



“Towards a Tourism service Excellence Culture in Limpopo – harnessing transformation within industry”

## **‘STATE OF LIMPOPO DESTINATION’**

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CEO: Limpopo Tourism and Parks

# Presentation outline

- Purpose of the presentation
- LTP's Mandate
- LTP's Vision
- Feedback on Meropa Declaration
- Tourism Strategic Objective (2006-2010)
  - 2005/6 financial year activities
  - 2006/7 financial year activities
  - 2007/8 financial year activities
- Limpopo's International Tourism Performance
- Limpopo's Domestic Tourism Performance
- Challenges and Obstacles
- Recommendations



# Purpose of the Presentation

- To report to the industry the following:
  - Communicate LTP's activities in achieving its mandate and objectives
  - Obstacles and challenges encountered in implementing the activities
  - Performance of the Province's Tourism Sector



# LTP Mandate

- Generic marketing
- Development and promotion of former LimDev resorts
- Development and promotion of tourism and hospitality services within provincial parks



# LTP Vision

For Limpopo to become the leading eco-tourism  
destination in Southern Africa



# Tourism Strategic Objectives (2006 – 2010)

- To grow international arrivals to 770 000
- To grow Domestic trips to 5,4 million
- To increase the average stay of domestic tourists by 0.5 day per annum
- To facilitate geographical spread of tourist from two to four regions and increase their spend to R1000.00 per day
- Facilitate the transformation of the tourism & wildlife industries

# Feedback on Meropa Declaration

- **LIMPOPO BRAND:** National has introduced a tourism brand which will be used by all provinces when marketing internationally.
- **INCREASE PROFILE OF THE PROVINCE:** Marketing Campaigns in the Domestic and International Markets. Trade Reps appointed.
- **COLLATE MARKET INTELLIGENCE:** Research sub-unit established and assisted by research institute and service providers.
- **CONDUCT BROADBASE TOURISM AWARENESS:** Regional roadshows done in conjunction with District Municipalities and through radio talk shows and print media.
- **COMMUNICATION AMONGST STAKEHOLDERS:** Forum established through various RTA that were established in different regions.
- **DEVELOP A CULTURE OF TRAVELLING:** Tourism Month Campaigns used to drive information about things to see and do in Limpopo

# 2005/6 Financial Year Activities



# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2005/6 FINANCIAL YEAR

- **Marketing Services**
  - **Domestic marketing**
    - Rolled out four promotional campaigns
    - Events sponsorship – Limpopo 4X4, Limpopo Golf Classic & Miss Limpopo Pergeant
    - Trade workshops – Dertour Travel Academy, Gauteng and Western Cape
    - Tourism shows – Rand Easter Show, Indaba Travel and Trade Show, Outdoor Shows(Kyalami & Cape Town), Polokwane Show, Mopane to Marula Show, Kremetart and Savanna Shopping Centre Exhibition



# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2005/6 FINANCIAL YEAR (con't)

- **Marketing Services**

- **International marketing**

- **Trade workshops – Japan, London and Scotland**
    - **Roadshows– Arbeitsgemeinschaft Sudliches und Ostliches Africa (ASA), India, and SADC Missions (Mozambique, Zimbabwe, Namibia, Botswana**
    - **Shows: World Travel Market, India Country Infamil Campaign, Nan Fei Total in China, International Tourism Exchange (ITB) in Germany**
    - **Trade and Media Familiarisation trips**



# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2005/6 FINANCIAL YEAR (con't)

- **Destination Development**

- **Assisted 71 SMMES through the Entrepreneurship Development and Promotion Strategy:**

- Participation in Indaba
- Training on pricing strategy
- Grading

- **Facilitated South African Tourism's Emerging Tourism Entrepreneur of the Year Award (ETEYA)**

# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2005/6 FINANCIAL YEAR (con't)

- **Information Provision and Dissemination**
  - **Disseminate information to the tourists and other stakeholders through the three regional offices:**
    - Makhado
    - Tzaneen
    - Bela Bela
  - **Activities of the regional offices:**
    - Stakeholder relations
    - Respond to enquiries
    - Distribution of marketing collateral



# 2006/7 Financial Year Activities



# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2006/7 FINANCIAL YEAR

- **Marketing Services**

- **International marketing**

- Expanded marketing efforts to: Netherlands, Belgium, Botswana , France, Malaysia, Namibia, Mozambique, Zimbabwe, Zambia,
    - Trade workshops – Japan, India, London and Scotland
    - Roadshows– Arbeitsgemeinschaft Sudliches und Ostliches Africa (ASA), India, and SADC Missions (Mozambique, Zimbabwe, Namibia, Botswana
    - Shows: World Travel Market, India Country Infamil Campaign, Nan Fei Total in China, International Tourism Exchange (ITB) in Germany
    - Trade and Media Familiarisation trips



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# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2006/7 FINANCIAL YEAR (con't)

- **Destination Development**

- **Assisted 93 SMMES through the Entrepreneurship Development and Promotion**

**Strategy:**

- Participation in Indaba
    - Training
    - Grading
  - **Facilitate South African Tourism's Emerging Tourism Entrepreneur of the Year Award (ETEYA)**
    - Mambedi Country Lodge became the National Winner



# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2006/7 FINANCIAL YEAR (con't)

- **Tourism Information Services**

- **Research & Statistics**

- Tourism Packages: Limpopo Province and SADC Countries
    - Events Impact Studies – Mapungubwe Arts Festivals and Marula Festival
    - Image and Perception Surveys – JHB Getaway Shows, Cape Outdoor Show, Botswana Travel Expo
    - Snapshot - Easter, Festive and Winter
    - Tourism Product Audit - establishment , beds and rooms
    - Visitor's Book Project



# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2006/7 FINANCIAL YEAR (con't)

- **Tourism Information Services**

- **Tourism Information Provision and Dissemination**

- **Compiled Information Offices Strategy**
- **Opened a regional office at Sekhukhune District Municipality & Polokwane International Airport**
- **Distribution of marketing and promotional materials – shows and exhibitions, tour operators, embassies, SAT country offices, provincial tourism c**
- **Maintenance of events calendar and website**



# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2006/7 FINANCIAL YEAR (con't)

- **Tourism Information Services**
  - **Tourism Safety and Customer Care**
    - Events support activities
    - Customer services strategy
    - Tourism Safety and Communication Plan



# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2007/8 FINANCIAL YEAR

- **Marketing Services**

- Domestic marketing

- Rolled out four promotional campaigns – Theme: “CELEBRATE LIFE”
    - Events sponsorship – Limpopo Soccer Challenge, Festival, 68<sup>th</sup> Annual IUCN Meeting Council, the ANC 52<sup>nd</sup> Annual Conference
    - Trade workshops – Dertour Travel Academy, Gauteng and Western Cape
    - Tourism shows – Rand Easter Show, Indaba Travel and Trade Show, Outdoor Shows(Kyalami & Cape Town), Polokwane Show, Mopane to Marula Show, Kremetart and Savanna Shopping Centre Exhibition



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- **Marketing Services**

- **International marketing**

- Trade workshops – Japan, India, London and Scotland
    - Roadshows– Arbeitsgemeinschaft Sudliches und Ostliches Africa (ASA), India, and SADC Missions (Mozambique, Zimbabwe, Namibia, Botswana)
    - Shows: World Travel Market, International Tourism Exchange (ITB) in Germany, Antwerp, Bolsa de Turismo de Maputo (BTM) in Mozambique, Ongwendiva Trade Fair in Namibia
    - Trade and Media Familiarisation trips – German Fundi, USA , UK, ProLimpopo, Hong Kong, Chinese Media, Nigeria
    - Tourism Marketing Strategy



# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2007/8 FINANCIAL YEAR (con't)

- **Destination Development**

- **Assisted 63 SMMES through the Entrepreneurship Development and Promotion**

**Strategy:**

- Participation in Indaba
  - Training
  - Grading
- **Facilitate South African Tourism's Emerging Tourism Entrepreneur of the Year Award (ETEYA) - Vuwa Transport became the 2<sup>nd</sup> Runner Ups**
  - **Limpopo Tourism Club**
  - **Tourism Product Support – Limpopo Zambesi Destination**



# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2007/8 FINANCIAL YEAR (con't)

- **Tourism Information Services**
  - **Research & Statistics**
    - Events Impact Studies –Marula Festival
    - Image and Perception Surveys – BTM in Mozambique, Cape Outdoor Show, Indaba, Ongwendiva Trade Fair, Namibia
    - Snapshot Surveys – Winter, Easter
    - Domestic Market Segmentation - Gauteng and Western Cape
    - Tourism Product Audit - establishment , beds and rooms
    - Visitor's Book Project



# 2007/8 financial Year Activities



# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2007/8 FINANCIAL YEAR (con't)

- **Tourism Information Services**
  - **Tourism Information Provision and Dissemination**
    - **Distribution of marketing and promotional materials – shows and exhibitions, tour operators, embassies, SAT country offices, provincial tourism offices**
    - **Maintenance of events calendar and website**



# LTP ACTIVITIES TO ACHIEVE THE STRATEGIC GOALS: 2007/8 FINANCIAL YEAR (con't)

- **Tourism Information Services**
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    - Events support activities
    - Customer services strategy
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# Limpopo's International Tourism Performance



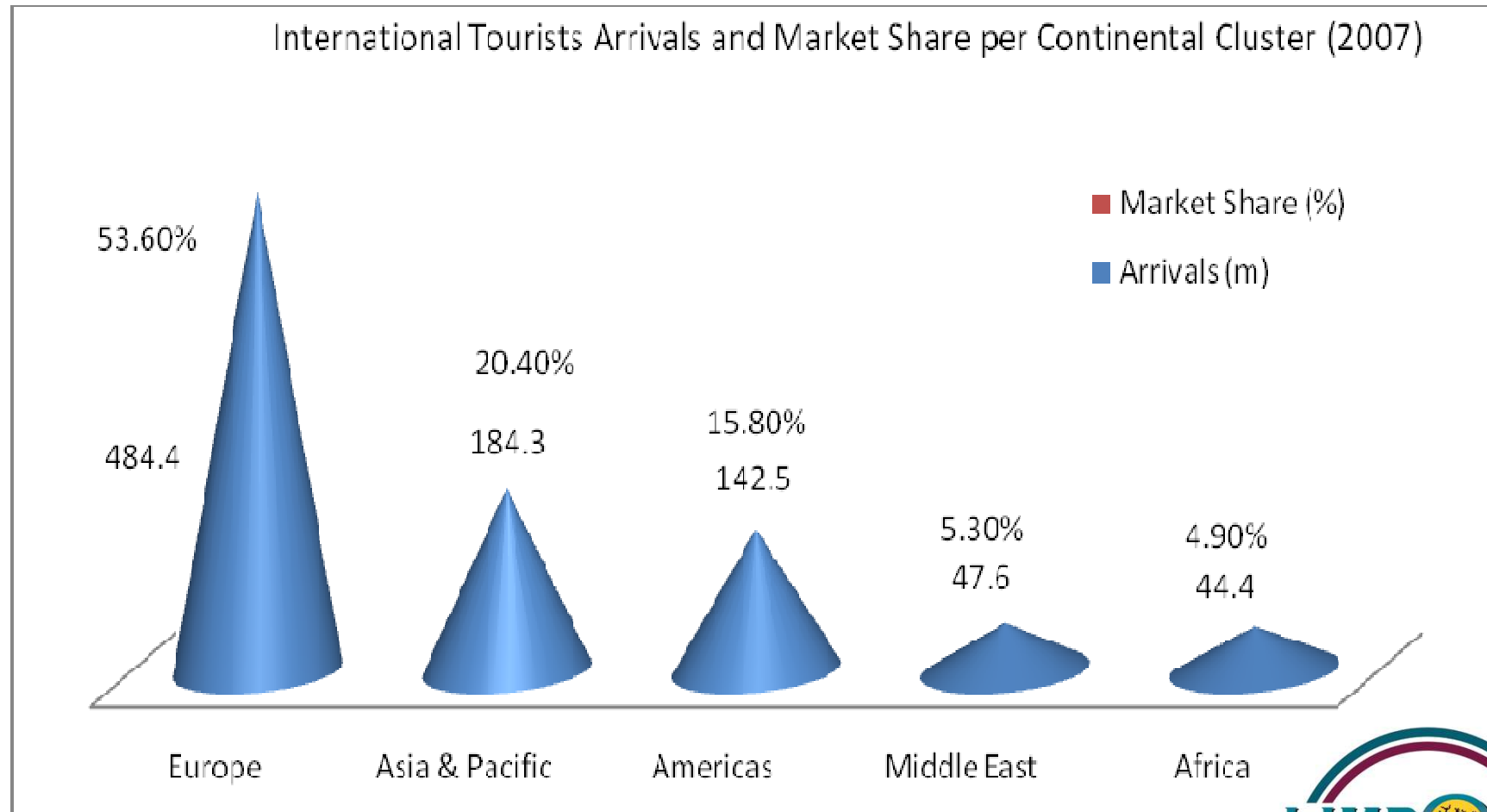
## International Tourists Arrivals (millions)

