disorganised—access to information is a problem
The province is easily accessible	There is no marketing, so there is no knowledge of what the province has to offer
The natural landscape is exquisite	Facilities are not on standard/well-maintained
The people are friendly and there is service excellence at accommodation establishments	The tourism routes are not functioning effectively
Ideal for escaping from the busy city life and the noise	Safety is a challenge

Source: FS Perception Survey 2021

### Tourism Service Delivery Satisfaction

As part of the province’s drive to improve service excellence and uphold sector standards, it is important to determine the level of satisfaction with the services that are provided to tourists. Survey respondents were asked to rate their satisfaction with the following services.

Figure 42: Survey: How would you rate the following service offerings in the Free State?





Source: Survey Conducted by UE in Jan-Feb 2021


A common theme that was identified with the survey results is the lack of marketing and awareness of the offerings in the Free State. Tourists indicated dissatisfaction with the provision of and access to quality tourism information (especially on online platforms such as product websites and social media). This links to the dissatisfying experiences noted at tourism information offices (or the lack thereof).



### 3.6 Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis

The following strengths, weaknesses, challenges and opportunities were identified for the Free State’s tourism sector.

Table 2: Tourism sector SWOT analysis

Thrusts	Strengths	Weaknesses	Opportunities	Threats
<b>Accessibility</b> 	<ul style="list-style-type: none"> <li>➤ Bloemfontein (capital city) is easily accessible through South Africa’s major international airports in the cities of Johannesburg, Cape Town and Durban.</li> <li>➤ Free State prides itself on natural and cultural attractions through the tourism routes.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Lack of suitable public transport between and within towns to attractions.</li> <li>➤ The poor condition of road infrastructure.</li> <li>➤ Lack of access to Wi-Fi at tourism hubs.</li> <li>➤ Lack of sufficient signage provision.</li> </ul>	<ul style="list-style-type: none"> <li>➤ The Free State is centrally located and can take advantage of this position.</li> <li>➤ The Free State should aim to capture the through-flow of Gauteng tourists travelling to the coastal provinces.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Bad road infrastructure is unsafe and poses a hazard to visitors/prevents repeat visits.</li> </ul>
<b>Destination Marketing</b> 	<ul style="list-style-type: none"> <li>➤ Location of the Province—at the heart of South Africa.</li> <li>➤ Known as the agricultural epicentre/ “breadbasket” of the country.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Lack of focused vision for the tourism sector.</li> <li>➤ A lack of information to guide planning and development.</li> <li>➤ Generally insufficient marketing approaches.</li> <li>➤ Insufficient funding to carry out marketing efforts.</li> </ul>	<ul style="list-style-type: none"> <li>➤ The adoption of social media technology.</li> <li>➤ Advertising the province as a key business and events destination.</li> <li>➤ Improved marketing strategies that include the branding of the Free State destination.</li> <li>➤ More targeted approach when it comes to markets.</li> </ul>	<ul style="list-style-type: none"> <li>➤ The tourism offices of most local authorities in the Free State are regarded as disorganised in their operations and unable to provide accurate/relevant information.</li> <li>➤ Safety perception of SA.</li> </ul>

Thrusts	Strengths	Weaknesses	Opportunities	Threats
		<ul style="list-style-type: none"> <li>➤ No collaborative effort by industry players and government departments.</li> <li>➤ Failure to keep up with marketing trends.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Diversification in terms of linkages with other products/neighbouring destinations.</li> </ul>	
<p><b>Destination Management</b></p> 	<ul style="list-style-type: none"> <li>➤ Strong agriculture, mining tourism, and government services sectors.</li> <li>➤ Intra- and inter-regional connectivity.</li> </ul>	<ul style="list-style-type: none"> <li>➤ No formal support from local authorities.</li> <li>➤ Lack of maintenance on existing tourism offerings.</li> <li>➤ Infrastructure is a problem, poor electricity and water supply, especially to rural areas.</li> <li>➤ Lack of effective institutional capacity.</li> <li>➤ There is an absence in measuring tourism's contribution to the economy.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Create awareness and incentivise businesses and community members to participate in tourism initiatives.</li> <li>➤ Develop forums that allow stakeholders to convene and address challenges and opportunities.</li> <li>➤ Ensure that tourist facilities are clean and safe.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Lack of sustainable financial support.</li> <li>➤ Ageing Infrastructure.</li> <li>➤ Crime.</li> </ul>
<p><b>Product Development</b></p>	<ul style="list-style-type: none"> <li>➤ The structure of the FS tourism economy encompasses an array of tourism enterprises and offers a host of</li> </ul>	<ul style="list-style-type: none"> <li>➤ The lack of coordination between key players in the tourism sector.</li> <li>➤ High prices for product development.</li> </ul>	<ul style="list-style-type: none"> <li>➤ The Free State will have to develop products that entice tourists from other regions to visit the province.</li> <li>➤ Job creation across different levels.</li> <li>➤ Transit-tourism opportunities.</li> </ul>	<ul style="list-style-type: none"> <li>➤ The Free State has the lowest per capita spend in the province of all regions in the country.</li> </ul>

Thrusts	Strengths	Weaknesses	Opportunities	Threats
	<p>entrepreneurship opportunities.</p> <ul style="list-style-type: none"> <li>➤ Cultural diversity.</li> <li>➤ Favourable climate.</li> <li>➤ Value for money.</li> <li>➤ A variety of attractions.</li> </ul>	<p>and ignorance regarding the potential of the industry.</p> <ul style="list-style-type: none"> <li>➤ Lack of sufficient product packaging to target the right markets.</li> <li>➤ Lack of transformation in the sector.</li> <li>➤ Lack of sufficient funding for activities and operational costs.</li> <li>➤ Lack of 'place-making', i.e., marketplace.</li> </ul>		
<p>Transformation</p> 	<ul style="list-style-type: none"> <li>➤ Many of the support mechanisms are focused on small, medium and micro enterprises and black South African entrepreneurs.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Insufficient funding for the backlog in transformation programmes, provision of equipment and skills development.</li> <li>➤ The Free State does not have sufficient institutional support structures exclusively aimed at the tourism sector.</li> <li>➤ Shortage of skills development.</li> <li>➤ Shortage of skilled personnel in the sector.</li> </ul>	<ul style="list-style-type: none"> <li>➤ The South African government aims to transform the tourism system to include as many historically disadvantaged individuals as possible through a range of institutional support structures.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Lack of mass participation in transformation programmes.</li> <li>➤ Inadequate expertise/skills.</li> <li>➤ Difficult to source additional funding for transformation programme provision.</li> </ul>

## SECTION 4: STRATEGIC FRAMEWORK

### 4.1 Vision

The vision statement provides a concrete way for stakeholders, especially employees, to understand the meaning and purpose of the current and future roles of tourism, as well as tourism's impact on the province's economic growth and the wellbeing of the people. The vision must provide guidance and clarity, inform the direction of tourism development and set priorities while challenging the sector to grow.

To develop the vision, attention should be given to the tourism products that the province has to offer, the mechanisms that will be put into motion through tourism, and the specific markets that are targeted. The vision should also align with the tourism objectives that the province seeks to achieve. For the Free State, the tourist markets are international (Lesotho, Botswana, USA, Germany, Netherlands), domestic (FS, GT and EC) and emerging (Asian). The drawcards of the province include its natural/scenic beauty (wilderness and wildlife), its heritage and cultural offerings (cultural villages; monuments—the National Women's Memorial, Vegkop Battlefield Monument, Winburg Voortrekker Monument; museums—Anglo-Boer War Museum, the National Museum, Queen's Fort Military Museum, etc.) as well as diverse adventure experiences.

The objectives that strongly support economic growth, best practice and transformation within the sector are also reflected in the vision statement. To diversify product offerings, the development of niche products and packages will be prioritised to provide more options for the domestic market that will be targeted. The FS also aims to improve its ranking when it comes to the number of tourist arrivals for both the domestic and international markets in comparison with the other provinces. The FS is currently in 5<sup>th</sup> position for both categories and strives to be in 3<sup>rd</sup> position for domestic arrivals, and 4<sup>th</sup> position for international arrivals by 2025. Merging these important aspects to represent and guide the tourism strategy, the vision statement for the Free State Tourism Strategy is:

**“To establish a leading quality destination through product diversification and promotion and sustainable tourism development which will significantly contribute to socio-economic growth and strengthen the competitiveness of the province as a tourism destination”**



## 4.2 Objectives

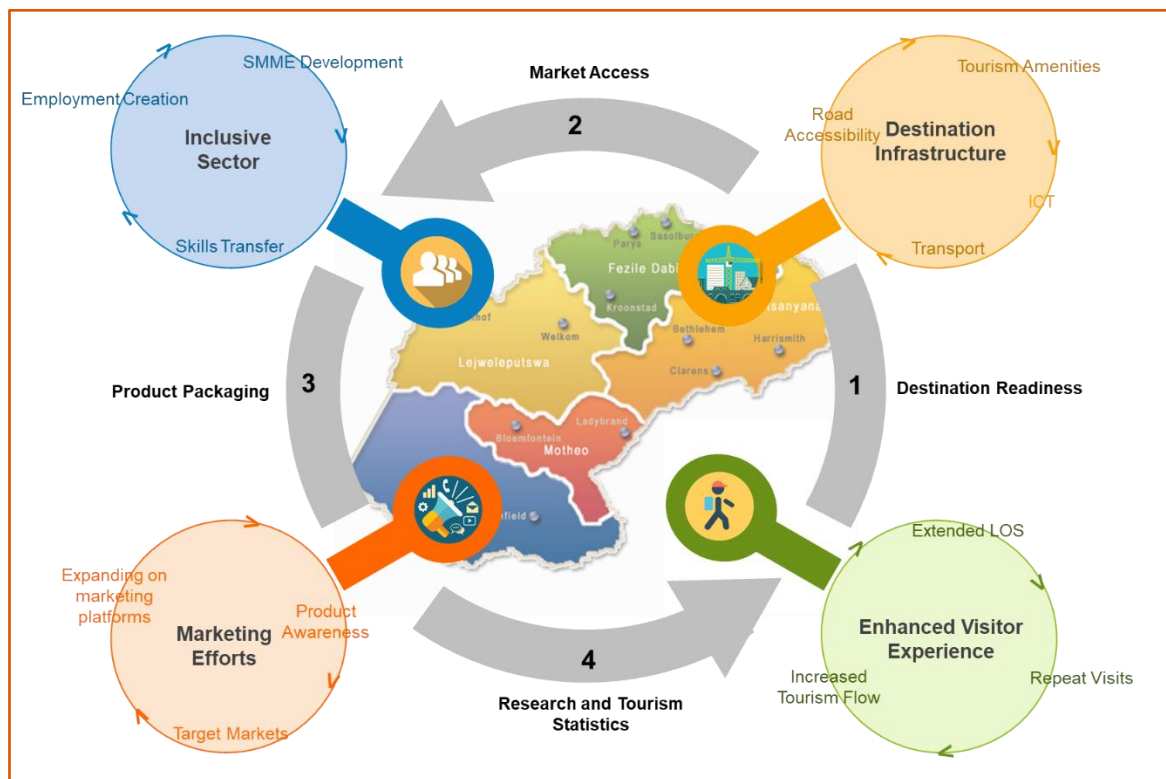
The following objectives guide the development and success of the tourism strategy:

- To grow the tourism sector and transform the province into a popular repeat-visit destination for both the international and domestic markets
- To increase tourism’s contribution to the economy
- To lengthen the stay of tourists during both high and off-peak seasons
- To create and maintain a sustainable provincial tourism sector
- To identify new approaches and interventions to strengthen and further develop an inclusive tourism sector.

## 4.3 Strategic Direction

The strategy is designed to align with the NTSS’s strategic pillars which indicate the intention to better utilise the country’s unique destination assets—nature, culture, heritage—to grow the tourism economy as well as the excellent services and products that must underpin the visitor experience.

Figure 43: Strategic Direction



All of these strategic elements should function together to create an enabling environment for tourism growth to take place. Each focus area plays an important role in the destination’s tourism value chain,




and they all impact one another. The success of the tourism sector depends on effective operations within each development area.

Domestic tourism is an essential segment of the tourism economy and provides a foundation for sustainable tourism growth and development. Therefore, the five pillars of the NTSS encompass key elements that will drive the development and growth of this market which should form the backbone of the sector during the pandemic.

#### 4.4 Key Barriers to Tourism Development

The following key barriers to tourism development in the Free State were identified.

Table 3: Barriers to tourism development

<p><b>Lack of Tourism Funding</b></p> 	<p>The main challenge is the lack of funding to ensure efficient marketing and product development in the province. Budgets on a municipal level are either non-existent or inadequate. The largest portion of these budgets goes to the agency for marketing purposes and what is left mainly goes to compensation for employees.</p>
<p><b>Lack of Market Data</b></p> 	<p>Data management is critical for tourism planning, development and marketing. The current lack of data forms a barrier to marketing efforts that could be more target market-focused and communicate to their specific preferences. Primary data collection should be implemented, and the results should be made available to all sector stakeholders to inform and guide marketing and planning approaches.</p>
<p><b>Lack of Safety and Security</b></p> 	<p>The safety and security of visitors, residents and tourism product owners are of utmost importance. When picking a travel destination, tourists are highly cautious as they are aware of the risks they are taking when travelling to a foreign country. Being labelled as a destination that is not safe and secure will most surely affect the number of arrivals to that destination.</p>

**Business Non-Compliance**



Many operating tourism businesses are not compliant with business registrations, grading, and adhering to COVID-19 regulations. This affects the quality of products and services in the tourism sector and makes it difficult to monitor and regulate the sector. A zero-tolerance approach needs to be implemented towards those who are non-compliant.

**Lack of Stakeholder Collaboration**



For tourism in the FS to grow and become more sustainable (and to diversify on product offerings), tourism stakeholders must work together through collaborative and partnership initiatives. Challenges/opportunities identified in this regard include:


- There are gaps in marketing coordination among stakeholders. Product owners should work with the FSGLTA as they are the marketing wing of the FS.
- There is no collaboration between the public and private sector.
- There is a lack of dedicated leadership within the tourism sector. The sector needs people who are passionate about their work so that the many challenges which are faced can be tackled effectively and timeously.
- No tourism organisation exists for product owners.
- Opportunities for collaborations exist as the FS is at the heart of the country. For this reason, cross-provincial opportunities should be investigated.
- Tourism is driven by the private sector; however, there needs to be a collaboration with the public sector, too.
- Stakeholders are working in silos; this type of approach is not supporting or growing the tourism sector at large.





### 4.5 Key Success Factors for Tourism Development

The following key success factors should be considered and prioritised to develop an enabling environment in which tourism can thrive.

Table 4: Key success factors for tourism development

<p><b>SMME Development and Support</b></p> 	<p>SMMEs are seen as the backbone of the tourism sector in South Africa. SMMEs create a more diverse economic structure, adapting to the ever-changing market environment, stimulating competition, exploiting cultural value and creativity, and facilitating innovation and increased economic activity. The majority of tourism businesses in the Free State's tourism sector are SMMEs; it is, therefore, important to encourage entrepreneurial activities through SMME development to expand unique offerings within the Free State tourism sector while creating jobs and opportunities for Previously Disadvantaged Individuals.</p>
<p><b>Rural Area Tourism Development</b></p> 	<p>Rural tourism aims to improve the living standards of communities living in non-urban areas. Due to the diversity of cultures and countryside found in the Free State Province, rural tourism development must be considered as part of the sector to ensure hospitable host communities and maximum benefits through tourism activities. It is important to develop rural tourism in a way that preserves the main characteristics of rural areas while allowing tourists to travel safely and conveniently, creating quality tourism experiences. Rural tourism is important as it creates personal, authentic experiences for tourists while benefiting the sector's growth and the communities' livelihoods.</p>
<p><b>Strategic Marketing and Exposure</b></p>	<p>It is important to create and implement strategic marketing methods within the Free State Province that adapt to modern-day trends but accommodate those searching for more conservative ways to travel. For instance, digital marketing using websites, mobile applications and social media should be developed in a convenient and user-friendly way while roadmaps, brochures and</p>

	<p>marketing books remain available at tourism information centres. This will ensure all types of tourists are accommodated and reached through marketing methods.</p>
<p><b>Target High-Potential Tourism Markets</b></p> 	<p>On a domestic level, the Gauteng Province is the ideal target market for the Free State tourism sector. It is important due to the travelling patterns and proximity of the province to create a demand amongst Gauteng residents to visit the Free State Province. Gauteng residents aim to travel to places away from their busy city lives and therefore pass through the Free State province to reach coastal areas for tourism purposes. The province should create a demand under these travellers to regard the province as part of their journey as a preferred destination, rather than an en-route destination. Fortunately, those from Gauteng province take the most domestic trips in South Africa, which will be beneficial to the Free State's tourism sector (if this market can be captured).</p>
<p><b>Grading of Accommodations</b></p> 	<p>The current shortage of graded accommodation establishments affects the quality of accommodation services offered to visitors. Due to the existing requirements and processes that accompany the grading of accommodation, many local guest houses, hotels and other accommodation establishments avoid the process and operate on a private level. The grading of accommodation is only valid for one year; thus, the process must be repeated annually along with charges. Consequently, not all accommodation establishments are graded, which means the quality of tourism products and services cannot be guaranteed. It is recommended that more awareness programmes be launched to inform accommodation establishments about the benefits and opportunities that come with being graded.</p>
<p><b>Upgrading of Existing Attractions</b></p>	<p>The aesthetics of a destination, as well as fully functioning facilities, play an important role in attracting tourists. For this reason, the maintenance and renovation of existing attractions and tourism</p>



	<p>offerings will be beneficial to the area. This may include the renovation of public facilities (expanding establishments by adding a conference facility and/or more rooms, making it more accessible or adding more services), the establishment of a tourism information centre, refurbishments within existing attractions and facilities, and the maintenance of general infrastructure in the province.</p>
<p><b>Tourism Awareness Creation</b></p> 	<p>The lack of knowledge of the impact of tourism may lead to a lack of buy-in and support from stakeholders and community members. It will be beneficial to the province’s tourism sector to conduct tourism awareness campaigns/tours in the different districts to educate both the public and private sectors on what tourism means for the destination and for them to understand the impact and benefit of hosting visitors.</p>
<p><b>Stakeholder Coordination</b></p> 	<p>Adequate communication channels and other interactive platforms provide role-players with the opportunity to deliberate on tourism matters and bring to light the challenges experienced in the tourism sector. These communication channels also enable a ‘one vision’ approach that will drive and guide tourism moving forward. Stakeholders and government alike can capitalise on this vision to obtain proper funding for tourism initiatives and solve challenges.</p>

## SECTION 5: DEVELOPMENT PILLARS

### 5.1 Accessibility

This pillar specifically focuses on addressing impediments that limit the ability of potential international and domestic tourists to travel to and within the province. Even with the best branding, marketing and products, the growth of the sector will be impacted if restrictive conditions are maintained in the regulatory environment. With improved ease of access, tourist numbers will increase<sup>11</sup>.