Period	Global		Africa		South Africa		Limpopo	
	Arrivals	% Growth Rate	Arrivals	% growth rate	Arrivals	% growth rate	Arrivals	% Growth rate
2006	846	5.4	63.4	7.7	8.4	13.9	0.655	26.9
2007	898	6.1	44.2	(30)	9.1	8.3	0.746	13.9
2008	924	1.3	46.9	0.06	9.6	5.5	0.672e	(0.09)e

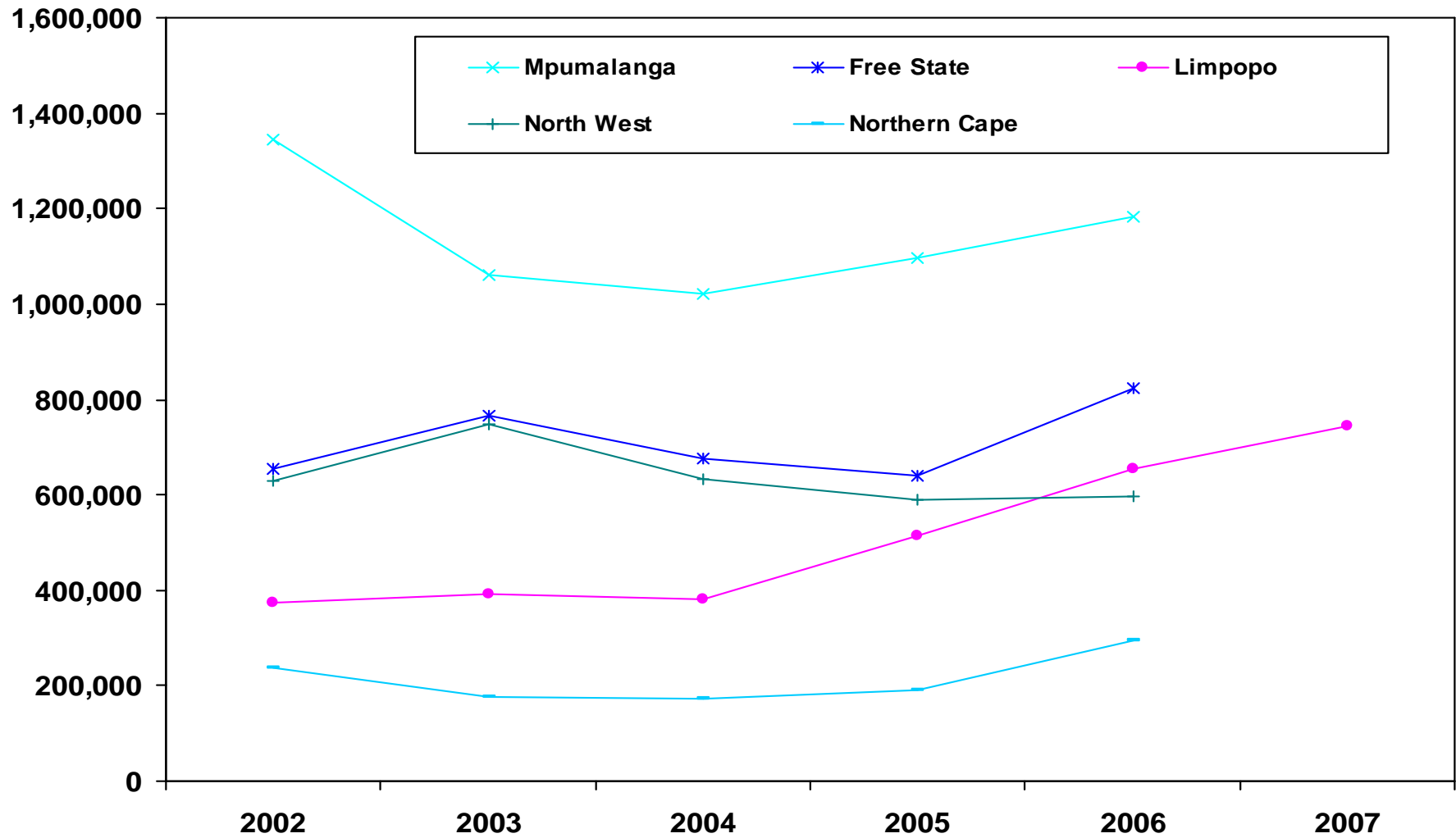
e = estimated @ 7%



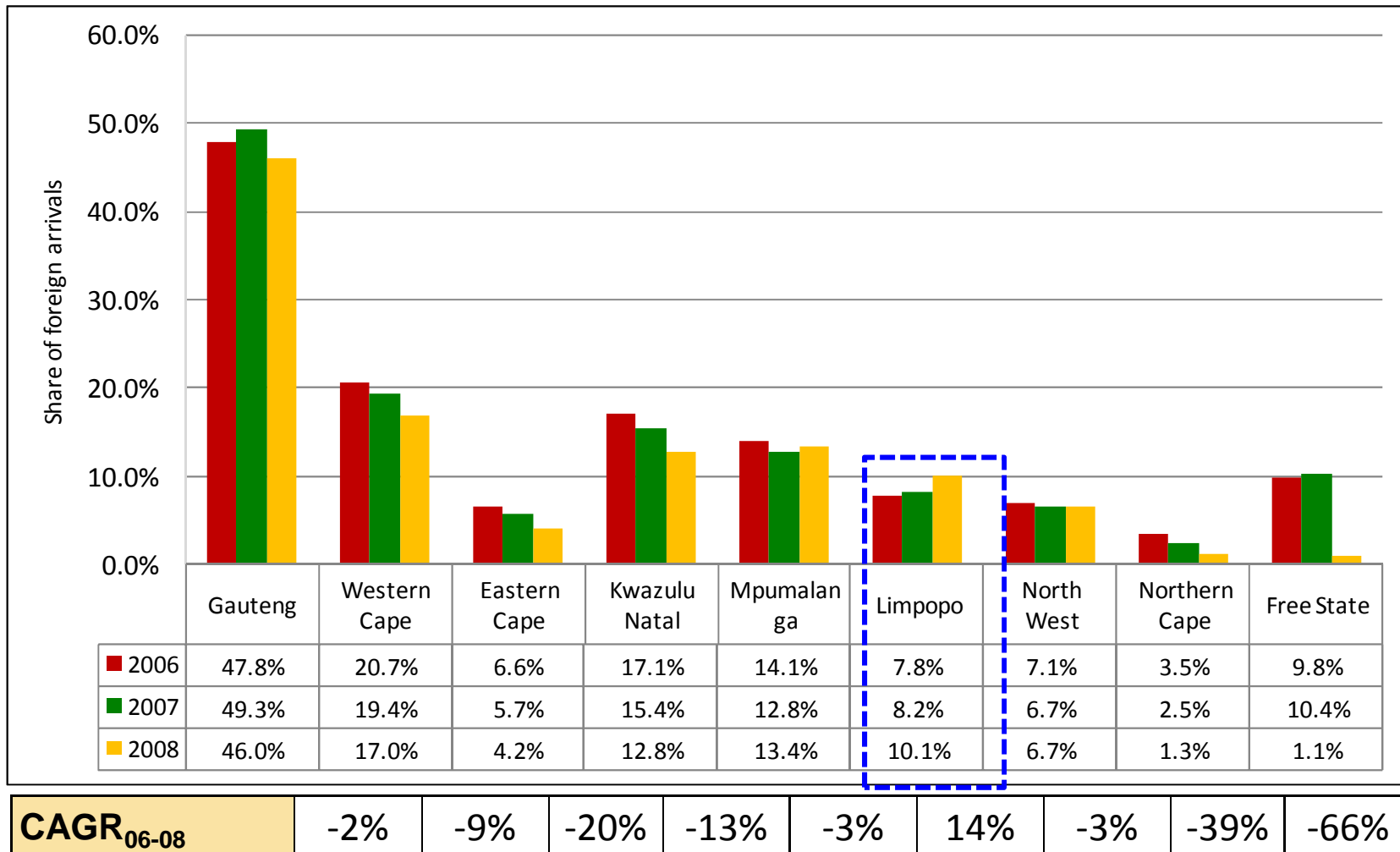
## International Tourist Arrivals and Market Share per continental cluster



# Provincial Distribution of International Tourists

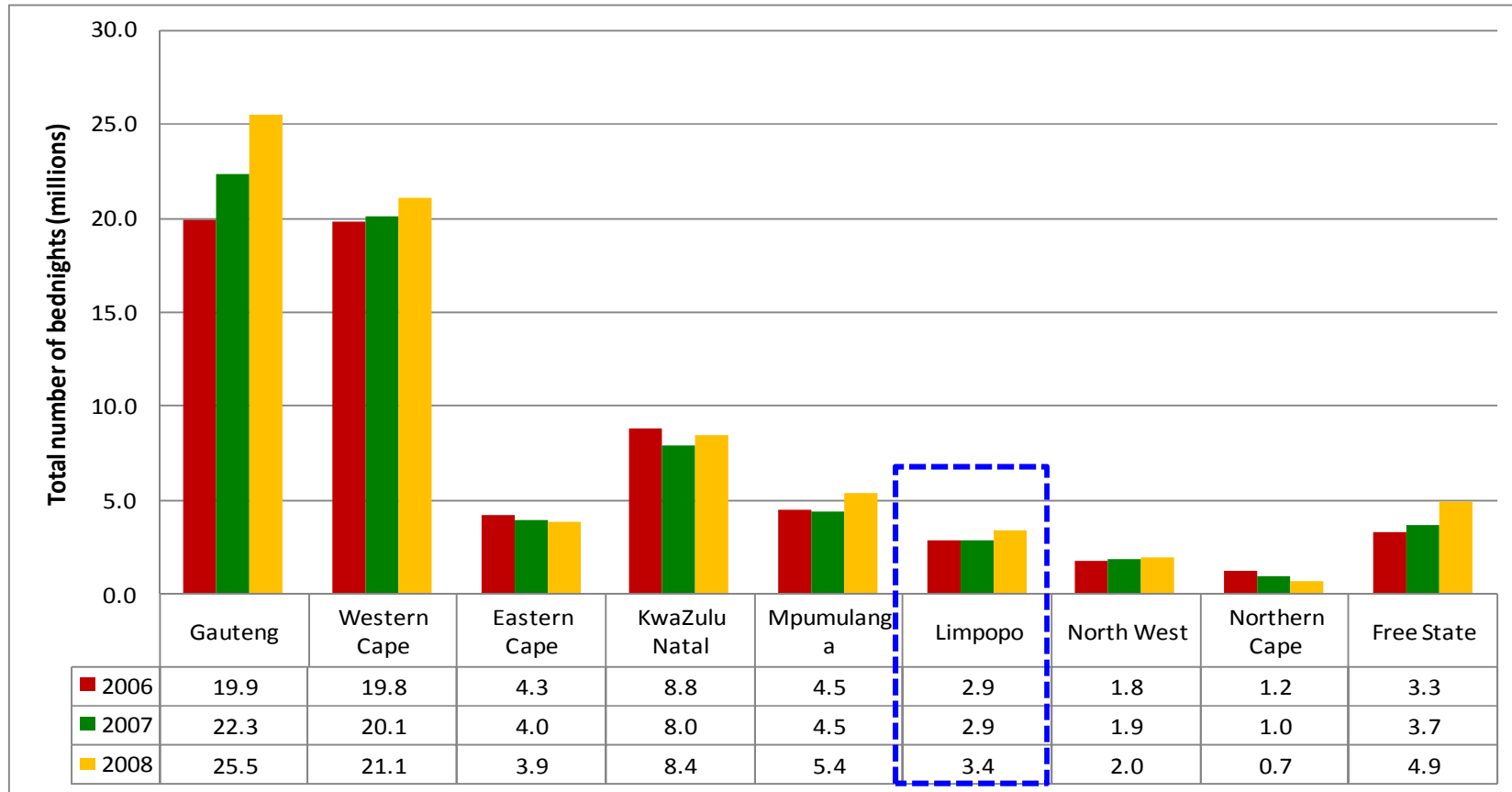


## Provincial distribution (Market share on visitors)



2. The number of foreign tourists who have visited Limpopo has increased to 10% in 2008. The province is the fifth most visited province.