#### 5.1.1 Objectives



<sup>11</sup> National Tourism Sector Strategy 2016-2026.

### 5.1.2 Key Considerations and Interventions

The following should be considered when addressing accessibility.

	Key Consideration	Intervention
Universal Accessibility	Tourism establishments and tourism planning approaches should be inclusive of people with disabilities. This means easing access for the physically disabled, seniors, those with visual impairments, intellectual disabilities, parents with pushchairs, and people with temporary physical impairments. Mobility and ease of access will automatically contribute to the general ‘tourist experience’.	<ul style="list-style-type: none"> <li>✓ Provide information about the accessibility of accommodation facilities to all categories of tourists with disabilities.</li> <li>✓ Ensure universal design principles are adopted in the design and operation of accommodation facilities.</li> <li>✓ Ensure that staff members are trained to inform and advise people with physical disabilities about accessible services and attractions.</li> </ul>
Access to Product Information	This entails the ability to research relevant tourism offerings and make bookings on an online platform. If product owners are not advertising themselves in this way, they will not be noticed by potential visitors to the province. In terms of actual tourism offices/centres at the destination, the question is whether VICs are still relevant in this technological age.	<ul style="list-style-type: none"> <li>✓ Provide relevant and reliable product information on marketing agency websites and business websites.</li> <li>✓ Continuously update the province’s tourism product database to ensure that information is current.</li> <li>✓ Provide marketing training/support to businesses on how to effectively promote their offerings.</li> </ul>
Signage	Signage plays a crucial role in tourism and has many functions—it attracts visitors, provides direction and wayfinding, informs and educates. The province, however, is battling a signage backlog. This impacts visibility, awareness and marketing of tourism products. The lack of signage makes the roads less accessible to tourists and also makes it impossible to convince self-driving tourists to make impromptu visits to sites/products as they pass through the province.	<ul style="list-style-type: none"> <li>✓ Conduct tourism signage audits/mapping to identify and address signage needs and challenges.</li> <li>✓ Review existing signage and improve where necessary, e.g., electronic tourism boards.</li> <li>✓ Ensure that there is effective directional signage en route and within each region.</li> <li>✓ Provide facilitation with these applications and provide a support process to help with the signage across the FS.</li> </ul>

Key Consideration		Intervention
Transport	Tourists visiting the province usually opt for the self-drive option when it comes to choosing a mode of transport. Reasons for this include the independence afforded by not having to rely on public transport and also safety. That said, the province should still provide efficient and safe modes of public transport to tourists who prefer to make use of public transport. The province needs to improve its transport sector to be more integrated and tourist-friendly.	<ul style="list-style-type: none"> <li>✓ Develop integrated transport solutions for the tourism sector.</li> <li>✓ Engage with private and public transport companies to create linkages between attractions and activities.</li> <li>✓ Develop a park-and-ride concept on the outskirts of the major towns.</li> </ul>
Roads	Road infrastructure in the province, as well as some public tourist places/amenities that are on the main tourism routes, are in dire need of attention. Inaccessible accommodation and attraction establishments represent further obstacles in the physical environment and affect tourism performance. There are also challenges surrounding communication from the government’s side on these matters/resolutions.	<ul style="list-style-type: none"> <li>✓ Identify and prioritise the main tourist routes that need repair/maintenance within each local municipality.</li> <li>✓ Routine maintenance on roads is vital to provide access and safe driving conditions to tourists.</li> <li>✓ Ensure the cleanliness of public roads/streets.</li> <li>✓ The tourism marketing authority, tourism department and local municipalities should communicate on this issue and produce solutions as products are losing business because of this challenge.</li> <li>✓ Current tourism routes must link to major roads. Link routes with the N1 and/or other important access roads/highways.</li> </ul>
ICT	1. The role of ICT in the tourism sector cannot be underestimated; it is a crucial driving force in the current information-driven society. It has provided new tools and enabled new distribution channels, thereby creating a new business environment. ICT tools have facilitated business transaction in the industry through networking with trading partners, distributing product services and providing information to	<ul style="list-style-type: none"> <li>✓ Create and sustain an effective ICT environment.</li> <li>✓ Maintain and update websites.</li> <li>✓ ICT training for all levels of workers.</li> <li>✓ Establish electronic linkages between all related sectors.</li> </ul>

Key Consideration		Intervention
	<p>consumers across the globe. Consumers are also going online to obtain information and plan their trip and travel<sup>12</sup>.</p> <p>2. The use of QR codes can be implemented to enhance both accessibility and marketing. The use of QR codes will be dependent on a strong and reliable Free State tourism website.</p> <p>3. The roll-out of internet/fibre/Wi-Fi is vital to the growth of the tourism sector.</p>	<ul style="list-style-type: none"> <li>✓ QR codes that link to a Free State tourism website, app, etc.</li> <li>✓ Highlighting a fun tourist attraction within that route or area.</li> <li>✓ Strategically placed at places of rest in partnership with the major filling stations, leading in and out.</li> <li>✓ Identify priority areas/tourism hubs.</li> <li>✓ Improve overall network services throughout the province.</li> </ul>
Infrastructure	<p>Decaying infrastructure poses a great threat to tourism infrastructure. Many tourism sites (museums, monuments, etc.), buildings and tourism facilities are neglected and in need of upgrade/revitalisation. It is also important to note that there is a link between market access and infrastructure. The provision of adequate infrastructure provides increased opportunities for product diversification and employment.</p>	<ul style="list-style-type: none"> <li>✓ Ensure that tourism sites are appealing and attractive.</li> <li>✓ Conduct product audits on tourism products to identify infrastructure needs.</li> <li>✓ Ensure that tourism amenities and general tourism products are safe for tourists.</li> </ul>

<sup>12</sup> Shanker, D. ICT and Tourism: Challenges and Opportunities. *Humanities and Social Sciences*, Indian Institute of Technology, Guwahati-781039.

## 5.2 Marketing

Effective marketing requires winning campaigns to attract tourists from prioritised international and domestic markets and segments, as well as enhanced brand management. The involvement of and improved collaboration between stakeholders is critical, necessitating improvements in coordination between the local, provincial and national bodies responsible for tourism marketing, as well as with natural, cultural and heritage institutions<sup>13</sup>.

### 5.2.1 Objectives




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<sup>13</sup> National Tourism Sector Strategy 2016-2026.



### 5.2.2 Key Considerations and Interventions

The following should be considered when addressing marketing.

Key Consideration		Intervention
<b>Marketing Approach</b>	<b>Destination Marketing to Domestic Market</b>	<ul style="list-style-type: none"> <li>✓ Establish travel confidence by promoting the Free State as a safe destination that adheres to COVID-19 protocols/regulations.</li> <li>✓ Create and package affordable offerings for this market—value-for-money products, family and recreation, etc.</li> <li>✓ Tourism offerings should include, for example, private dining experiences, time slots for the exclusive use of amenities, upgrades to room service and more frequent housekeeping.</li> <li>✓ Target the weekend-family market.</li> <li>✓ Identify the top ten attractions in each route that are closer to the target market.</li> <li>✓ Strengthen the online marketing approach and social media presence for both the FS in general and its DMs.</li> <li>✓ Use cost-effective marketing platforms, such as Google Maps, Facebook and YouTube.</li> </ul>

Key Consideration		Intervention
<p><b>Reassessing and Realigning the FS Brand</b></p>	<p>A destination brand is an experimental concept which sticks in minds as an image that occurs as a result of a comprehensive brand strategy and includes all experiences of destination visitors concerning the destination and emerges in consequence of the reflection of demands and requirements of the target audience and experiences that they have there. A destination brand is a symbolic structure consisting of recollective memories specific to the destination, features making a destination attractive and a connotation of qualified aspects.</p> <p>The Free State needs to set itself apart from other provinces and create awareness of those products and experiences that make it a unique destination. Fragmented marketing approaches, programmes and strategies are not contributing toward building a strong and recognisable destination brand.</p>	<ul style="list-style-type: none"> <li>✓ Develop a Provincial Tourism Marketing Strategy for the Free State and benchmark it with destination marketing strategies such as those of the WC and KZN.</li> <li>✓ Make use of more innovative distribution channels— promotional videos, host competitions/challenges and create discussion platforms on social media.</li> <li>✓ Develop a branding message that is common to all stakeholders and how it links to promoting tourism.</li> <li>✓ Ensure that all product websites/social media are active and engaging with followers.</li> <li>✓ Promoting Free State in the different neighbouring provinces.</li> <li>✓ Promoting Free State on national platforms; TV, DSTv and radio stations.</li> <li>✓ Marketing efforts should consider the unique tourism products that set the FS apart from the other provinces.</li> <li>✓ Develop a unique #hashtag for marketing purposes to engage with followers and promote more on social media.</li> <li>✓ Promotion can take place through roadshows and social media (collaboration with “influencers”).</li> <li>✓ Facilitate working together with the private sector.</li> </ul>
	<p>The length of stay is one of the key elements in a tourist’s decision-making process and is of great importance for the tourism destination. It is important to increase LOS in the district. Many tourists transit through the district; these markets should be targeted.</p>	<ul style="list-style-type: none"> <li>✓ Attractive and affordable product packages can entice people to stay longer and explore more of the region.</li> <li>✓ Develop weekend/mid-week specials to entice visitors to stay longer.</li> <li>✓ Target business travellers by packaging pre-and post-meeting/conference itineraries.</li> </ul>

Key Consideration		Intervention
<b>Product Marketing Revitalisation</b>	In the current uncertain business and economic environment, it is not always possible to develop new tourism products. Many challenges are found with existing products that need attention. This can relate to the physical condition of the product/site or how it is being promoted. Heritage and cultural products need to be revitalised and uplifted through innovative marketing and promotion.	<ul style="list-style-type: none"> <li>✓ Implement a stronger, more focused marketing approach to uplift the heritage and cultural offerings in the province.</li> <li>✓ Develop new and innovative marketing content on existing products (e.g., virtual tours, video content, etc.).</li> <li>✓ Collaborate with stakeholders on tourism development in niche areas and promote these offerings to create a stronger awareness thereof.</li> <li>✓ Engage with film production houses to use the FS for filming purposes—entice producers to film television shows/programmes in the province.</li> </ul>
	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 competitiveness <sup>14</sup> .	<ul style="list-style-type: none"> <li>✓ Boosting digitalisation and the use of online marketing and distribution tools within the industry to meet new trends and consumer expectations.</li> <li>✓ Investigate the viability of app development for the province and the individual districts.</li> <li>✓ Provide support to SMMEs on internal operations, i.e., for sales and marketing.</li> <li>✓ Digital systems to be used for big data collection and management.</li> <li>✓ Customise visitor experiences through digitalisation.</li> </ul>
<b>Institutional</b>	Several challenges are experienced when it comes to institutional arrangements, the biggest being the lack of marketing organisations on a district and local level. Tourism forums are also not operating,	<ul style="list-style-type: none"> <li>✓ Investigate the potential of establishing more tourism marketing agencies/associations throughout the</li> </ul>

<sup>14</sup> Dredge et al. 2018. Digitalisation in Tourism: In-depth Analysis of Challenges and Opportunities.

	Key Consideration	Intervention
	<p>thereby failing to provide an adequate platform for tourism stakeholders to engage and address sector challenges and opportunities. Marketing on a provincial level is perceived as well-performing, however, the same sentiment is not shared when it comes to the marketing of the individual districts.</p>	<p>province to ensure that targeted marketing of each region or district is taking place.</p> <ul style="list-style-type: none"> <li>✓ Establish tourism forums to allow communication between the public and private sector.</li> </ul>
<p><b>MICE/Events/Shopping</b></p>	<p>The MICE industry is an important sector to attract foreign visitors and investment. Pre-COVID-19 tourism saw growth as more people started to travel for business and to attend conferences and other events in the province. The upkeep and maintenance of these venues are crucial for delivering products and services of the highest quality.</p> <p>These venues should strive to contribute to the positioning of the province as a premium business and lifestyle destination. One major rebound segment is shopping tourism. This includes tourists shopping for personal items and those shopping for business; it is a major motivator of travel from our neighbouring countries, i.e., those coming to the Free State from Lesotho to shop. The Free State has many events to capitalise on in these times to support the tourism sector, as festival/event-goers spend money in the province through the use of accommodation and other tourism products in addition to money spent at the event itself.</p>	<ul style="list-style-type: none"> <li>✓ Hosting of hybrid events—combining the best of in-person and virtual solutions while maintaining the destination’s relevance as a MICE destination.</li> <li>✓ Ongoing COVID-19 communication is vital.</li> <li>✓ 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.</li> <li>✓ Create incentive packages that are more widespread across the provinces to expand business tourists’ exposure to what the province has to offer.</li> <li>✓ Revise the province’s events calendar to identify events or other potential opportunities in this regard.</li> <li>✓ Coordinate the events calendar to address challenges related to seasonality and the geographical spread of tourists in the province.</li> <li>✓ Revitalise the Mangaung Rose Festival and design an aggressive marketing strategy for both domestic and international tourists.</li> </ul>
<p><b>Collaboration</b></p>	<p>Collaboration is crucial for tourism growth and to diversify the tourism offerings in the province. Collaboration with neighbouring destinations presents various product packaging opportunities and</p>	<ul style="list-style-type: none"> <li>✓ Collaborate with other subsectors of the economy.</li> </ul>

	Key Consideration	Intervention
	<p>strengthens the notion that tourism essentially has no borders. On a district and local level, businesses tend to operate in silos with no cohesion when it comes to marketing the destination/region.</p>	<ul style="list-style-type: none"> <li>✓ Develop themed offerings, e.g., the Free State shares a border with KZN (Drakensberg) which can be linked with the Golden Gate, Basotho Cultural Village and Sterkfontein dam to create a themed product package.</li> <li>✓ Collaborate with neighbouring regions such as Lesotho as well as provincial counterparts.</li> </ul>

### 5.3 Destination Management

Destination management relates to the practices, activities and relationships that help organise the tourism system. These typically include planning; the development of standards, guidelines, and regulations; research; the definition of roles and responsibilities; and the development of structures and processes that organise information flows and relationships between the various stakeholders to optimise the destination’s performance. Effective and proactive destination management is critical for competitiveness<sup>15</sup>.

#### 5.3.1 Objectives




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<sup>15</sup> National Tourism Sector Strategy 2016-2026.

### 5.3.2 Key Considerations and Interventions

The following should be considered when addressing destination management.