## Provincial distribution (bednights)



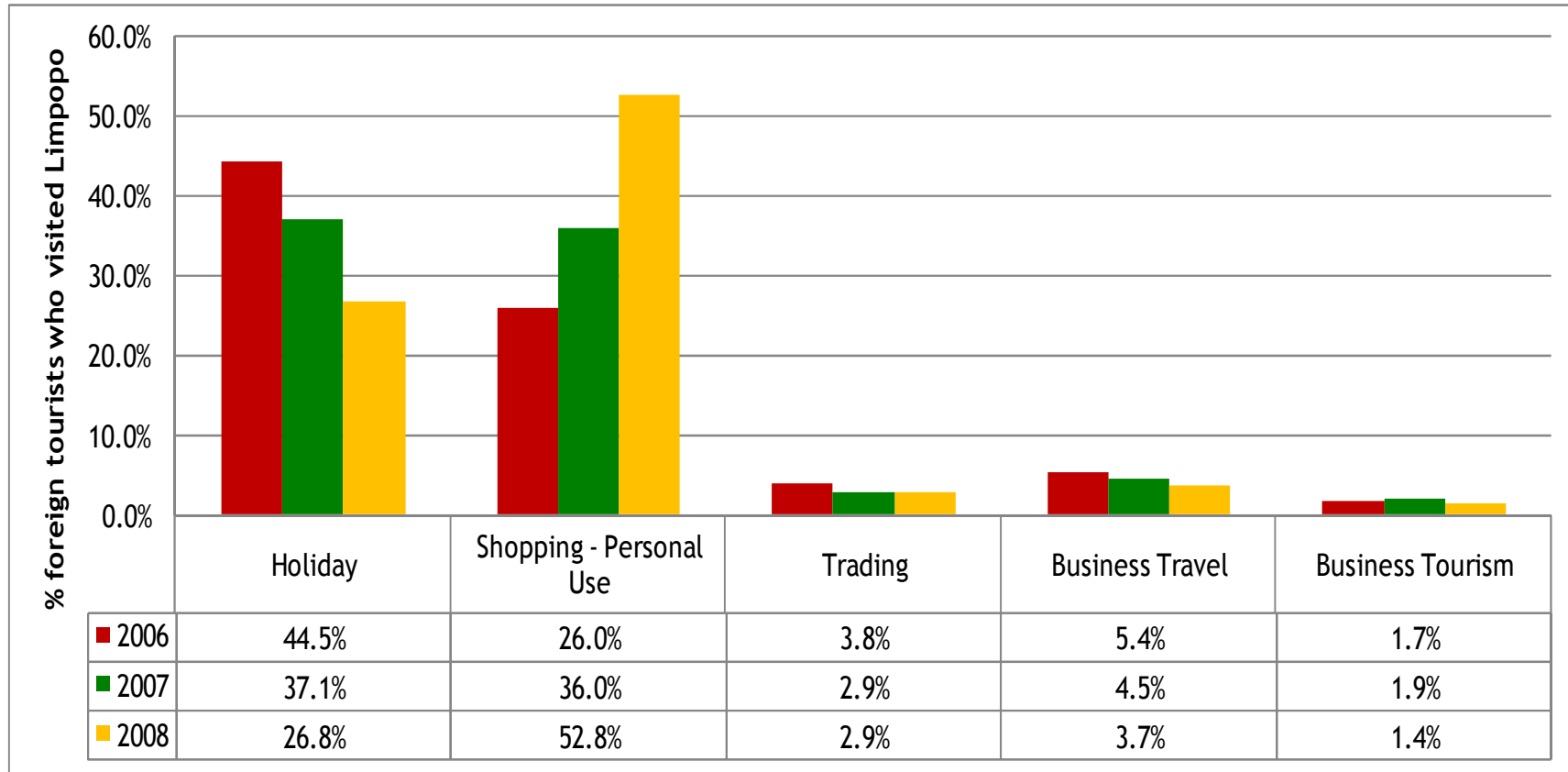
<b>CAGR<sub>06-08</sub></b>	13%	3%	-4%	-2%	10%	9%	6%	-25%	21%
<b>Share of bednights (2008)</b>	34%	28%	5%	11%	7%	5%	3%	1%	7%

The number of bednights spent in the province by foreign tourists increased by 9% between 2006 and 2008. In 2008, Limpopo accounted for 5% of all bednights spent by foreign tourists in South Africa.

## LIMPOPO'S KEY SOURCE MARKETS

Source Country	2002	2003		2004		2005		2006		2007
	Arrivals (000)	Arrivals (000)	Growth	Arrivals (000)	Growth	Arrivals (000)	Growth	Arrivals (000)	Growth	Arrivals (000)
Mozambique	15.8	9.3	(41.4)	7.8	(21.5)	23.8	205.1	27.5	15.5	24.9
Zambia	4.9	9.2	87.4	9.7	5.4	10.2	5.2	6.4	(37.2)	3.1
Zimbabwe	97.4	202	107.2	201.9	(0.05)	301.8	49.5	431.1	42.8	522.5
Canada	2.7	1.8	(33.1)	2.1	16.7	2.4	14.3	4.4	83.3	3.0
USA	18.2	15.4	(16.0)	19.1	24	14.0	(26.7)	15.3	9.3	20.2
Australia	4.9	5.0	2.6	3.6	(28.0)	4.6	27.8	3.6	(21.7)	5.2
France	8.9	7.9	(11.6)	5.5	(30.3)	6.3	14.5	6.4	1.6	3.9
Germany	17.3	15.9	(7.7)	15.2	(4.4)	17.5	15.1	18.1	3.4	11.9
Netherlands	13.2	12.7	(4.1)	12.7	-	12.8	0.8	18.7	46.1	19.1
UK	22.1	21.0	(5.2)	21.0	-	14.1	(32.5)	19.5	38.3	17.4