	Key Considerations	Interventions
<b>Destination Readiness</b>	<p>The tourism sector is one of the sectors that were hit the hardest by the COVID-19 pandemic and will be one of the last to recover. The Free State needs to launch initiatives that implement and address elevated standards of health and safety in the destination, to ensure that they are ready to safely welcome local and international visitors. It is also important to establish travel confidence in tourists and assure them that they will be safe and will be dealt with per COVID-19 health and safety protocols when visiting the province and using tourism products.</p>	<ul style="list-style-type: none"> <li>✓ Ensure that information on travel restrictions and their lifting is accessible, consistent and reliable. This information should be shared with the sector and consumers through all available communication channels.</li> <li>✓ Create special programmes to promote employment and skills development, especially digital skills, for tourism, and particularly for the unemployed.</li> <li>✓ Communicate with transparency and support destinations and companies to restore confidence among consumers to restart travel as soon as it is permitted.</li> <li>✓ Promote domestic tourism to start rebuilding provincial economies.</li> <li>✓ Incentivise development in products, market segments and marketing activities that contribute to a more responsible and sustainable travel and tourism sector.</li> </ul>
<b>Tour Guiding</b>	<p>Tour guiding is a critical component of the tourism value chain. Tour guides play an essential role in ensuring repeat tourist visitation to South Africa by creating a positive image of our country. Illegal guiding is a big problem in the province, often stemming from a lack of awareness, where these guides are not even aware that what they are doing is illegal. Tour guides must apply for badges, complete first aid training and prove that they are qualified to lead groups. Illegal operators fail to go through all these processes and are, as a result, likely to spread false information. The province can also benefit from tour guides through tourist insights and information that they gather from conducting tours and interacting with the tourists.</p>	<ul style="list-style-type: none"> <li>✓ 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.</li> <li>✓ 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.</li> <li>✓ More tour guides need to be trained so that they can form part of product packaging.</li> <li>✓ Tour guiding services need to be formalised, e.g., by establishing a central location where guides can meet up with tourists.</li> </ul>

Key Considerations		Interventions
		<ul style="list-style-type: none"> <li>✓ Relevant government departments to facilitate training and registering of local guides.</li> <li>✓ Support is needed to facilitate communication between guides and tourists.</li> <li>✓ Train tour guides in foreign languages.</li> <li>✓ Conduct a screening exercise on tour guides in the province to monitor illegal guiding activities.</li> <li>✓ Tour guides need relief support during the pandemic.</li> </ul>
<b>Service Delivery</b>	<p>Effective service delivery (in supply and quality) contributes towards creating an enabling environment for tourism to operate in. Unreliable service delivery or the lack thereof hinders development of any kind. Providing tourists access to basic services at a destination creates an overall enjoyable visitor experience. Challenges include keeping the tourism attractions clean within the municipalities, as well as maintaining the roads between towns. Services such as waste removal and maintaining public areas, streets and parks provide a clean and aesthetically pleasing destination which is vital for tourism development.</p>	<ul style="list-style-type: none"> <li>✓ Enable effective service delivery within all local and district municipalities, especially in areas where the tourist flow is stronger, e.g., tourism hotspots/hubs.</li> <li>✓ Revise and publish/provide access to municipality by-laws that address these matters.</li> <li>✓ Ensure that the relevant tourism infrastructure is available and of good quality.</li> <li>✓ Enhance the aesthetic appeal of the destination. Aesthetics influence the quality of photos that can be taken on a visit. Aesthetics also create an opportunity for free marketing as visitors' pictures are shared on social media.</li> </ul>
<b>Institutional Arrangements</b>	<p>The tourism sector functions on a local level and needs to abide by local authorities' regulations. Hence, it is vital that the institutional framework feeds into and supports the goals of each government sphere and follows a structured approach to regulating and facilitating the tourism sector. Institutions play an important part in the development of a robust foundation, which the tourism sector and other industries need to build on, and so help to regulate and support the effective growth and development of the sector on the national, provincial and regional levels.</p>	<ul style="list-style-type: none"> <li>✓ Restructure institutional frameworks to increase effective functioning within the tourism sector.</li> <li>✓ Establish effective communication channels, e.g., tourism forums and associations to guide and support tourism development.</li> <li>✓ Prioritise the alignment of municipality by-laws and districts, e.g., with specific regards to zoning.</li> <li>✓ Concerning tourism forums—it is recommended that the reasoning should be broad in terms of stakeholders that need to be identified and brought on board. Participation should not be limited to tourism stakeholders.</li> </ul>



Key Considerations		Interventions
	Communication is vital in this regard, and although the pandemic has affected the assembly of forums, for example, these engagements can take place amidst the current restriction (through compliance with COVID-19 protocols). The Free State also experiences red-tape challenges—in particular with marketing, investment, policy development and SMME development.	<p>Stakeholders such as the Department of Transport, COGTA, SANParks, etc. should also be invited to participate in forums.</p> <ul style="list-style-type: none"> <li>✓ Cohesion is required at the district level—a tourism organisation/association will be able to better coordinate the tourism sector.</li> <li>✓ Develop a provincial policy specifically for tourism.</li> <li>✓ IDPs need to align with common provincial tourism objectives. Currently, they are working in silos.</li> </ul>
<b>Grading</b>	To establish and promote tourist accommodation within the tourism sector, it is beneficial to have accommodations graded. Grading allows establishments to open their doors to more visitors as people prefer to make use of graded accommodation. The grading guarantees, to some extent, a quality product and experience for the visitor. The level of excellence is represented by the grading level of the establishment. Grading incorporates benefits relating to procurement, recruitment, legal advice, access to information, training and marketing. <sup>16</sup>	<ul style="list-style-type: none"> <li>✓ Promote meaningful benefits and cost structure to encourage grading.</li> <li>✓ Host awareness campaigns in the district on grading, the benefits associated with it and existing support programmes.</li> <li>✓ Provision of incentives may prompt establishments to pursue grading.</li> <li>✓ Promote and encourage business accountability and the significance thereof.</li> </ul>
<b>Safety and Security</b>	<p>In implementing tourism as a tool for sustainable development, safety and security improvements should include<sup>17</sup>:</p> <p><b>Better touristic information:</b> The authorities should be involved in opening some tourist information centres/offices and creating a</p>	<ul style="list-style-type: none"> <li>✓ The Safety Monitors Programme is active in the province; it provides tour guide training to learners (involving the recruitment of 100 learners which takes place on a local level).</li> <li>✓ Coordination on the local, provincial and national levels in terms of tourist safety is being implemented through an MOU between SAPS and NDT</li> </ul>

<sup>16</sup> Tourism Grading Council of South Africa website.

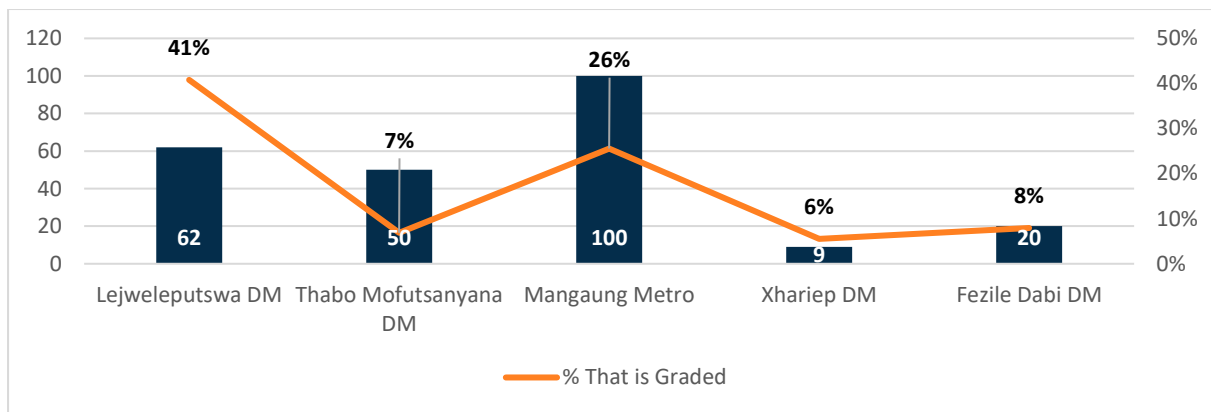
<sup>17</sup> Mawby et al. (2016:524). Addressing the Security Concerns of Locals and Visitors for the Sustainable Development of Tourist Destinations. *Sustainability* (8): 524.

Key Considerations	Interventions
<p>touristic orientation system to facilitate tourists’ access to different touristic objectives or institutions. This would include better use of the internet.</p> <p><b>Better safety advice:</b> Tourists’ awareness of the various risks should be raised, including information and recommendations concerning units of accommodation and catering, sanitary units, cab companies, means of transport, routes, etc. However, too great an emphasis on security information can induce a sense of fear among tourists.</p> <p><b>Better guidelines for stakeholders:</b> Provision of safety advice for stakeholders. A document of good practice was therefore seen as an invaluable aid to creating, at the local level, a safe and high-quality touristic environment, one in which tourists could coexist with residents.</p>	<p>where dedicated police officers are allocated for tourism-related crime/incidents. It is suggested that each LM identify a representative to work with SAPS officials to help resolve any issues of safety in that area.</p> <ul style="list-style-type: none"> <li>✓ Tourism police units/visible policing at tourism ‘hubs’, e.g., during strikes on roads, for general tourist safety.</li> <li>✓ All spheres of government should prioritise tourist safety in the destination.</li> <li>✓ Conduct safety perception surveys/scoping exercises with visitors.</li> </ul>

*Graded Establishments per District*

The quality of services delivered during tourist visits will influence the reputation of and repeat visits to accommodation establishments. It is therefore important to apply for grading at the Tourism Grading Council of South Africa (TGCSA) to ensure quality standard services are provided to tourists. The graph below depicts the number of graded accommodation establishments within each district in the Free State as well as the corresponding percentage share of the total accommodation establishments in that particular district.

Figure 44: Number and Percentage of Graded Accommodations per District



*Climate Change Impact on Tourism*

Climate changes will directly influence future tourism demand. Climate changes are caused by current and future events occurring due to global warming and entail erratic weather patterns and natural disasters. Such changes will have an impact on tourists’ purchasing trends while new means of transport will be used to limit the atmospheric damage caused by air traffic. Tourists who fear the impact of global warming on humanity would not want to contribute to the carbon footprint caused by air traffic.

Therefore, tourists might opt for journeys made by train, ship or coaches, especially with the modernisation and convenience of these modes of transport, efficient web accessibility and timetable suitability. Additionally, tourists will increasingly seek shorter trips within the same geographical region rather than partake in long trips. This will be a disadvantage for destinations focusing on increasing the length of stay. However, for the Free State Province, these demand changes will encourage an ultimate focus on the domestic tourism market (travelling via road transport) and the Lesotho international market (close to the Free State, where no air travel is required) to increase geographical spread within the province and take advantage of its central location in the country.

The following climate change adaptation issues have been identified in the *Free State Province Climate Change Response and Adaptation implementation Plan*.

Table 5: Climate Change Adaptation Issues

Adaptation Category	Vulnerability Details
<b>Social Vulnerability</b>	<ul style="list-style-type: none"> <li>➤ Lack of detailed research</li> <li>➤ Province has a dominant rural and peri-urban population that is vulnerable to climate change</li> </ul>
<b>Water</b>	<ul style="list-style-type: none"> <li>➤ Extensive agriculture (large-scale and small-scale farmers) at risk due to increasing temperature and less water availability</li> <li>➤ Potential loss of groundwater resources</li> <li>➤ Extreme drought events</li> </ul>
<b>Agriculture</b>	<ul style="list-style-type: none"> <li>➤ Food basket of South Africa</li> <li>➤ High evaporation and increased run-off will impact production</li> <li>➤ Decreased land availability</li> <li>➤ Potential increase in sorghum production</li> <li>➤ Increased chilling requirements for fruit</li> </ul>
<b>Biodiversity</b>	<ul style="list-style-type: none"> <li>➤ Loss of grasslands to savanna and forest vegetation</li> <li>➤ Potential loss of Nama-Karoo</li> <li>➤ Loss of biodiversity with drying wetlands and pans</li> </ul>
<b>Human Health</b>	<ul style="list-style-type: none"> <li>➤ Increases in heatwaves</li> <li>➤ Increased health impacts on vulnerable populations such as children and the elderly</li> </ul>
<b>Human Settlements</b>	<ul style="list-style-type: none"> <li>➤ Increased demand for cooling</li> <li>➤ Increased extreme rain events resulting in infrastructure damage</li> </ul>

Source: The Free State Province Climate Change Response and Adaptation Implementation Plan

Interventions for climate change include the following:

- ✓ Consolidate the climate change policy environment for the Free State into clear adaptation responses outlined in a provincial climate change strategy.
- ✓ Conduct provincial sector-specific research, specifically regarding social aspects of climate change and potential impacts on biodiversity.
- ✓ Mitigation measures to minimise impact include installing energy-saving lightbulbs or LED lights, practising recycling and minimising solid waste, purchasing energy-efficient appliances, training staff and employees on emissions-reduction actions, informing visitors on reducing their emissions, using solar or heat pumps, installing solar power cells, etc.

## 5.4 Product Development

The provision of experiences that are distinctive, environmentally friendly, authentic and deliver unique stories and outstanding services to tourists at all stages of their journey is key. This pillar includes enhancements to elements of the visitor experience across all visitor touchpoints. Areas that involve tourist-specific infrastructure to be developed, maintained and enhanced include<sup>18</sup>:

- World Heritage Sites and national, provincial and municipal parks
- General destination enhancements
- New tourism experiences

### 5.4.1 Objectives




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<sup>18</sup> National Tourism Sector Strategy 2016-2026.

### 5.4.2 Key Considerations and Interventions

The following should be considered when addressing product development.

Key Considerations		Interventions
<p><b>Public-Private Partnership (PPP)</b></p> <p>Under the right circumstances, public-private partnerships (PPPs) can allow governments to lead the development of tourism assets under government priorities and high environmental and social standards while harnessing the efficiency and creativity of the private sector. While a PPP is not the best tool for every scenario, the strategic use of these partnerships can contribute significantly to the development of a sustainable tourism programme and can be a part of a broader strategy to facilitate tourist access, enhance quality and efficiency, and improve the destination experience.<sup>19</sup> Typical tourism PPP products include accommodation, food, beverage and retail, activity-based tourism, and heritage and culture.</p>		<ul style="list-style-type: none"> <li>✓ Identify areas in the sector where PPPs can be implemented, e.g., the event industry, adventure tourism opportunities, management of municipal-owned reserves, etc.</li> <li>✓ Conduct pre-feasibility studies to determine the viability of such partnerships.</li> <li>✓ Ensure that supporting infrastructure is in place.</li> <li>✓ Ensure that suitable skills development programmes are made directly available to the private party to support its efforts.</li> </ul>
<p><b>Niche Development</b></p>	<p><b>Adventure Tourism</b></p> <p>Adventure tourism has become a quite popular form of tourism as many people regard being active as an important aspect of their lifestyle and, as such, have started to include physical activities in their travel itineraries. Accordingly, the unique natural scenery in the Free State provides the ideal environment for adventure tourism, offering activities such as hiking, mountain biking, horse riding, golf and canoeing, to name a few. Adventure opportunities should be expanded by making optimal use of mountainous areas in the province. Adventure tourism allows tourists to naturally</p>	<ul style="list-style-type: none"> <li>✓ Investigate the possibility to develop/expand on hiking and mountain biking routes.</li> <li>✓ Expand on this niche through offerings such as rock climbing, abseiling and paragliding.</li> <li>✓ Develop and host more adventure events/activities, e.g., warrior races/fun runs.</li> <li>✓ More advanced running events in the outdoors—it is a low-risk activity and will also attract the domestic market.</li> </ul>

<sup>19</sup> PPP Knowledge Lab.

Key Considerations		Interventions
	practice social distancing and still be in close contact with nature, which many travellers have lately been unable to benefit from.	
<b>Sport Tourism</b>	Sports tourism is one of the fastest-growing sectors in tourism. Sports events of various kinds and sizes attract tourists as participants or spectators, and destinations add local flavours to them to distinguish themselves and provide authentic local experiences <sup>20</sup> . Sporting events attract large numbers of tourists, be they athletes who compete in events, the families of such athletes, or casual sports enthusiasts. It can also lead to substantial increases in repeat visitation, tourism revenue, as well as a heightened sense of pride among the community members in the host city. The Free State has excellent sporting infrastructure and can host international sport tournaments.	<ul style="list-style-type: none"> <li>✓ Investigate viable areas/sites throughout the province that have the potential to host sporting events.</li> <li>✓ Conduct infrastructure upgrades where necessary to improve facilities for sports tourism.</li> <li>✓ Effectively market these events.</li> <li>✓ Engage with the sporting community to promote sports tourism in the province.</li> </ul>
<b>Culinary Tourism</b>	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.	<ul style="list-style-type: none"> <li>✓ Conduct a feasibility study on the development of a culinary route within the province.</li> <li>✓ Collaborate with CUT's Hospitality School and other culinary/chef schools in the province to develop unique and innovative experiences/packages.</li> </ul>
<b>Artisanal Drinks Route</b>	Package a route based on the products produced by artisans in the province, visiting various breweries across the province, e.g., Whistler's Rum. The potential route may include Phillippolis, Bloemfontein, Hennenman, Kroonstad, Parys, Memel and Clarens. These towns have artisanal drinks creators and can be paired with gastronomic tourism as well. Many of the establishments also provide food at their establishments.	<ul style="list-style-type: none"> <li>✓ Identify and engage with artisans on the products/offerings.</li> <li>✓ Develop the most suitable route to effectively include all the products.</li> <li>✓ Identify marketing channels to advertise the route.</li> </ul>

<sup>20</sup> United Nations World Tourism Organisation - Sports Tourism.

Key Considerations		Interventions
	<p><b>Dark Tourism Route: South African War</b></p> <p>The Free State played a pivotal role during the South African War (1899–1902) and thus has much to offer concerning dark tourism. The province was the scene of many battles and skirmishes during the South African War. Well-known battles in the province include those of Paardeberg, Sannaspos, Groenkop and Doornkraal. Dark tourism sites in the province range from battlefields, cemeteries and concentration camps to museums<sup>21</sup>.</p>	<ul style="list-style-type: none"> <li>✓ Dark tourism sites have already been identified in the province.</li> <li>✓ Adequate marketing, maintenance of sites, relevant signage, sufficient information provision, government involvement and greater awareness are needed to establish such an offering and ensure its success.</li> <li>✓ Develop guided tours for this route.</li> </ul>
	<p><b>Health and Wellness</b></p> <p>Travellers are seeking to manage, maintain and improve their health and go on wellness trips more than ever before, which may include health and wellness seminars led by popular health experts, custom fitness programmes, stress management activities, spa services and even itineraries dedicated to weight management and healthy living. Health tourism has major potential as one of the fastest-growing sub-sections of the tourism sector. It has been estimated that the health tourism industry is worth approximately <b>US\$60 billion</b>.<sup>22</sup> The natural beauty, open spaces and natural landscapes of the province afford it a variety of opportunities to expand on its tourism offerings by introducing more health and wellness-orientated activities.</p> <p>The adoption and promotion of <b>Special Economic Zones (SEZ)</b> in South Africa and the Free State, in particular, have the opportunity to enhance private investments in health care. In Dubai, for example, a “Healthcare</p>	<ul style="list-style-type: none"> <li>✓ Conduct a feasibility study on the availability of relevant product/sites within the province and the opportunity to package a themed offering based on these products.</li> </ul>

<sup>21</sup> Proos, E., & Hattingh, J. 2020. Dark tourism: Growth potential of niche tourism in the Free State Province, South Africa. *Development of Southern Africa*.

<sup>22</sup> Henama, U.S. (2014). Health tourism in South Africa: opportunities and possibilities. *African Journal of Hospitality, Tourism and Leisure*. Vol. 3 (1).



Key Considerations		Interventions
	<p>City<sup>23</sup> was developed for exclusive use by foreign medical/health tourists, developed as an SEZ.<sup>24</sup> The Free State Province has an SEZ in the Thabo Mofutsanyane region, the Maluti-A-Phofung SEZ Harrismith. <sup>25</sup></p>	
<b>Agri-Tourism</b>	<p>Agri-tourism in the Free State is earmarked as an opportunity for the area, with scenic hiking trails and natural locations identified as current strengths. The Free State has the following to offer: Unique foods, rich biodiversity, pristine locations, natural beauty, farm stays and experiences which are combined with a rich cultural heritage, educational experiences in crop and livestock farming, experiential/cultural/heritage tourism and environmental preservation which helps ensure that our natural heritage remains untampered<sup>26</sup>.</p>	<ul style="list-style-type: none"> <li>✓ Incorporate the farmers into an agri-tourism route, thereby opening doors to a potential tourism market that can help keep their farming sustainable.</li> <li>✓ Collaborate, share information and strengthen communities to facilitate a sustainable future which allows for additional income sources for farmers.</li> </ul>

<sup>23</sup> Alsharif et. al. (2010)

<sup>24</sup> Henama, U.S. (2014). Health tourism in South Africa: opportunities and possibilities. African Journal of Hospitality, Tourism and Leisure. Vol. 3 (1).

<sup>25</sup> DESTEA. (2019). Free State Provincial Economic Development Strategy Framework.

<sup>26</sup> Imla Gasteplaas Blog. 2020. Agri-Tourism in the Eastern Free State.

Key Considerations		Interventions	
	<b>Political History Focus</b>	<p>The Free State government confirmed that plans are at an advanced stage to have the iconic Waaihoek Wesleyan Church in Bloemfontein declared a World Heritage Site. It is where the South African Native National Congress, now the ANC, was formed in 1912. The historic church was declared a national heritage site in 2018. To be declared as a World Heritage Site is the highest level of prestige and protection a heritage site can receive. The church was restored almost a decade ago. There is currently little activity at the church, largely due to COVID-19 restrictions<sup>27</sup>. However, following its elevated status, it can be developed into a tourist attraction (development of a museum, etc.)</p>	<ul style="list-style-type: none"> <li>✓ Stronger emphasis should be placed on political/historical tourism, e.g., the formation of the ANC.</li> <li>✓ Develop themed packages/tours/routes.</li> </ul>
	<b>Edu Tourism</b>	<p>Edu-tourism is a type of tourism where education and learning are the main purposes of travel<sup>28</sup>. Educational tourism has also gained prominence as a tool for regional development around the world<sup>29</sup>. This type of tourism may further contribute to cultural integration and should be assessed as a force fighting xenophobia, ethnocentrism and cultural misunderstandings.</p>	<ul style="list-style-type: none"> <li>✓ Opportunities to be identified, e.g., school trips, language acquisition/cultural knowledge trips, scholarships, university programmes through the Department of Education, etc.</li> <li>✓ Engagement with relevant stakeholders is needed to develop opportunities within this niche area.</li> </ul>

<sup>27</sup> SABC News. January 2021. Plans to have ANC’s birthplace declared world heritage site at advanced stage.

<sup>28</sup> Alipour, H., Fatemi, H., and Malazizi, N. 2020. Is Edu-Tourism a Sustainable Option? A Case Study of Residents’ Perceptions. *Sustainability* 12:5937.

<sup>29</sup> Antiado, D.F.; Castillo, F.G.; Tawadrous, M.I. Educational Tourism in Dubai: The Global Higher Education Hub across Culture. In *Leadership, Innovation and Entrepreneurship as Driving Forces of the Global Economy*; Benlamri, R., Sparer, M., Eds.; Springer: Cham, Switzerland, 2017; pp. 543–551.

Key Considerations		Interventions
<b>Palaeontology</b>	<p>Palaeontologists discovered ten dinosaur nests—each containing several tightly clustered eggs—in a near-vertical cliff in Golden Gate Highlands National Park. Both the nests and the previously discovered embryo date back 190 million years. Evidence shows that the region was an early Jurassic nesting site used by a plant-eater called <i>Massospondylus carinatus</i>. The site predates other known dinosaur nesting grounds around the world by more than a hundred million years<sup>30</sup>.</p> <p>The new interpretation centre (IC) at Glen Reenen in Golden Gate Highlands National Park, which opened in November 2019, gives a taste of the bigger centre being built that will tell the story of the area’s dinosaur days. The full-scale dinosaur centre (currently delayed due to the COVID-19 lockdown) will feature a 3D-printed egg and a replica of a nest and offer a ‘dinosaur bush safari’<sup>31</sup>.</p>	<ul style="list-style-type: none"> <li>✓ This development will boost economic activity in the region and create more tourism spin-offs.</li> <li>✓ Identify opportunities for community participation and beneficiation through this initiative.</li> </ul>
<b>Revamp/Upgrade Existing Products</b>	<p>Tourism routes provide the perfect opportunity to display those aspects that make a destination unique (e.g., historic and cultural elements) but also to increase the spread of benefits to more than one product owner. Some municipal-owned properties are underutilised and need upgrading.</p>	<ul style="list-style-type: none"> <li>✓ Revitalise existing tourism routes relating to infrastructure, beautification and marketing.</li> <li>✓ Conduct an audit on municipal-owned entities that have tourism potential, and which can be developed as such.</li> <li>✓ Put stronger emphasis on heritage and cultural offerings in the province.</li> <li>✓ Monuments must feature constantly in marketing and should be kept in good condition.</li> </ul>

<sup>30</sup> Walters, C. Clarens News. Available at: <https://clarensnews.co.za/>

<sup>31</sup> Getaway. April 2020. Dinosaur centre coming to Golden Gate National Park. Available at: <https://www.getaway.co.za/>

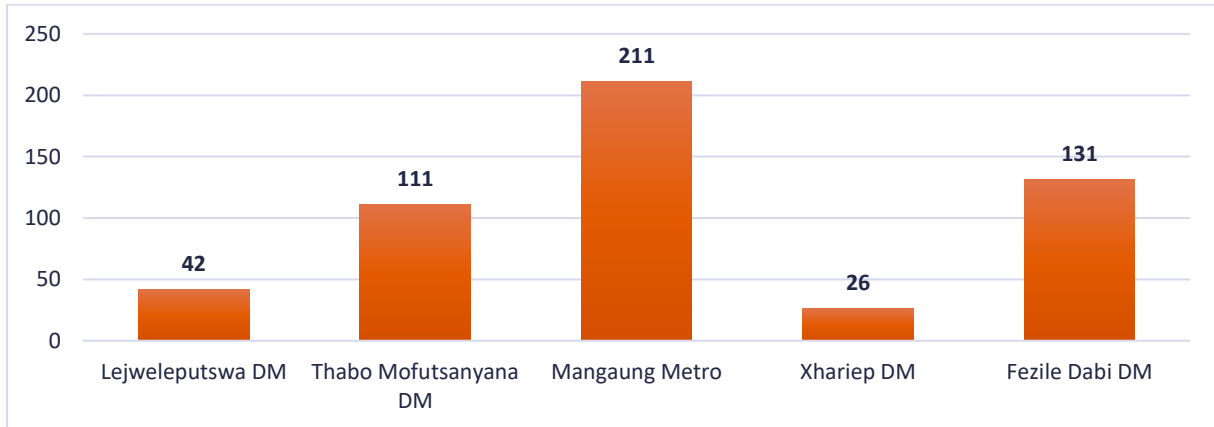
Key Considerations		Interventions
<b>Product Packaging/Themed Offerings</b>	<p>Effective product packaging entails knowledge on how to package tourism products, the different types of tourism packages, the types of tourists who purchase packages, how to develop strategic partnerships with other tourism service providers, and how to price these packages. Due to existing landscapes and products in the province, as well as its ideal location, many opportunities exist to diversify its tourism offerings through product packaging initiatives.</p> <p>Product packaging potential exists with the Drakensberg Cableway- which is envisioned to be a one-of-a-kind attraction providing tourists with the opportunity to ascend in comfort and safety close to the summit of Mount Amery where visitors will be able to enjoy (on most days) extensive vistas of the Drakensberg escarpment top and the valleys below. This will change the tourism landscape not only for KwaZulu-Natal but for its neighbours in the Free State and Lesotho as well.</p>	<ul style="list-style-type: none"> <li>✓ As the FS shares borders with six other provinces, investigate potential product linkages to cater to target markets in other provinces as well.</li> </ul>
<b>MICE/Events Industry</b>	<p>Many stakeholders feel that events are the ideal way to get more visitors to the province. They not only provide an economic injection to the province but also provide the necessary exposure and awareness to tourism products in the region. Events are a vehicle to attract more visitors—for events, people flock to the province for one or two days. Exposure in this regard is invaluable and supports marketing and investment opportunities. Events also promote the unique nature of a certain district when it comes to the natural landscape as well as the products it produces (e.g., cherries).</p>	<ul style="list-style-type: none"> <li>✓ Support events to stimulate economic growth and increase visitor numbers.</li> <li>✓ Extensively engage in comparative bidding/facilitation and coordination of MICE activities to take place in the province.</li> <li>✓ Look for cooperative advertising opportunities with business events partners.</li> <li>✓ Investigate and facilitate PPP processes in the events industry.</li> <li>✓ Review municipal by-laws and policies to provide better support to events and conferences.</li> </ul>

Key Considerations		Interventions
		<ul style="list-style-type: none"> <li>✓ The development of an ICC in the Free State will unlock opportunities to host more international events and conferences.</li> </ul>
<i>Kasi Tourism</i>	<p>South African townships are rich in history, culture, special cuisine and tourist attractions which often do not make it to the tourism value chain. Opportunities exist for the Free State to leverage this niche and develop tourist experiences. Other benefits of this form of tourism include the development and empowerment of <i>Kasi</i> tourism products, the promotion and creation of awareness of <i>Kasi</i>/township attractions, the creation of economic opportunities for township residents and local entrepreneurs, to close the gap of exclusion of township tourism enterprises from the mainstream and increase market access opportunities for township tourism enterprises.</p>	<ul style="list-style-type: none"> <li>✓ Create awareness of <i>Kasi</i> tourist attractions.</li> <li>✓ Create a platform to forge linkages as well as network opportunity between tourism establishments and the local community.</li> <li>✓ Target <i>After Tears</i> functions and other gatherings to be hosted at <i>Kasi</i> venues.</li> <li>✓ Target the VFR market.</li> <li>✓ Entrepreneurs are allowed to apply for/utilise incentives offerings provided by DESTEA.</li> <li>✓ Develop initiatives for youth and women involvement in <i>Kasi</i> tourism initiatives.</li> </ul>

*Free State MICE Venues*

As in many other countries, South Africa is greatly affected by the meetings and events industry, which has a tremendously powerful impact on the country's economy. Business visitors generally spend more than the usual leisure traveller—this money is most commonly spent at hotels, conference centres, restaurants, country clubs and convention centres<sup>32</sup>.

Figure 45: Number of MICE Venues/Services per District



South Africa’s largest hotel groups have several brands that cater to different markets. Protea Hotels has a few properties in the Free State: Protea Hotel Willow Lake (four-star), Protea Hotel Bloemfontein Central (three-star), Protea Hotel Montrose (Harrismith) and Protea Hotel Clarens. The four-star Southern Sun Bloemfontein, part of the Tsogo Sun group, has 147 rooms, and the Goldfields Casino in Welkom is another Tsogo Sun property. The City Lodge Bloemfontein has 151 rooms, and there is a Road Lodge at the airport. The Rantsoareng Group operates exclusively in the Free State and has three properties, the largest of which is the President Hotel in Bloemfontein. Sun International runs the Lesotho Sun and the Maseru Sun in neighbouring Lesotho. In Bloemfontein, the Windmill Casino and Entertainment Centre offers slot machines and gambling tables as well as the ability to host conferences for up to 250 delegates. The four-star Willow Lodge has 80 rooms.

The Province should investigate the potential development of an international conference centre (ICC) to attract both international and domestic business tourists, conferences and events to the province. This will result in increased opportunities for small businesses and employment and enhance the overall competitiveness of the province. Although COVID-19 is still negatively impacting the sector,

<sup>32</sup> Bizcommunity 2018- The importance of the MICE industry and business events in South Africa. Available at: <https://www.bizcommunity.com/Article/196/781/180736.html>

the province must start preparing for incoming corporate business. Many professionals will inevitably travel for work again, and conferences and events will be rescheduled.

#### *Tourism Product Registration and Sector Compliance*

Every tourism business has rules, regulations and standards that it needs to uphold to operate lawfully. Those businesses that are non-compliant fail to fulfil these requirements. The Free State experiences challenges with businesses that are not properly documented and not registered in terms of the Business Act 71 of 1991.

**Business registration and tax compliance:** The province should explore mechanisms and ways of promoting the registration of tourism businesses. This is critical, especially in terms of destination management, product marketing campaigns and regulating the tourism sector. There is a trend in new businesses being developed amid the pandemic as many people lost their jobs and are now starting their own businesses. These businesses need relevant training and guidance in how these registration processes work and what is required of them. Emphasis should be placed on the importance of deadlines as people are not familiar with compliance and how to start a business from scratch.

In addition, businesses need to be compliant to be registered on the province's accommodation database. Challenges arise when businesses make late UIF payments and are then immediately labelled as non-compliant. To have this rectified is a logistical nightmare as systems are not effective in helping to resolve these issues. It is recommended that SARS make these processes more user-friendly.

- It is important to facilitate a relationship with SARS to create more awareness of business registration and tax compliance.
- Encourage business owners to register their businesses and make use of support provision—such as the free workshops hosted by SARS to assist business owners.
- Consider providing incentive programmes to business owners.
- Only registered tourism businesses should enjoy marketing and networking privileges when it comes to marketing the Free State as a destination.

**Grading of accommodation:** Although tourism grading is not compulsory, business owners are encouraged to get their businesses graded (accommodation and conference facilities). The grading process is thorough, more focused on experience and administers strict rules that have created a trusted benchmarking system for the various accommodation types/sectors. There are, however,

many “fly-by-nights” businesses operating in this space, which compromises the provision of quality products and services.

**Adherence to COVID-19 safety protocols:** Non-compliance with health and safety standards not only puts tourists and employees at risk but also harms the future of tourism businesses. If COVID-19 cases surge at any point, stricter lockdown rules are put in place, which has severe, negative impacts on the tourism sector and the economy in general. Businesses are encouraged to adhere to these regulations and ensure the safety of staff and visitors alike.