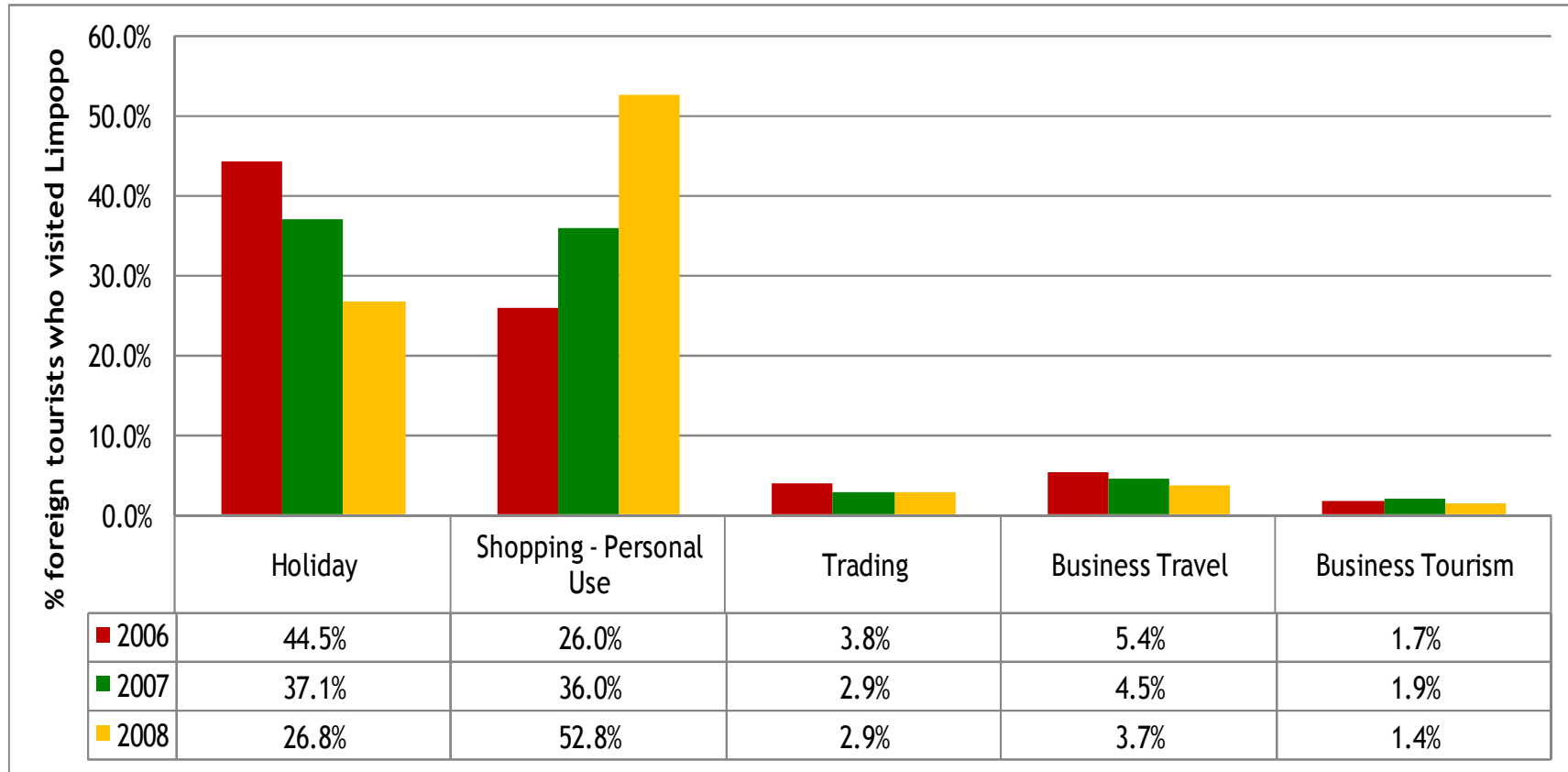
## Purpose of visit to Limpopo (International)



In 2006 and 2007, holiday was the major reason for foreign tourists visiting Limpopo. This dropped in 2008 while those visiting for the purposes of shopping for personal use increased.

Note: The sample sizes for medical, religious, and sports was too small for valid reporting