The South African COVID-19 Online Resource and News Portal is a platform that provides the latest pandemic news and statistics, as well as information on relevant guidelines and relief initiatives.

- **Appoint a government entity to manage tourism business compliance through continuous verifying and monitoring of these regulations.**
- **Establish a communication channel where sector players can report on non-compliance and other suspicious/unethical practices or conduct in this regard.**
- **Database management should be prioritised and continuously updated to keep track of the businesses that are currently registered and operating within the tourism sector.**

### *Community-Based Tourism*

Communities play an indispensable role in tourism as they form part of the tourism ‘product’. Communities form part of the hosts in a destination and therefore have an impact on the development and delivery of a tourism product. When communities are not included/not participants in tourism practices, they may develop a mindset of alienation and through this refrain from supporting such initiatives. The lack of participation is partly due to the lack of awareness and lack of knowledge of tourism information. If effectively addressed and implemented, community participation positively influences social development, supports local integration, and contributes to transformation progress. Also, the involvement of local communities not only enhances socio-economic development but also establishes within them a responsibility to protect the industry and all its aspects.





The unique cultural offerings provided by destinations have become a major driver and motivation for tourists worldwide. As mentioned before, local community participation is important in tourism product development, and these routes offer opportunities for participation as well as local community development.

The combination of culture, heritage and tourism is, therefore, a potent economic engine. Cultural heritage tourism has the potential to provide opportunities for a wide range of SMMEs in the arts and craft industries, cultural landscapes and heritage sites, and cultural festivals.

- **Local government should facilitate the participation of local communities in the tourism sector.**
- **Assist communities and community groups in organising themselves, preparing themselves for tourism and implementing tourism projects.**
- **Liaise with the private sector and communities to generate more community involvement in the tourism sector and stronger private sector commitment.**


*Tourism Route Development*

Various opportunities exist in the province to expand on/revitalise and develop new tourism routes. One such route that has the potential to grow tourism in the FS, is the Karoo Oasis Route.

Figure 46: Karoo Oasis Route

### Route Concept

In the dry Karoo landscape, water is the most precious treasure. The Karoo Oasis Route celebrates the rivers of this mystical landscape – the Orange River, the Seekoei River, and the Riet River. For thousands of years, these rivers enabled ancient Khoisan communities to survive, and more recently, they attracted settler farmers. Modern man has built new attractions – the Gariep Dam and the Vanderkloof Dam. These vast water bodies offer a true oasis for travellers.



### Packaging & Marketing

- Cruise the Upper Karoo small towns: De Aar, Colesberg, Hanover, Britstown, Strydenburg, Philippstown, Petrusville
- Enjoy the waters of the Karoo Riviera: Gariep Dam, Vanderkloof, Bethulie, Norvalspont, Orania, Hopetown, and Oviston
- Follow the trail of the Anglo-Boer War 1899 Western Front: Modder River, Belmont, Jacobsdal and Kimberley
- Explore the towns in the 1900 Anglo Boer War campaigns in the southern Free State: Philippolis, Fauresmith, Jagersfontein, Koffiefontein and Jacobsdal
- Explore the Karoo Creative Towns: Art and literature in Richmond, Philippolis, and Nieu Bethesda (the source of the Seekoei River)

### Positioning (main towns)

- The Route will include towns which are within “striking distance” of the two dams and the main rivers (Orange River, Riet River, Seekoei River).
- Key NC towns: Colesberg (probably the heritage “hub” of the route), Hanover, De Aar, Norvalspont, Noupoort, Richmond, Philipstown, Petrusville, Strydenburg, Hopetown, Ritchie, up to Douglas where the Orange meets the Vaal.
- Key FS towns: Bethulie, Philippolis, Luckhoff, Koffiefontein, Jacobsdal, Fauresmith, Jagersfontein, possibly Trompsburg.
- Key EC towns: Oviston, Venterstad, possibly Burgersdorp (which is culturally in the “Colesberg cultural sphere of influence”), Steynsburg, Middelburg, even Nieu-Bethesda as the source of the Seekoei River.
- Colesberg is a critical transport node
- Gariep Dam is the tourism hub of the route.

### Route Development Progress

The original concept for a trans-provincial route, straddling the Orange River and including the two main dams originated in the early 2000s to include the following provinces- Free State, Northern Cape and Eastern Cape.

- Initially, a committee was established which developed the concept, and was ready to launch it. Unfortunately, due to political difficulties relating to ownership of the Route, the entire initiative collapsed.
- The concept re-emerged in 2010, dubbed the “Karoo Riviera”. The Karoo Development Foundation (KDF) wrote a proposal for the Northern Cape, however, due to a lack of provincial collaboration the idea was not further pursued.
- It was only until the Northern Cape wanted to have a route in the Upper Karoo, that the idea of the **Karoo Oasis Route** was born.

**Future Development for Route Support**


- ✓ Regional Karoo Development Agency
- ✓ Development of the Karoo Spatial Framework where the route will be included for regional development planning

### Stakeholders

- Karoo Development Foundation (KDF)
- DESTEA
- FSGLTA
- Department of Rural Development
- CUT Department of Tourism and Hospitality
- EC Government (Limited share of the route)
- NC Department of Tourism
- Khoisan Karoo Conservancy
- Private Sector in FS, NC and EC

### Opportunities

- ✓ Cross-provincial (inter-provincial) development opportunities
- ✓ Community beneficiation
- ✓ Product offering diversification
- ✓ Cycle Tours around the dams
- ✓ Safari packages
- ✓ Heritage preservation



## 5.5 Transformation

The development and growth of the tourism industry should occur at a grassroots level and not exclude poor communities. This could be unlocked by the sector working together and looking at priorities that present good growth opportunities that will ensure the inclusive participation of more black people—especially women and young entrepreneurs<sup>33</sup>.

### 5.5.1 Objectives




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<sup>33</sup> National Tourism Sector Strategy 2016-2026.

### 5.5.2 Key Considerations and Interventions

The following should be considered when addressing the transformation of the tourism sector.

	Key Considerations	Interventions
<b>Service Excellence</b>	<p>Service excellence needs to be prioritised through specific performance indicators that must be adhered to/achieved. This is also very important for marketing and serves as a way to improve the sector and the quality of the Free State’s tourism products and services in general.</p> <p>The Tourism Service Excellence Programme was initiated by the Department of Tourism in partnership with the Tourism Business Council of South Africa (TBCSA) with the view:</p> <ul style="list-style-type: none"> <li>➤ To develop an integrated approach to service excellence in the tourism sector</li> <li>➤ To rationalise efforts and develop a strategy that will guide service excellence in the sector</li> <li>➤ To create an enabling environment for developing a positive customer service culture.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Provide training to frontline staff to deliver quality services through awareness creation on the importance of customer care and introduce ways to monitor service standards.</li> <li>✓ Build a service excellence culture in the tourism value chain.</li> <li>✓ Transform service and create a customer service-orientated environment by crafting a solution-orientated culture of customer service.</li> <li>✓ Provide a pleasant and unforgettable service experience to the Free State’s visitors and all other customers in the tourism sector.</li> </ul>
<b>SMME Development Support</b>	<p>Transforming the sector means providing economic growth opportunities to the youth, women and other previously disadvantaged groups and equipping them with the right tools and skills to make the best of those opportunities. SMMEs are said to be the core of the South African tourism sector.</p> <p>SMMEs cultivate entrepreneurship, develop skills and provide employment opportunities to previously disadvantaged individuals and those with the potential to become tourism product owners. Considering the above-mentioned, the Free State PTSS must make provision for and encourage SMME development to sustainably expand the provincial tourism</p>	<ul style="list-style-type: none"> <li>✓ Aid SMMEs in funding applications and business registration processes.</li> <li>✓ Centralised efforts to assist with SMME development should be the main focus.</li> <li>✓ The development of SMMEs in townships and rural areas will increase employment opportunities and expand the current tourism offerings.</li> <li>✓ Develop a roadmap/catalogue of all the products that are registered or in need of skills transfer and/or funding.</li> <li>✓ Customer training is provided by SEDA for small businesses.</li> <li>✓ Introduce best practice approaches and risk management tools for SMMEs.</li> </ul>

	Key Considerations	Interventions
	<p>sector, as highlighted in various policies and legislative documents.</p>	<ul style="list-style-type: none"> <li>✓ Develop online support programmes/training in which business owners can participate.</li> <li>✓ ICT is still a challenge for most businesses/entities. Digital marketing and related training to be provided.</li> <li>✓ SARS is assisting small businesses with educational platforms, mainly through electronic use.</li> </ul>
<p><b>Small Business Funding</b></p>	<p>The main challenges experienced when it comes to applying for funding include:</p> <ul style="list-style-type: none"> <li>➤ The creditworthiness of businesses is not sufficient.</li> <li>➤ Businesses often do not have enough experience in the industry</li> </ul> <p>COVID-19 Relief Funding:</p> <ul style="list-style-type: none"> <li>➤ The majority of tourism businesses experienced challenges in applying for the tourism relief fund, which was further affected by the limited time limit for response.</li> <li>➤ Logistical problems were experienced with applications for the tourism relief fund.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Funding/grants are available from government institutions.</li> <li>✓ Host workshops and exhibitions to create awareness of funding support systems</li> <li>✓ Enforce accountability within departments and organisations relating to the approval and allocation of funding towards tourism to eliminate the mismanagement of funds</li> </ul>
<p><b>Skills Transfer</b></p>	<p>Ever-changing consumer preferences and tourism trends require skills development that is adaptable to any demands. Effective skills development will encourage entrepreneurial activities amongst tourism product owners, which will be beneficial to the provincial tourism sector in line with the cultural significance and rich heritage of the province.</p>	<ul style="list-style-type: none"> <li>✓ Tertiary education and skills training should be aligned with the priority economic sectors within the province to optimally utilise local opportunities in these sectors.</li> <li>✓ Link/connect to national/provincial incubation programmes.</li> <li>✓ Provide opportunities for people who go through support programmes to be absorbed in the sector.</li> <li>✓ Host workshops and roadshows with training programmes and services companies to create awareness of all available skills training.</li> <li>✓ Skills development in marketing is required; this includes the use of social media, service quality and business management elements.</li> </ul>

*Existing Support Structures and Funding Channels*

Training and skills development initiatives focus on business counselling, training, planning, building and mentorship. It is important to note that stronger awareness should be created for all the youth-related programmes through promotion and marketing campaigns. In many cases, entrepreneurs are unaware of all these opportunities as the relevant information is not reaching them. Funding channels are available through SEDA, IDC, NEF and SEFA, to mention a few. Various government and other organisations are providing the support and mentorship needed to guide new and aspiring entrepreneurs to build their businesses.

The following programmes encourage entrepreneurial activities, assist in skills development and job creation, and stimulate sector growth. Note that these programmes were established on a national level, which can benefit tourism-related businesses nationwide (including the Free State tourism sector), depending on programme criteria.

Table 6: Existing Support Structures

Programme	Description
<p><b>Small Enterprise Development Agency (SEDA)</b></p>	<p>SEDA’s ultimate objective is to provide support and promote sustainable development for SMMEs nationwide and ensure they can build business partnerships by linking them with relevant role-players on domestic and international levels. Furthermore, the agency implements programmes targeted at business development in areas identified by the government.</p>
<p><b>Business Growth/Resilience Facility</b></p>	<p>The Business Growth/Resilience Facility was established amid the global COVID-19 pandemic to benefit SMMEs (qualified by criteria) by providing adequate support due to a shortage of goods in the local market. This facility will</p>

Programme	Description
	provide SMMEs with the advantage of supply opportunities in response to challenges experienced caused by the pandemic.
<b>South African Tourism Services Association (SATSA)</b>	The purpose of the association is to provide international buyers advice and information on quality tourism product partners in the South African inbound tourism sector while providing members key services and benefits. Members are represented at appropriate levels with government and non-governmental organisations on issues impacting the inbound tourism industry.
<b>Tourism Enterprise Development and Support Programme (TEDSP)</b>	The TEDSP forms part of a greater objective of the NTSS to ensure the sustainable development and growth of tourism enterprises in a way that facilitates inclusive participation and job creation and contributes to the competitiveness of tourism destinations.
<b>Women in Tourism (WIT)</b>	The WIT initiative was established by the NDT to drive and support the development and empowerment of women in the tourism sector of South Africa. The initiative’s main objective is to ensure that women are Respected, Recognised, Represented and Rewarded in the sector.
<b>Tourism Grading Support Programme</b>	The purpose of the Tourism Grading Support Programme is to encourage wider participation in the Tourism Grading System and ensure consistent quality standards in the facilities and services provided by accommodation establishments. This initiative will contribute significantly to the service delivery excellence of the tourism sector.

Programme	Description
<p><b>Social Responsibility Implementation Programme (SRIP)</b></p>	<p>The purpose of the SRIP is to alleviate poverty and create jobs through tourism development. It, therefore, addresses the Department’s tourism development and growth objectives in a way that ensures contribution to job creation and community empowerment through appropriate training programmes.</p>
<p><b>Tourism Business Council of South Africa (TBCSA)</b></p>	<p>The organisation represents the unified voice of businesses in the travel and tourism sector. The purpose of the organisation is to unite and influence the diverse travel and tourism sector to contribute to a competitive, responsible, and inclusive tourism economy.</p>
<p><b>Public-Private Growth Initiative</b></p>	<p>The initiative was established by the government and private sector businesses to encourage engagements and build closer relationships between government and private sector organisations in which the alignment of plans and objectives of both sectors can be enhanced.</p>
<p><b>Fair Trade Tourism (FTT)</b></p>	<p>Fair Trade Tourism is a non-profit organisation that leads the way forward in the development of sustainable and responsible tourism in SA. It focuses on growing awareness about responsible tourism amongst travellers, assisting tourism businesses to operate more sustainably, and facilitating the FTT certification programme across Southern Africa.</p>
<p><b>Market Access Support Programme</b></p>	<p>The support offered in the Market Access Support Programme typically includes contributions towards the cost of participation, accommodation and economy-class return airfare for applicants approved for support. The cost of participation (i.e., exhibition fees) at a particular trade platform is paid upfront to the event organiser by the</p>

Programme	Description
	Department on behalf of approved applicants. However, as part of their commitment, approved applicants are required to initially pay for their own return airfare and accommodation costs. Upon receipt of a valid claim (and relevant supporting documentation) post participation, the Department will reimburse approved applicants for the cost of accommodation and return airfare (up to the approved capped amount) as agreed in the contract with the Department
<b>B-BBBEE Portal</b>	The portal is a matchmaking platform whereby large enterprises can identify, reach, compare, shortlist, and finally procure goods and services from 100% black-owned suppliers.

The following funding support channels are available on the national and provincial levels.

Table 7: Funding Channels

Programme	Description
<b>Tourism Equity Fund (TEF)</b>	This is a dedicated fund that provides a combination of grant funding, concessionary loans, and debt finance to support equity acquisitions as well as new and expansion developments in the tourism sector by black entrepreneurs.
<b>National Empowerment Fund (NEF)</b>	The National Empowerment Fund (NEF) was developed to promote Broad-Based Black Economic Empowerment (B-BBEE). The purpose of this fund is to anticipate future funding and investment required for supporting SMMEs and previously



Programme	Description
	disadvantaged individuals to enable them to establish their own sustainable businesses. The availability of this fund will enhance entrepreneurial activities.
<p><b>National Youth Development Agency (NYDA)</b></p>	<p>The agency prioritises the provision of financial support to businesses owned by South African youth in the form of business loans and micro-financial grants. The monetary grants include financial support, while the non-monetary grants include mentorship programmes, voucher programmes, market linkages, entrepreneurship development programmes, youth co-operative development programmes and other business support services required.</p>
<p><b>SMME Debt Relief Scheme</b></p>	<p>The scheme was developed to assist SMMEs (qualified by criteria) in their financial debt caused by the COVID-19 pandemic.</p>
<p><b>Tourism Support Programme (TSP)</b></p>	<p>The TSP was established by the national government as a reimbursable cash grant aiming to support the development of tourism enterprises that will stimulate job creation, increase the development of tourism enterprises, and cultivate the geographical spread of tourism investment.</p>
<p><b>Green Tourism Incentive Programme (GTIP)</b></p>	<p>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 private sector tourism enterprises in reducing the costs of investing in more energy- and water-efficient operations while increasing their competitiveness, profitability, and operational sustainability in the long term.</p>

Programme	Description
<p><b>Small Enterprise Finance Development Agency (SEFA)</b></p>	<p>The agency was established to focus on the provision of financial support through approving SMMEs and co-operatives. The purpose of the agency is to foster the establishment, development, and growth of SMMEs and co-operatives to contribute towards poverty alleviation, job creation and economic growth.</p>
<p><b>Tourism Transformation Fund (TTF)</b></p>	<p>The TTF was established as a dedicated capital investment funding mechanism by the NDT in collaboration with the NEF and focuses on financial support for black investors and communities investing in capital projects within the tourism sector.</p>
<p><b>Tourism Relief Fund COVID-19</b></p>	<p>The Tourism Relief Funding initiative was established by the NDT as an intervention to mitigate the negative impact of the COVID-19 pandemic on the tourism sector. The intervention provides once-off, capped grant assistance to SMMEs that will ensure sustainability during and after the worldwide pandemic.</p>

### *Lack of Funding*

One of the biggest challenges that were highlighted across all Districts is the lack of funding. No development can take place if there are no funds available.

The Tourism Equity Fund (TEF) that was recently introduced recognises that the capital-intensive nature of the industry is preventing new and existing black-owned tourism enterprises from meaningfully participating in and contributing towards this sector. By providing access to finance for black-owned, commercially viable tourism projects, the TEF is intended to address one of the major challenges to the transformation of the tourism sector.



The TEF is a dedicated fund that provides a combination of grant funding, concessionary loans and debt finance to support equity acquisitions as well as new and expansion developments in the tourism sector by black entrepreneurs.

The objectives of the TEF are as follows:

- To fund commercially viable and sustainable, majority black-owned (minimum 51%) tourism enterprises, including enterprises in rural areas and townships, to promote the alleviation of poverty, inequality and the growth of black-controlled tourism enterprises.
- To de-risk, the funding provided to tourism enterprises through patient capital will ease the debt repayment ability of black-controlled enterprises.
- To facilitate the participation of targeted groups such as women and youth in the priority tourism sectors as defined by the Amended Tourism B-BBEE Sector codes.

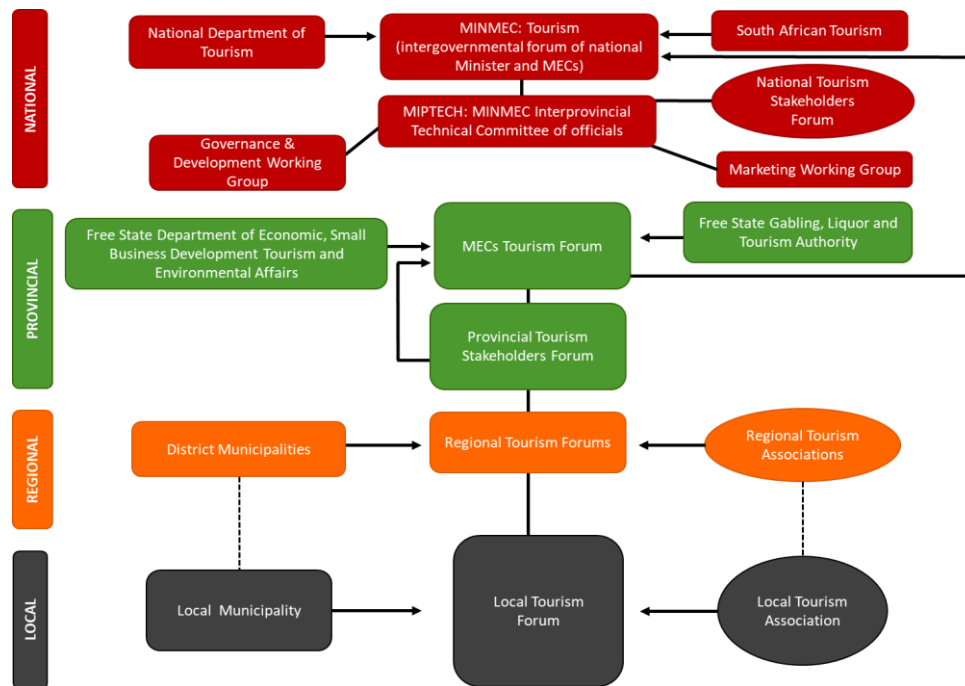
It is recommended that the Free State consider matching tourism prioritisation with funding and human resources to ensure that development can take place.

## SECTION 6: INSTITUTIONAL ARRANGEMENTS

### 6.1 Institutional Arrangement Structure

The institutional responsibilities on the various levels of government are briefly discussed below regarding the *recommended* institutional structure represented in the NTSS.

Figure 47: Tourism Institutional Structure



Source: Adapted from NTSS

#### 6.1.1 National Level

On the national level, key structures include the National Department of Tourism, which is responsible for national tourism policy, regulation and development. South African Tourism is responsible for marketing South Africa as a tourism destination and providing strategic leadership on convention bureaus. MIPTECH coordinates provincial and national affairs in preparation for the MINMEC, whereas the MINMEC discusses and agrees on national tourism policy matters. To ensure coordination and collaboration, the Tourism Working Groups deal with governance, planning and marketing issues as an intergovernmental structure. The National Tourism Stakeholder Forum, coordinated by the NDT, addresses strategic issues including, for example, the implementation of the NTSS. To ensure that provincial priorities are considered at the national level, the MEC takes these matters to MINMEC for consideration.

### 6.1.2 Provincial Level

On the provincial level, the Free State Department: Economic, Small Business Development, Tourism and Environmental Affairs (DESTEA) is mandated by legislation to develop tourism. Their mission is to drive environmentally sustainable economic growth and transformation for the benefit of the Free State province and its citizens through the creation of a conducive environment for trade and investment, including the establishment of a progressive policy framework to promote wealth creation and equitable wealth distribution for economic transformation, preservation and sustainable use of natural resources.

The strategic objectives of the provincial tourism marketing authority, the Free State Gambling, Liquor and Tourism Authority (FSGLTA), are to ensure the effective and efficient marketing of tourism, promotion of tourism and development of sustainable tourism within the province; an effective tourism marketing and promotion strategy; marketing initiatives adequately covering provincial geographic spread and seasonality; effective utilisation of media platforms; and hosting of events to promote the Free State province as a tourist destination of choice. Through the authority, resources (i.e., human resource capacity, funding, tourism expertise and marketing strategies) are directed and applied towards promoting the province and enhancing its competitiveness.

### 6.1.3 District and Local Level

On a regional level, the tourism forums determine tourism priorities to support sector growth and development in the region. They also facilitate cooperation and alignment with provincial tourism development priorities. This arrangement, although not a formal institution, can be replicated on the local level whereby local municipalities and LTOs communicate relevant tourism priorities/constraints with one another. 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) have been welcomed by district municipalities in the Province. They are seen as good vehicles to support the growth of the tourism sector and to encourage the involvement of all South Africans in the sector. The district municipalities are considering financial and non-financial support to some of the operational programmes of RTOs once transformation has been achieved.

## 6.2 Stakeholder Management

The principles of tourism-related policies underpin the importance of collaboration and cooperation between all key stakeholders. This is crucial to ensure that the tourism sector effectively contributes

to the local economic development of a province. The table below states the role and responsibilities of the government and the private sector.

Table 8: Stakeholder Responsibilities in Tourism Development and Management

Role in Destination Tourism Development and Management	
<b>Provincial Government</b>	<ul style="list-style-type: none"> <li>➤ Formulate tourism policies that apply to their areas, under the national policy.</li> <li>➤ Be partners in the implementation of relevant national policies, strategies, and objectives.</li> <li>➤ Responsible for marketing and promoting their destinations. As is the practice in many other countries, the provincial government should have the responsibility to market the province to the domestic market in competition with other provinces.</li> <li>➤ The national and provincial tourism organisations should agree on a strong, effective marketing strategy (when it comes to international marketing) to be coordinated at the national level and executed with the participation and support of the provincial organisations.</li> <li>➤ Play a more prominent role in tourism development activities than the national government. Such a role includes the involvement of local communities, environmental management, safety and security of visitors, tourism plant development, infrastructure provision, etc. Budgets and resources allocated to provinces will need to reflect this reality.</li> </ul>
<b>Local Government</b>	<ul style="list-style-type: none"> <li>➤ Responsible for land-use planning, urban and rural development.</li> <li>➤ Control over land use and land allocation.</li> <li>➤ Provide and maintain tourist services, sites, and attractions, e.g., camping and caravan sites, recreational facilities (parks, historical buildings, sports facilities, theatres, museums, etc.) and public services.</li> <li>➤ Provide road signs under nationally established guidelines.</li> <li>➤ Market and promote specific local attractions and disseminate information in this regard.</li> <li>➤ Control public health and safety.</li> <li>➤ Facilitate the participation of local communities in the tourism industry.</li> <li>➤ Provide adequate parking.</li> <li>➤ Facilitate the establishment of appropriate public transportation services, e.g., taxi services.</li> <li>➤ License establishments under the national framework.</li> <li>➤ Promote and financially support the establishment of local publicity associations/community tourism and marketing organisations to facilitate, market, coordinate and administer tourism initiatives.</li> </ul>

**Role in Destination Tourism Development and Management**

**Private Sector**

- Investment in the tourism industry.
- Operate and manage the tourism plant efficiently and profitably.
- Advertise and promote individual tourism services as well as the country—locally, regionally, and internationally.
- Continuously upgrade the skills of the workforce by continuously providing training and retraining.
- Continuously refurbish plant and equipment.
- Satisfy customer needs by providing quality products and services.
- Develop and promote socially and environmentally responsible tourism.
- Ensure the safety, security, and health of visitors in collaboration with the government and other private sector members.
- Collaborate with the government in planning, promoting, and marketing tourism.
- Involve local communities and previously neglected groups in the tourism industry through establishing partnership ventures with communities, outsourcing, purchase of goods and services from communities (e.g., poultry, herbs, vegetables and other agricultural supplies, entertainment, laundry services, etc.).
- Enable communities to benefit from tourism development, for example, communities benefiting directly from new reticulation systems and village electrification programmes developed through tourism investment in rural areas.
- Operate according to appropriate standards.
- Efficiently organise itself to speak with one voice.
- Represent the interests of private business on the boards of the major national and provincial tourism bodies.

## SECTION 7: IMPLEMENTATION PLAN

The implementation plan 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 strategy. The Free State’s vision for tourism can be realised should the institutional framework operate effectively in carrying out the implementation actions.

### 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:

Priority Level	
<b>Low</b>	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. This should be implemented in <b>5-10 years</b> .
<b>Medium</b>	These actions have equal priorities are carried out on a first-come-first-served basis They are ‘potentially critical’ and are subject to availability of resources These actions operate within medium business impact. This should be implemented in <b>3-5 years</b> .
<b>High</b>	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 in the next <b>1-2 years</b> .

Ongoing evaluation of the strategies and status of completing actions in all these different categories will be critical for the long-term revitalization of the tourism sector. The purpose of the Implementation Plan is to provide a collective resource that identifies the implementation action, the relevant stakeholders and the level of importance and urgency of each action.



## 7.2 Implementation Plan

### 7.2.1 Accessibility

Table 9: Implementation for Accessibility

Pillar	Focus Area		Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
Destination Accessibility	Universal Access		Accommodate the disabled in destination planning approaches- ablution, walkways, parking etc.	DESTEA, 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, FS DPRT, Infrastructure, Local Government, SANRAL, DESTEA	All Districts, for example: <ul style="list-style-type: none"> <li>➤ TMDM-Roads in Qwa-Qwa are terrible- needs maintenance especially after heavy rains.</li> <li>➤ FDDM- Road maintenance in the rural Parys area is an enormous challenge.</li> <li>➤ Xhariep- Road maintenance- particularly R702 and S2</li> </ul>	
			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			

Pillar	Focus Area		Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
	<b>Signage</b>		Conduct tourism signage audits/mapping to identify and address signage needs and challenges		All Districts	
			Put up more signage alongside major tourism routes/hubs			
			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			
			Provide facilitation with these applications and provide a support process to help with the signage across the FS			
	<b>Transport</b>		Engage with private and public transport companies to create linkages between attractions and activities.	Department of Transport, Private Sector	All Districts	
			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) buses between different towns and to and from tourist attractions		➤ Virginia and Hennenman	

Pillar	Focus Area		Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
			Creation of activity nodes where tourists can come together and decide which activity to participate in from there they can get on a shuttle and be transported to the activity		All Districts	
		<b>Access to Information and ICT</b>	Provide relevant and reliable product information on marketing agency websites and business websites	DESTEa, FSGLTA, Municipalities, Private Sector	All Districts	
			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			
			Provide marketing training/support to businesses on how to effectively promote their offerings.			
			Roll-out of internet/fibre/Wi-Fi is vital to the growth of the tourism sector		All Districts, for example: ➤ Xhariep District and Thaba Nchu)	

### 7.2.2 Marketing

Table 10: Implementation for Marketing

Focus Area	Actions	Key Stakeholders	Priority Regions	Timeframe Priority
<b>Market Segmentation</b>	Focus marketing efforts and tour packages to specific markets i.e., domestic market- millennials, families, couples, seniors, backpackers	FSGLTA, Travel Agent, Tour operators, Product Owners, Local Government	All Districts	
	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			
<b>Brand Establishment</b>	Develop a Provincial Tourism Marketing Strategy for the Free State and benchmark it with destination marketing strategies such as the WC and KZN	FSGLTA, Travel Agent, Tour operators, Product Owners, Local Government	All Districts	
	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 Free State to promote offerings in all regions			

Focus Area	Actions	Key Stakeholders	Priority Regions	Timeframe Priority
<b>Digitalisation</b>	Investigate the viability of App development for the province but also the individual districts	FSGLTA, DESTEА, Private Sector, Municipalities	All Districts	
	Provide support to SMMEs on internal operations i.e., for sales and marketing			
	Customise visitor experiences through digitalisation			
	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			
<b>Innovative New Marketing Avenue</b>	Proposal for a magazine programme called “Detour”. The programme will look at all the top travel destinations in the Free State. It will not only be a platform for sharing information and knowledge about the Free State tourism industry but, it will also assist in attracting new customers for all the destinations to be covered, leading to growth in the economy of the province. The episodes will be pre-recorded and broadcasted weekly. Subject area: • Travel • Cuisine • Leisure • Accommodation. This project needs funding and sponsors.	DESTEА, FSGLTA, Free State Online Channel, Product Owners	All Districts	
<b>VICs</b>	Determine the viability of VICs in the modern age, identify areas where there is a need for a VIC.	DESTEА, FSGLTA, Local Government, Private Sector	All Districts	
	Revitalise and reposition information centres across the province that are interactive and interpretive		➤ Upgrading of Phuthaditjhaba and Harrismith	

Focus Area	Actions	Key Stakeholders	Priority Regions	Timeframe Priority
	Employ trained and knowledgeable information officers to manage these posts		Information Centre All Districts where applicable	
<b>Increase LOS</b>	Attractive and affordable product packages can entice people to stay longer and explore more in the region. Target business travellers by packaging pre-and-post meeting/conference itineraries.	FSGLTA, DESTEa, Private Sector, Municipalities	All Districts	
<b>MICE Industry</b>	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 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 Develop tourism packages that are quick and easy for the limited time that business tourists spend at a destination	FSGLTA, DESTEa, Private Sector, Municipalities	All Districts	
<b>Events &amp; Festivals</b>	Revise the province's events calendar to identify events or other potential opportunities in this regard. Highlight existing events & festivals through more aggressive marketing- Mangaung Rose Festival, Ficksburg Cherry festival, Nampo, etc.	FSGLTA, DESTEa, Private Sector, Municipalities	All Districts	

Focus Area	Actions	Key Stakeholders	Priority Regions	Timeframe Priority
	Coordinate the events calendar to address challenges related to seasonality and the geographical spread of tourists in the province			
<b>Product Revitalisation</b>	Implement a stronger and more focused marketing approach to uplift the heritage and cultural offerings in the province as well as other identified niches	FSGLTA, DESTEa, Private Sector, Municipalities	Within all Districts where applicable, for example: <ul style="list-style-type: none"> <li>➤ The Xhariep Dam requires better promotion as a tourist destination.</li> <li>➤ Vredefort Dome needs to be uplifted</li> </ul>	
	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			
	Identify products that need upgrading and relevant infrastructure to be used for tourism purposes			
	Develop linkages with neighbouring destination to package existing products in new innovative way e.g., according to themes			
<b>Institutional Structure</b>	Investigate the potential of establishing more tourism marketing agencies/associations throughout the province to ensure targeted marketing of each region or district is taking place	District and Local Municipalities, Private Sector, FSGLTA, COGTA, Tourism Organisations	All Districts- currently only one RTO in Parys	
	Establish tourism forums to allow communication between the public and private sector		All Districts	
<b>Sector Collaboration</b>	Coordinate marketing and development initiatives between government departments, between the public and private sector	FSGLTA, DESTEa, Local Government, Tourism	All Districts	

Focus Area	Actions	Key Stakeholders	Priority Regions	Timeframe Priority
	Facilitate FSGLTA and RTO coordination	Organisations, Product Owners, COGTA		

### 7.2.3 Destination Management

Table 11: Implementation for Destination Management

Pillar	Focus Area	Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
Destination Management	Destination Readiness	Establish travel confidence by promoting the Free State as a safe destination that adheres to COVID-19 protocols/regulations	All	All Districts	
		Communicate with transparency and support destinations and companies to restore confidence among consumers to restart travel as soon as it is permitted			
		Promote domestic tourism to start rebuilding provincial economies			
		Hold non-compliant business accountable when it comes to COVID-19 health and safety protocols			
	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	Local Municipalities,	All Districts	