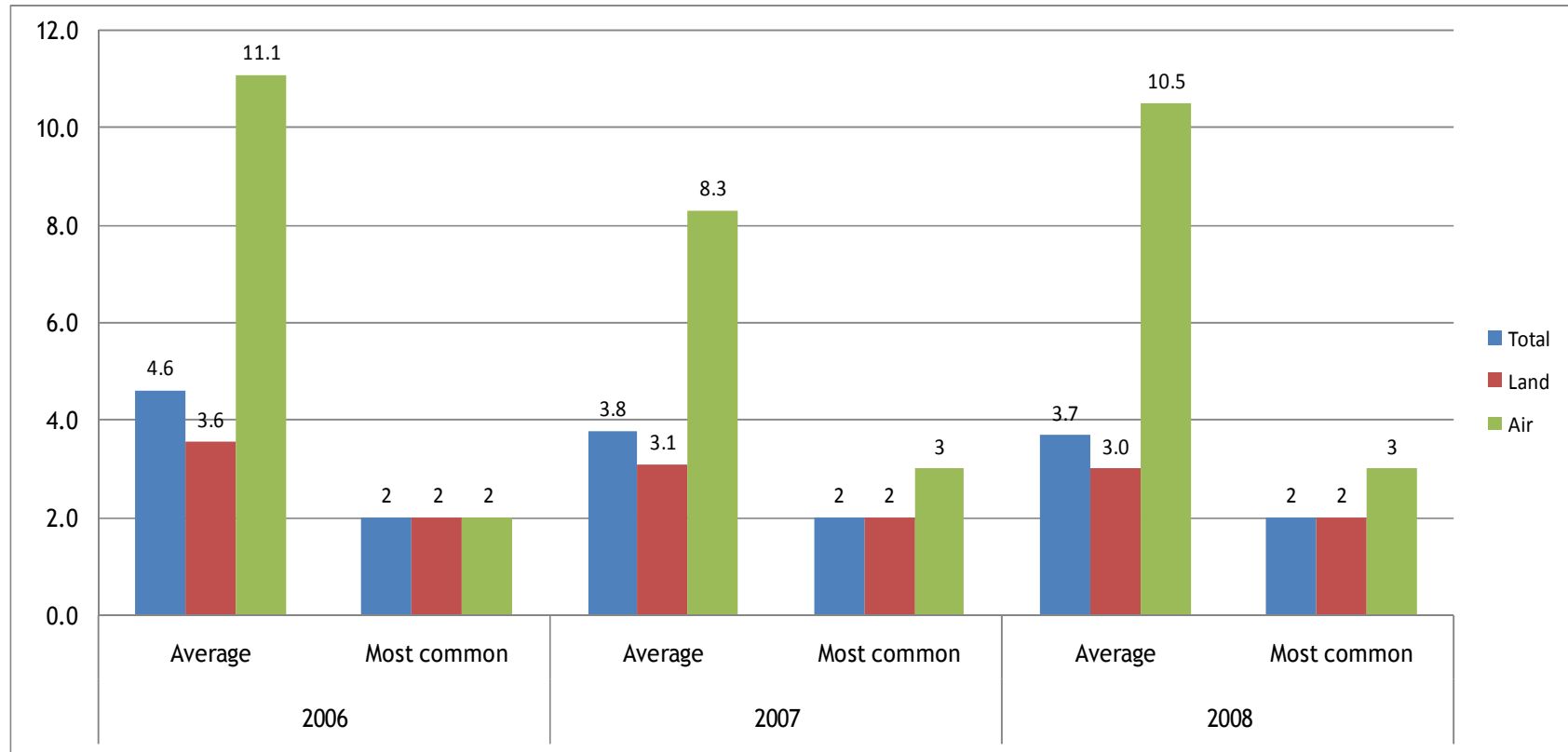
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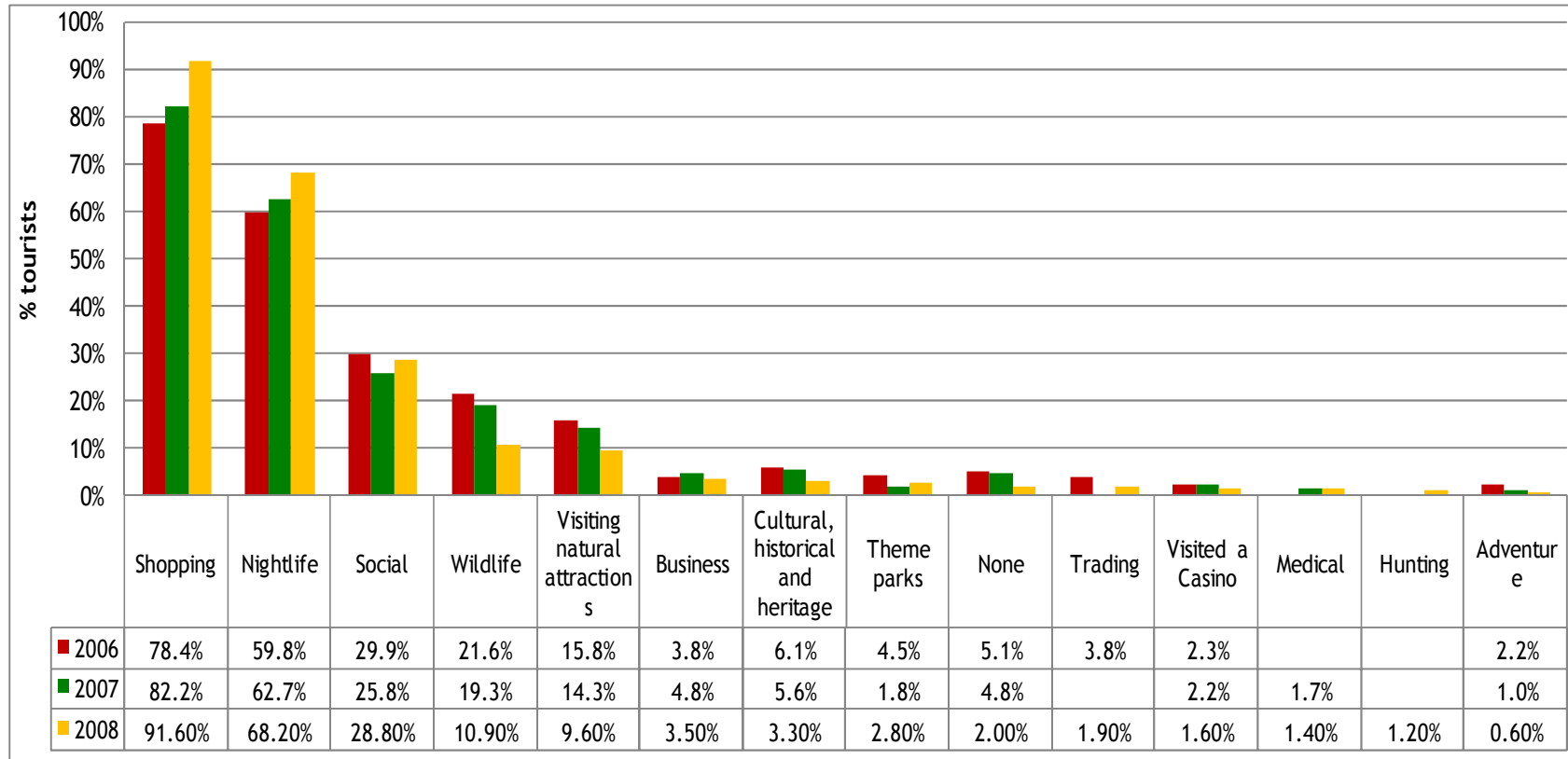
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## Length of stay in Limpopo



The average length of stay of foreign tourists in Limpopo is about 4 nights, while most foreign tourists tend to stay only 2 nights. Air tourists tend to stay longer in Limpopo compared to land tourists.