Pillar	Focus Area	Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
		Revise and publish/provide access to municipality by-laws that address these matters.	DESTEa, FSGLTA, Private Sector	All Districts	
		Ensure that public leisure areas, gardens and roads are kept clean and neat- launch clean-up campaigns/drives, get locals involved	DESTEa, Local Municipalities, Private Sector, Environmental Organisations	All Districts, for example: <ul style="list-style-type: none"> <li>➤ Bloem Spruit, Old Fort, and Naval Hill.</li> </ul>	
	<b>Database Management</b>	Conduct product audits in all regions to identify business status, challenges and address problems	DESTEa, Local Municipalities, Private Sector	All Districts	
		Develop a data collection system in collaboration with other industry players to collect and store real data to generate more reliable statistical information to base strategies on			
	<b>Tour Guiding</b>	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, DESTEa, Tourism Organisations	All Districts	
		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			
		Tour guiding services need to be formalised more e.g., central location where guides can meet up with tourists			

Pillar	Focus Area	Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority	
		Conduct a screening exercise on tour guides in the province to monitor illegal guiding activities				
	Institutional Functioning	Policies and Legislation	Develop a provincial policy specifically for tourism	Provincial and Local Government, COGTA	All Districts	
			IDPs need to align with common provincial tourism objectives. Currently, they are working in silos.			
			Prioritise the alignment of municipality by-laws and district e.g., with specific regards to zoning.			
		Institutional Arrangements	Coordination between departments for effective communication and execution of functions	DESTEA, Local Government, Tourism Organisations, Private Sector		
			Promote stronger collaboration with the private sector so that opportunities and challenges can be dealt with as soon as they are raised			
			Develop interactive communication/participation platforms with local communities to create awareness and educate on eco-tourism initiatives e.g., greening of products			
			Host workshops and roadshows with Training Programmes and Services companies to create awareness of all available skills training			
		Grading of Accommodation	Develop support programmes to guide product owners in the grading process			

Pillar	Focus Area	Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
		Promote meaningful benefits and cost structure to encourage grading	DESTEa, FSGLTA, TGCSA, Private Sector		
	<b>Tourist Safety</b>	Tourism Police Units at tourism 'hubs'/strikes on roads- Visible policing	DESTEa, SAPS, Department of Public Works and Infrastructure	All Districts, for example: ➤ Naval Hill	
		Ensure effective responses to incidents of crimes against tourists			
		CCTV Cameras at busy touristic spots (at attractions & activities)			
		Visibility of, and access to emergency services information			
		Provide safety advice to tourists to create awareness of various risks			
		Conduct safety perception surveys/scoping exercises with visitors			
	<b>Sustainable and Responsible Tourism Practices</b>	Emphasise conservation of assets and educate the importance thereof	Private sector, DESTEa, Department of Environmental Affairs, Municipalities	All Districts	
		Host Responsible tourism workshops/awareness projects/ implement a 'Responsible Tourism Day' that features various informative discussion sessions. Get experts to lead talks.			
		Implement educational conservation projects/activities and get communities and local schools involved			

### 7.2.4 Product Development

Table 12: Implementation for Product Development

Pillar	Focus Area	Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
	Niche Development	Adventure	Private Sector, DESTEA, FSGLTA, Tour Operators	All Districts where applicable, for example <ul style="list-style-type: none"> <li>➤ Hiking and biking trails in Thabo Mofutsanyana District</li> <li>➤ Fezile Dabi District- water activities,</li> <li>➤ Other- hiking trails, abseiling, paragliding, canoeing, horse riding, mountain biking, golf, etc.</li> </ul>	High
		Investigate the possibility to expand on hiking and mountain biking routes			
		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 it is low-risk activities and will also attract the domestic market.			
	Entertainment	Theme Park Development	Private Sector, Provincial and Local Government, Tourism Organisations, FSGLTA, DESTEA, Developers, consultants, etc.	<ul style="list-style-type: none"> <li>➤ Conduct a feasibility study to identify the ideal location within the province</li> </ul>	Medium
Dark Tourism	Promote the dark tourism route developed by the CUT Department of Tourism and Hospitality	DESTEA, FSGLTA, CUT Department of Tourism and Hospitality	All Districts where applicable, for example: <ul style="list-style-type: none"> <li>➤ Xhariep District war sites</li> </ul>	High	
Agritourism	Incorporate the farmers into an agri-tourism route, thereby opening doors		All Districts where applicable, for example:	High	

Pillar	Focus Area		Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
			to a potential tourism market which can help keep their farming sustainable	DESTEa, FSGLTA, Private Sector, Communities	<ul style="list-style-type: none"> <li>➤ Mangaung- The Agri Park initiative to be established around Thaba Nchu as the Agri Hub and three surrounding Farmer Production Support Areas could make a significant contribution towards rural development in the north-eastern parts of the MMM.</li> <li>➤ Target high-value regions such as Bothaville and Hoopstad</li> </ul>	
		Collaborate and share information and strengthen communities to facilitate a sustainable future which allows for additional income sources for farmers				
		<b>Heritage &amp; Culture</b>	A stronger focus on heritage and cultural offerings-Monuments must feature constantly in marketing and are kept in good condition.		All Districts, for example: <ul style="list-style-type: none"> <li>➤ Kroonstad- The R82 Battlefield Route from Kroonstad to Greenlands, including the Rooiwal Battlefield, has been officially established.</li> <li>➤ Other sites of significant value are the Vredefortweg Concentration Camp Cemetery (Koppies district).</li> <li>➤ As a result of the Boer Matabeli War, the Kwantitise Battlefield, also known as the Vegkop Battlefield (Heilbron area), is considered as a</li> </ul>	

Pillar	Focus Area		Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
					significant tourist attraction- Anglo-Boer War route developed through the province by Tourism Dept CUT ➤ San rock art significance in eastern Free State- potential for route development	
			Package and market more interactive & educational cultural experiences for tourists	DESTEA, FSGLTA, Local Government, DAC, SAHRA, Municipalities, Private Sector	All Districts ➤ Leverage on the various cultures/cultural history in the province e.g., South Sotho (Basotho), San (Bushmen), Boers	
			Naval Hill Precinct Development		➤ Mangaung Metro	
			Develop more Arts and Cultural Centres where locals can present and sell their crafts, training and workshops can be conducted here too		➤ Dihlabeng LM- Rosendal Cultural Village needs an upgrade	
			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.		All districts where applicable, for example: ➤ Parys and Heilbron museums	

Pillar	Focus Area	Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
		Create a Political Historical Tourism attraction package. The ANC was born in the Free State and a lot of people are interested in the rich history of the movement.		All Districts where applicable, for example: <ul style="list-style-type: none"> <li>➤ Mangaung Metro</li> </ul>	
		Improve heritage management, maintenance and preservation methods.		All Districts <ul style="list-style-type: none"> <li>➤ Transnet’s Tourism, Hospitality and Heritage Portfolio is responsible for all tourism and heritage asset preservation activities to grow SA’s tourism footprint globally and locally. They will develop an effective Transnet Heritage Assets Strategy and require</li> </ul>	
	Culinary	Conduct a feasibility study on the development of a culinary route within the province	DESTEA, CUT Hospitality School, FSGLTA, Hospitality Industry, chef students	All Districts	
		Collaborate with CUT Tourism and Hospitality Departments to develop unique and innovative experiences/packages			
		Develop linkages between the heritage and cultural offerings and the culinary opportunities			

Pillar	Focus Area	Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
		Packaging a route based on the products produced by artisans in the province	Artisanal drinks route developed by CUT Tourism Dept.	All Districts, for example: ➤ To include Phillippolis, Bloemfontein, Hennenman, Kroonstad, Parys, Memel, and Clarens.	
	<b>Palaeontology</b>	The Dinosaur Interpretation Centre will be a strong drawcard to the Province.	NDT, SAHRA, SANPARKS, DESTEА, FSGLTA, Local Government, GGHP	➤ Thabo Mofutsanyana District-Golden Gate National Park	
	<b>Health &amp; Wellness</b>	Conduct a feasibility study on the availability of relevant product/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), DESTEА, FSGLTA, Tourism Organisations, Provincial and Local Government	All Districts	
	<b>Glamping</b>	Identify suitable locations for such development	Privat Sector, DESTEА, FSGLTA	All Districts, for example: ➤ Thabo Mofutsanyana District has so far been identified for the development of this niche ➤ Glamping can be found at Letsatsi, Eco Karoo Lodge near Fauresmith, Southern Free State	
		Collaborate with interested parties			
<b>Kasie Tourism</b>	Create stronger awareness of Kasie tourist attractions				
	Create a platform to forge linkages as well as network opportunity between				



Pillar	Focus Area	Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
		tourism establishments and the local community	DESTEA, FSGLTA, Local Government, Private Sector, DSACR, local communities	All Districts	
		Target <i>After Tears</i> functions and other gatherings/celebrations to be hosted at Kasi venues			
		Develop initiatives for Youth and Women involvement in Kasi tourism initiatives.			
	<b>Community-based Tourism</b>	Community-based Tourism- Develop participation packages for tourists to interact with local communities and learn about local cultural practices	Communities, Community Organisations, DESTEA, private sector, local government	All Districts	
		Implement educational element to tourist experiences where local history, culture and heritage and environmental conservation is shared with visitors			
	<b>Sport</b>	Motivate more sporting and adventure events		All Districts where applicable, for example:	
Investigate viable areas throughout the provinces that has the potential to host sporting events					

Pillar	Focus Area		Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
			<p>Conduct infrastructure upgrades where necessary to improve facilities for sport tourism</p> <hr/> <p>Effectively market these events</p>	Sport Organisations, Sport Unions, DESTEA, DSACR, Provincial & Local Government, FSGLTA, Tourism Organisations	<p>as it was the priority. The construction of multipurpose courts outside the stadium should be considered.</p> <ul style="list-style-type: none"> <li>➤ Metsimaholo LM- Fishing Competitions</li> <li>➤ Xhariep- sports tourism in the Gariiep Dam and Tussen die Riviere and Mynhardt game reserves.</li> <li>➤ Horse racing in Fauresmith</li> <li>➤ Lejweleputswa LM- Phakisa Raceway</li> </ul>	
		<b>Educational Tourism</b>	<ul style="list-style-type: none"> <li>✓ Opportunities to be identified, e.g., school trips, language acquisition/cultural knowledge trips, scholarships, university programmes through the Department of Education, etc.</li> <li>✓ Engage with relevant stakeholders is needed to develop opportunities within this niche area.</li> </ul>	DESTEA, CUT, Department of Education, Academia, Local Government	All Districts where applicable	

Pillar	Focus Area		Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
	Upgrading/ Revitalisation of products	Route Revitalisation	Upgrade offerings along the five main tourism routes, beautification, marketing efforts and linkages to main roads	DESTEA, FSGLTA, Local Government, CUT, Private Sector, Local Government	All Districts, for example: <ul style="list-style-type: none"> <li>➤ Upgrades to the main tourism route in each district</li> <li>➤ Promotion of the N5 Tourism Corridor, which starts in Winburg and links nodes such as Senekal, Bethlehem and Harrismith.</li> <li>➤ The Koepel Scenic Route (Sections of Roads S 264, 212, 80 &amp; 713) and the Vaal Eden Scenic Route (Sections of Roads S 1052 &amp; 171).</li> <li>➤ Maluti route which originates in the north and includes the towns of Wepener, Van Stadensrus, Zastron and Rouxville</li> <li>➤ Encourage the development of the Maloti and Gariep tourism corridors and Friendly N6 Route and ensure that the municipality derives the maximum benefits from this route.</li> <li>➤ Mangaung- regional development corridors to promote are the N8 corridor between Maseru and Bloemfontein and the N6-R26</li> </ul>	

Pillar	Focus Area	Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
				tourism corridor which is not optimally utilised at this stage.	
	<b>Revolving Restaurant-Fidel Castro Building</b>	<ul style="list-style-type: none"> <li>➤ Appoint a service provider to run the restaurant</li> <li>➤ Market the restaurant</li> <li>➤ Package other activities/sites with a visit to the restaurant</li> <li>➤ Collaborate with hospitality/chef schools/</li> <li>➤ Create opportunities for the youth in cuisine tourism</li> </ul>	DESTEА, Hospitality industry, local government, private sector	<ul style="list-style-type: none"> <li>➤ Mangaung Metro</li> </ul>	
	<b>Identify and upgrade products that can be used for tourism purposes</b>	<ul style="list-style-type: none"> <li>➤ Conduct an audit on municipal-owned entities that has tourism potential and can be developed as such</li> <li>➤ Put stronger emphasis on heritage and cultural offerings in the province</li> </ul>	Provincial and Local Government, DESTEА	All Districts, for example: <ul style="list-style-type: none"> <li>➤ Fezile Dabi-Mimosa Resort, Vredefort Dome, Jim Fouche' Entertainment Centre and Resort, Kroonpark Resort, Parys Station building,</li> <li>➤ Mangaung- The Old Fort, Wesleyan church in Waaihoek, President Brand Street.</li> <li>➤ Dihlabeng LM- Need for access to Nkokomani caves</li> <li>➤ Mohokare LM- Recreational Development at Smithfield Dam</li> <li>➤ LDM- Sandveld Nature Reserve, situated around the Bloemhof Dam, and the</li> </ul>	

Pillar	Focus Area		Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
					banks of the Vaal and Vet rivers offers the opportunity to develop resorts as a result of its potential to attract many tourists to the municipality ➤ Mangaung- Waihoek Precinct Development, commercialisation of resorts (Soetdoring, Maria Moroka, Phillip Sanders and Rustfontein dam)	
	<b>Product Packaging &amp; Linkages</b>		As the FS shares borders with EC and NC, investigate potential product linkages to cater to target markets.	Private Sector, DESTEA, FSGLTA, communities, local government, tourism marketing organisations	All Districts, for example:	
			Develop themed tours around the province’s history, culinary arts, heritage, culture and education.		➤ Xhariep- Capitalise on the border-sharing of Northern Cape and Eastern Cape ➤ Link Big Hole in Kimberley with Big Hole in Jagersfontein.	
			Co-package of similar products- investigate route development in this regard		➤ Establish the Karoo Oasis Route	
<b>PPPs</b>		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 Districts, for example:		
					➤ Events Industry ➤ Municipal owned assets	

Pillar	Focus Area	Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
		<p>Conduct pre-feasibility studies to determine the viability of such partnerships</p> <p>Ensure that suitable skills development programmes are made directly available to the private party to support its efforts</p>			
	<b>Events Calendar</b>	<ul style="list-style-type: none"> <li>➤ Develop &amp; host more festivals and events</li> <li>➤ Develop events calendar and coordination for seasonality and geographical spread.</li> <li>➤ Improve the services and access to municipal facilities for event usage.</li> <li>➤ Revive existing festivals</li> </ul>	District and Local Municipalities, FSGTLA, DESTEA, Private Sector	<p>All Districts for example:</p> <ul style="list-style-type: none"> <li>➤ Xhariep- Develop a big annual event e.g., water sports in either the Gariep Dam or Tussen die Riviere, launch "Summer Break Festival".</li> <li>➤ Lejweleputswa- proposals for the "Taste of Welkom" event</li> <li>➤ Fezile Dabi- Frankfort Wilge Makiti Festival</li> <li>➤ Mangaung-Revitalise the Mangaung Rose Festival and design an aggressive marketing strategy for both domestic and international tourist,</li> <li>➤ Create packages for Macufe Festival that includes tickets, accommodation and transport</li> </ul>	

Pillar	Focus Area	Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
				➤ Existing festivals- NAMPO, Ficksburg Cherry Festival, Bethlehem Air Show, etc.	
	<b>MICE Industry</b>	Extensively engage in comparative bidding/facilitation and coordination of MICE activities to take place in the province	District and Local Municipalities, FSGTLA, DESTEA, Private Sector, SAACI	All Districts	
		Look for cooperative advertising opportunities with business events partners			
		The development of an ICC in the Free State will unlock opportunities to host more international events and conferences		➤ Mangaung Metro	
<b>Air Access/ Airport Development</b>	Identify tourism development potential/ opportunities to leverage as part of the development process	Private Sector, Provincial & Local Government, DESTEA,	➤ Mangaung Airport Node- To provide a mixed-use of land which includes offices, general business, retail, showrooms, conference facilities, a hospital and clinics, places of worship, crèches, primary, secondary, and tertiary facilities, government buildings, open green and protected green space. The development will also rehabilitate the surrounding environment		

Pillar	Focus Area	Actions	Key Stakeholders	Priority Sites/Regions/Products/Events	Timeframe Priority
				which is currently in a very environmental deteriorating state. <ul style="list-style-type: none"> <li>➤ Thaba Nchu Airport- development for tourism purposes</li> <li>➤ Xhariep- Development of an airstrip for small charter flights between Gariep Dam and Bloemfontein would also enhance tourism potential in the District Municipality.</li> </ul>	