## Activities of foreign tourists to Limpopo

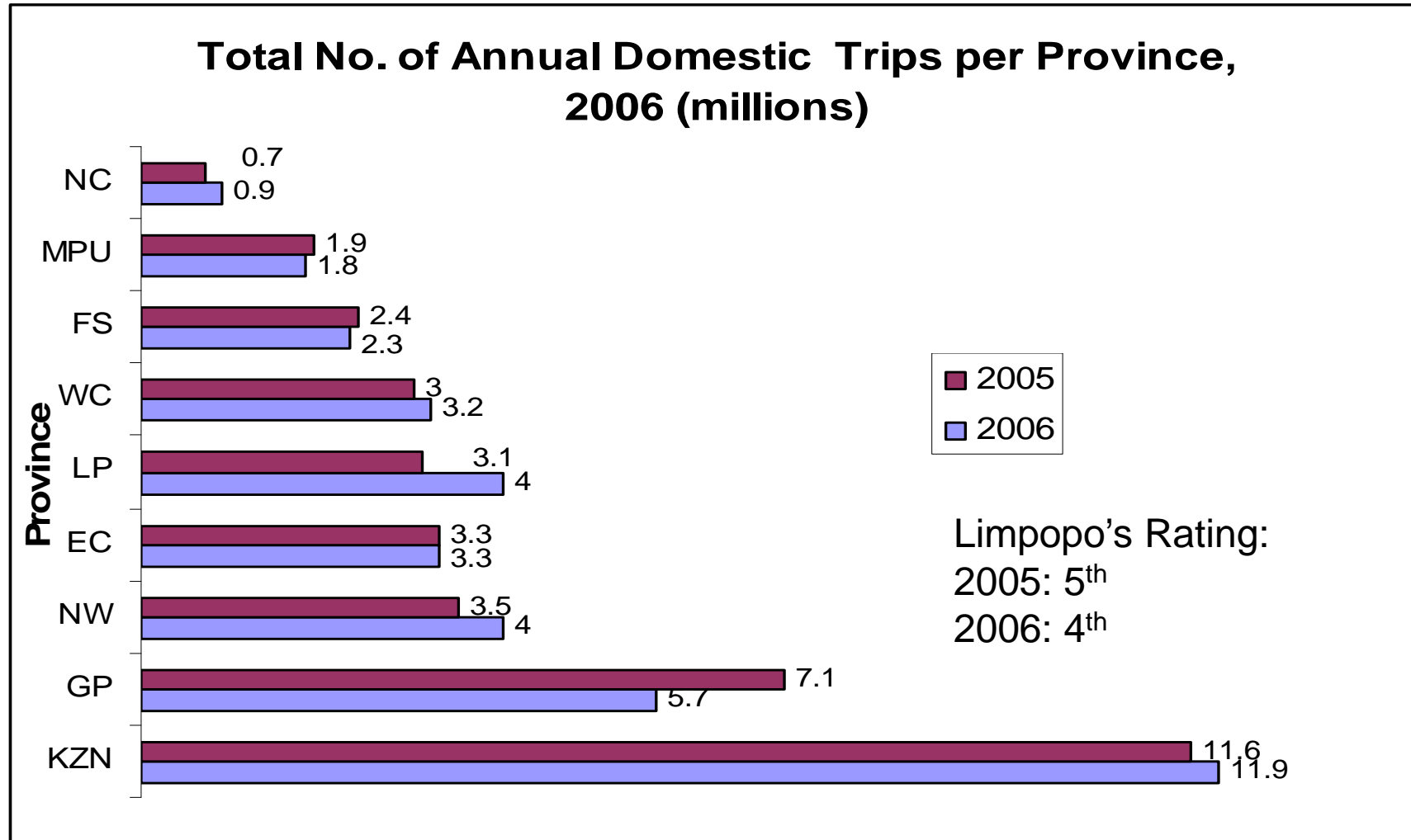


Apart from the usual tourist activities of shopping and nightlife, foreign tourists to Limpopo engage in social activities, wildlife and visit natural attractions.

# Limpopo's Domestic Tourism Performance

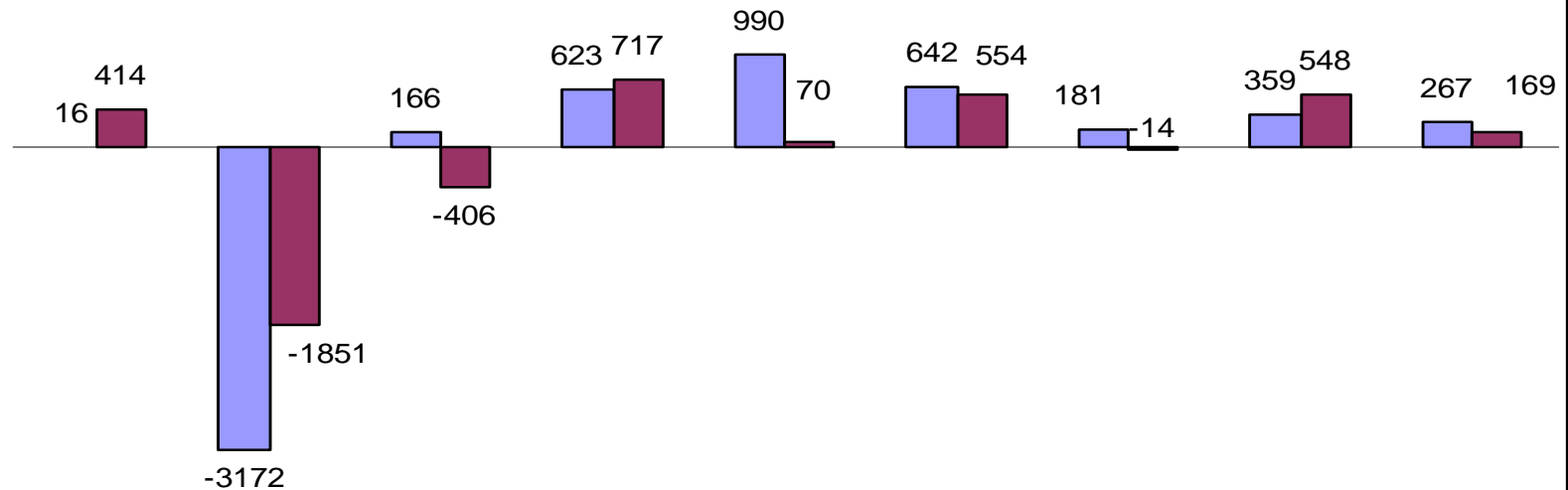


# Annual Domestic Trips Per Province



# Net inflow/ (outflow) of domestic trips per annum

**Net inflow (outflow) of domestic trips by Province, 2006 (000)**



	KZN	GP	NW	EC	LP	WC	FS	MPU	NC
2006	16	-3172	166	623	990	642	181	359	267
2005	414	-1851	-406	717	70	554	-14	548	169

# Limpopo Overview: Domestic Tourism Markets

## Source Markets:

- KwaZulu Natal, Gauteng, Western Cape, North West and Limpopo
- Limpopo ranked number five in total number of trips to the province.
  - In 2007, a total of 2.7 million arrivals accounting for 8% of the domestic arrivals in 2007 and 1.3 million inter-provincial (MM) and 1.4 intra-provincial (MM).
  - In 2008 the number declined to 2.4 million trips accounting 7%. 1.6 million inter-provincial (MM) and 0.8 intra provincial (MM).



# Limpopo Overview: Domestic Tourism Markets (Cont...)

- Revenue
- In 2007, R1.6m was spent into Limpopo with a net flow revenue of R468m
- In 2008, R2.2m was spent into Limpopo with a net flow revenue of R 652m



# Challenges and obstacles

- **Fragmented tourism industry**
- **Limited airlift capacity and higher airline costs**
- **Limited resources – financial and human resources**
- **Uncoordinated marketing efforts**
- **Availability and accessibility of industry statistics**
- **Underdeveloped tourists attractions**
- **Lack of tourism signage**



# Recommendations

- Industry support and participation in LTP activities