### 7.2.5 Transformation

Table 13: Implementation for Transformation

Pillar	Focus Area	Actions	Key Stakeholders	Priority Regions	Timeframe Priority
Transformation and SMME Development	Achieve Broad-Based Black Economic Empowerment (B-BBEE) Targets	Create awareness and provide business training to young entrepreneurs	DESTEA, NDT, Emerging SMMEs, Private Sector	All Districts	
		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	Key Stakeholders	Priority Regions	Timeframe Priority
		Host workshops & consultation sessions to create awareness & educate the people on the opportunities that they, as aspiring business owners, can capitalise on			
	<b>Service Excellence</b>	Build a service excellence culture in the tourism value chain	DESTEa, FSGLTA, TGCSA		
		Provide training to frontline staff to deliver quality services through awareness creation on the importance of customer care and introduce ways to monitor service standards.			
	<b>SMME Development Support</b>	The development of SMMEs in townships and rural areas will increase employment opportunities and expand the current tourism offerings	DESTEa, SEDA, CATHSSETA, SATSA, TBCSA, TGCSA, SMMEs		
		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.			
	Development of a local SMME web portal to provide online support programmes/training that business owners can participate in				

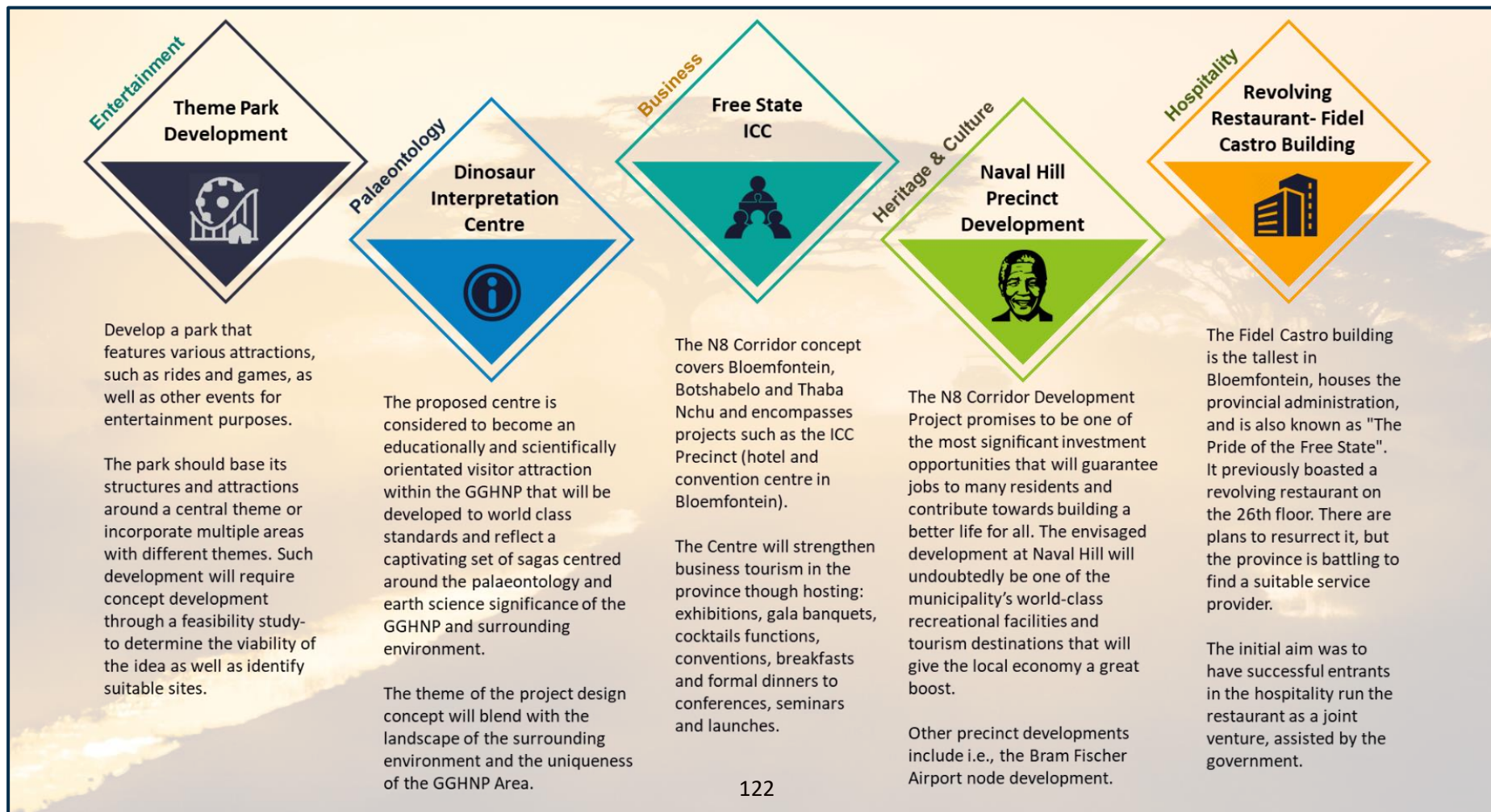
Pillar	Focus Area	Actions	Key Stakeholders	Priority Regions	Timeframe Priority
		Development proper market linkages that will allow SMME's to support each other and become sustainable			
		Consider the development of a Local Business Support Centre in each District for aspiring business people within the region to obtain direct access to training, funding institutions etc.			
	<b>Expand Benefits of Tourism to Rural Areas</b>	Develop tourism products for 'peripheral' areas, provide infrastructure to support crafters in displaying their work	DESTEA, FSGLTA, Community Organisations, Local Government, Private Sector		
		Develop activity nodes to attract tourists to these areas and encourage local community participation to expand 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			
	<b>Funding</b>	Create awareness of funding/grants that are available from government institutions.	DESTEA, 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			

Pillar	Focus Area	Actions	Key Stakeholders	Priority Regions	Timeframe Priority
	<b>Skills Transfer</b>	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, DESTEa, FSGLTA, District Municipalities, Private Sector		
		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			

### 7.3 Catalytic Projects

The figure below provides a summary of the catalytic projects that have been identified to grow the province’s tourism sector and diversify its offerings.

Figure 48: Summary of catalytic projects



## 7.4 Main Niche Development Areas

The figure below provides a summary of the main niche development areas that have been identified to diversify the province’s tourism sector.

Figure 49: Summary of main niche areas



## SECTION 8: RECOMMENDATIONS AND CONCLUSION

### 8.1 Recommendations

The following should be considered to enhance the Free State’s tourism performance and create an enabling environment that allows tourism activities to operate effectively:

#### 8.1.1 Institutional Arrangements

In terms of the institutional relationships and their general functioning, the following constraints negatively impact the tourism sector:

- ✚ The lack of effective communication between the public and private sector causes frustration and results in misunderstandings and feelings of alienation or disregard. This affects business confidence and prohibits successful collaborations to enhance tourism in the province.
- ✚ The lack of awareness and information dissemination also leads to a lack of acting and making the most of available opportunities. This relates to the communities who are not aware of how tourism works and its impact on society, entrepreneurs who are not aware of support programmes that can help them fund and build their businesses and government departments, and tourism organisations that are unaware of the projects and programmes initiated/hosted by one another.
- ✚ The lack of funding is a critical constraint on tourism growth.
- ✚ Land-use challenges—ensuring that public and private land is available for tourism development is essential but often involves conflicting political, socioeconomic, technical, legal and institutional interests.

To alleviate the impact of some of these barriers, the following recommendations are suggested.

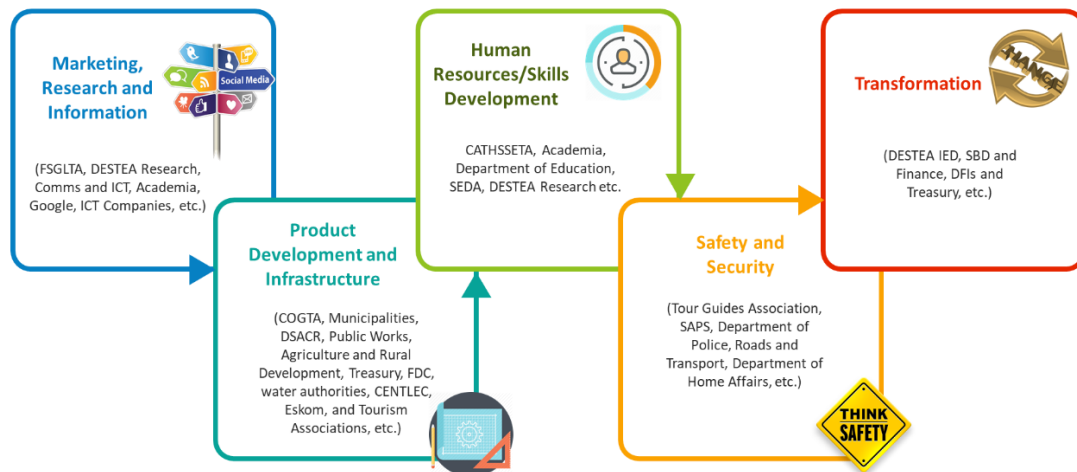
Table 14: Institutional Recommendations

<p><b>Information distribution between government spheres</b></p>	<ul style="list-style-type: none"> <li>➤ Effective coordination and management of information.</li> <li>➤ Stronger statistical representation.</li> <li>➤ ‘One mind’ approach.</li> <li>➤ The province should engage in information-sharing workshops to address important issues/matters in the tourism sector.</li> </ul>
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<b>Clarity on roles and responsibilities</b>	<ul style="list-style-type: none"> <li>➤ Clarity and focus on individual roles eliminate duplication of actions, unnecessary waste of resources and enhances overall productivity.</li> </ul>
<b>Availability and management of funds</b>	<ul style="list-style-type: none"> <li>➤ Better control and responsible management of the allocation of funds.</li> <li>➤ Follow up on progress and outcomes of funded projects.</li> <li>➤ Accountability within departments and organisations relating to the approval and allocation of funding towards tourism.</li> </ul>

To strengthen the institutional framework and capacity, it is recommended to host themed workshops that focus on the individual elements/factors that are vital for tourism growth and success. The figure below outlines the various suggested workshops and lists stakeholders to be included:

Figure 50: Workshops to strengthen institutional capacity



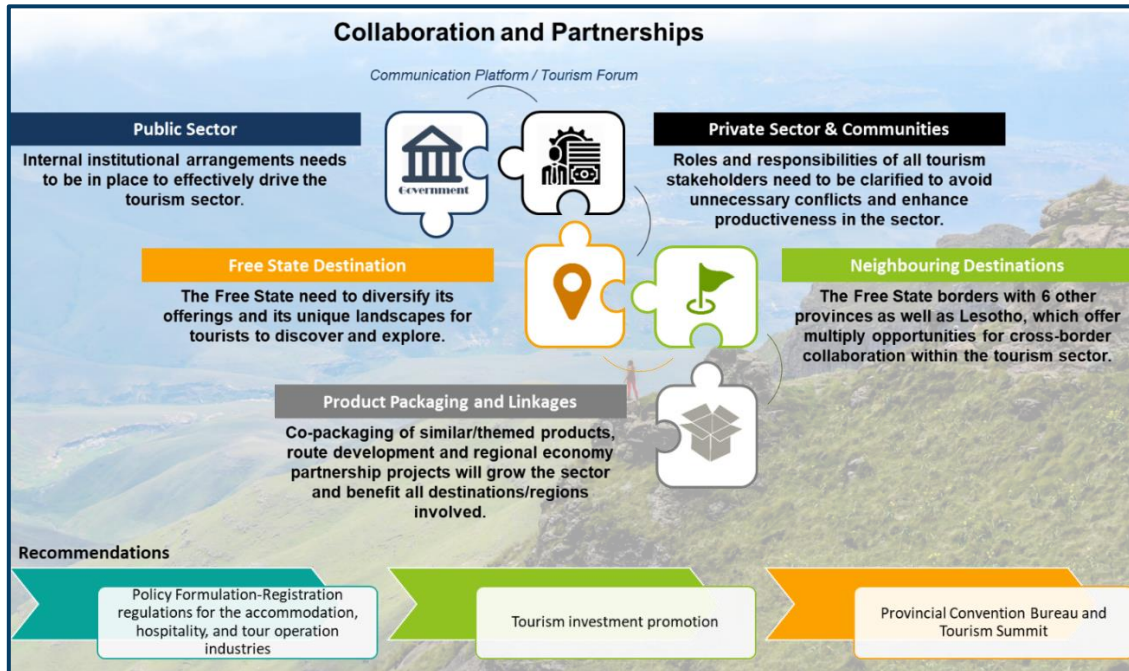
### 8.1.2 Developing Collaborative Solutions

The tourism industry cannot exist without partnerships and collaboration. Visitors are looking for a great experience, which can only be achieved if the various tourism partners work together. Sound partnerships form the basis of any successful tourism industry. These partnerships include the public sector, the private sector and communities<sup>34</sup>. The figure below illustrates where collaboration and

<sup>34</sup> National Tourism Sector Strategy 2016-2026

partnerships should be formed to ultimately grow the tourism sector and enhance the Free State’s competitiveness as a tourism destination.

Figure 51: Collaboration and Partnerships



Both the public and private sectors are dependent on effective institutional structures to increase functioning and provide platforms for effective communication between product owners, communities and all spheres of government. Cooperation between these two sectors allows destinations to offer quality products and to exceed consumer expectations, which will further ensure destination maintenance successfully and in the long term<sup>35</sup>.

Effective collaboration between all stakeholders is critical to developing an enabling environment for tourism to flourish. Collaboration also makes it possible to diversify product offerings and form joint-marketing and product packaging ventures which ensures a benefit flow to all parties involved.

The province should also investigate potential collaboration opportunities with neighbouring provinces and Lesotho to develop unique tourism offerings and co-package themed offerings (i.e. adventure activities, heritage and cultural products, sporting events, etc.)

Recommendations in this regard include:

- Provincial tourism policy formulation to better inform and regulate tourism practices

<sup>35</sup> Buhalis (2000).

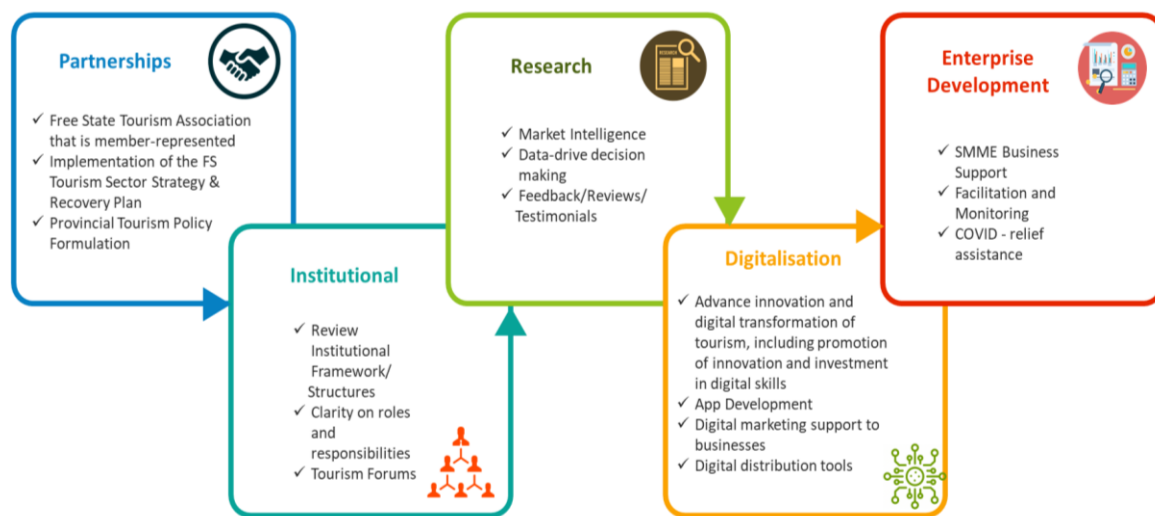


- Stronger focus on tourism investment promotion
- Establishing a Provincial Tourism Bureau and Tourism Summit. This will create awareness of tourism development, its associated benefits, and garner further support from sector players

### 8.1.3 Increasing Market Share

To develop collaborative solutions towards an increased tourism market share, the following should be prioritised:

Figure 52: Recommendations for improving the FS market share



## 8.2 Conclusion

The strategy aims to encourage sustainable tourism growth that is inclusive and where the benefits of tourism are distributed across all districts within the province. A successful tourism sector is one where all the districts can grow tourism in their individual areas in a way that enhances the overall performance and wellbeing of tourism businesses as well as local communities. This means working together with provincial and local government, and other tourism stakeholders to manage and sustain tourism growth. For the tourism sector strategy to be effective, stakeholders need to take ownership of the recommended actions and projects and have clarity on roles and responsibilities for implementation.

The successful implementation of these recommended actions will ultimately lead to growth in the tourism sector’s value, product diversity, and improved visitor experiences. It will also establish the province’s competitive advantages and increase potential investment in the sector.