



South African Tourism

Programme Evaluation Report

June 2022

SA Tourism Programme Evaluation Report

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List of Abbreviations

BQV	Basic Quality Verification
COVID-19	Coronavirus pandemic
DDC	Deal Driven Campaign
DT	Department of Tourism
EICT	Excite, Innovate, Create, Transcend
MER	Minimum Entry Requirements
MoU	Memorandum of Understanding
NTSS	National Tourism Sector Strategy
SAPO	South African Product Owners
SA Tourism	South African Tourism
SMMEs	Small Micro and Medium Enterprises
TGCSA	Tourism Grading Council of South Africa
VTSDs	Villages, Towns and Small Dorpies

SECTION 1: INTRODUCTION

1.1 Background

South African Tourism (SA Tourism) undertook a process to develop and implement an Evaluation Framework for its programmes and projects. In line with the evaluation framework two projects have been identified for assessment. In this regard, the evaluation seeks to::

- Assess whether the identified programmes have successfully delivered their intended outcomes and impacts as reflected in the programme's plans.
- Determine the benefits that have been derived from the identified programmes and the link to the outcomes of SA Tourism.
- Provide recommendations that can be used during future planning to improve SA Tourism's programmes and projects.

The implementation of the evaluation framework should ultimately assist SA Tourism to:

- Strengthen its programme and project planning and execution;
- Improve accountability;
- Contribute to more effective decision-making; and
- Realise or maximise its intended impacts.

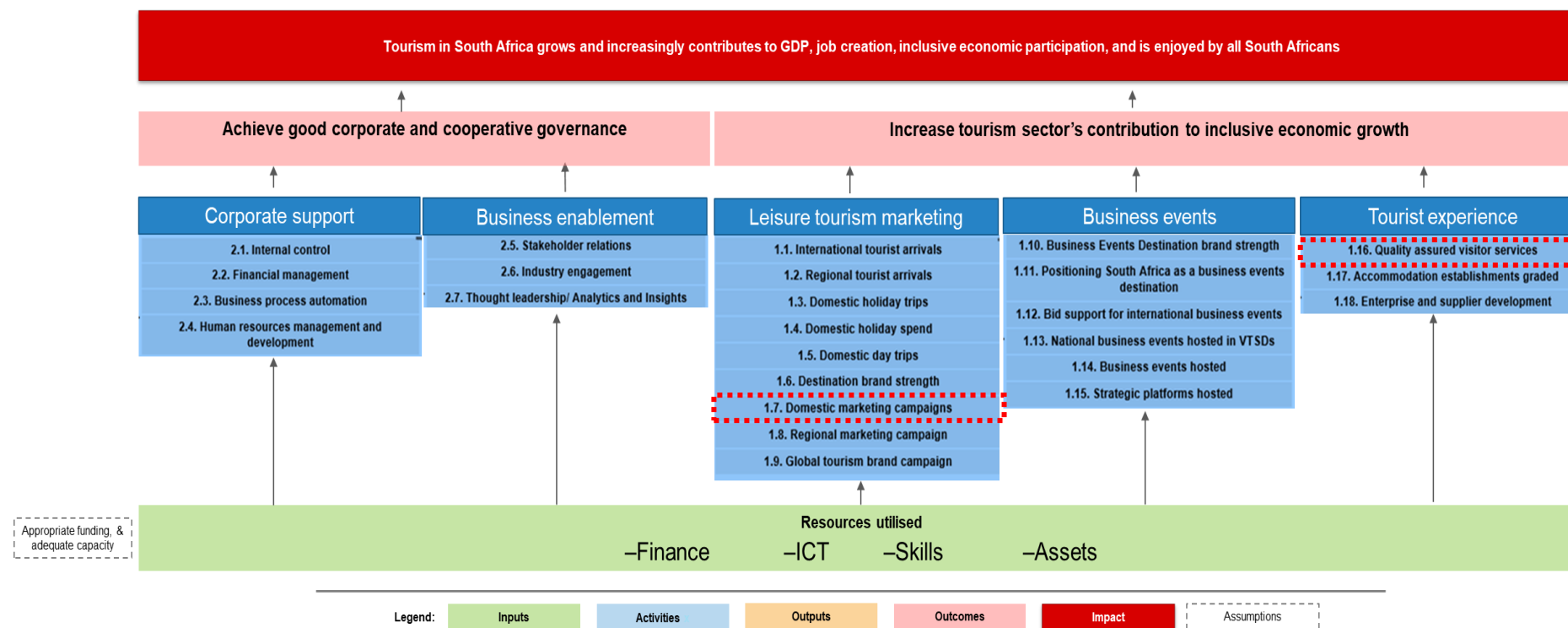
1.2 Purpose

This document presents the evaluation process and outcome of the two selected programmes for the first year of the implementation of the evaluation framework, i.e., the Basic Quality Verification (BQV) and Domestic Campaigns Programmes.

1.3 Programme Evaluation

Outlined below is the theory of change, based on the programmes overview (informed by the Annual Performance Plan for 2021/22 – 2022/23) and SA Tourism Results Based Plan, which will serve as a tool to guide the evaluation process of SA Tourism projects:

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The two programmes were strategically selected from a process that involved the following:

- A programme output priority matrix was used to identify the selected programmes outputs to be evaluated within a three-year period. The criteria used to rate these project outputs is unpacked below:
 - ✓ The matrix begins by assessing each project's target group to be impacted: Projects that focus on impacting traders or consumers get a higher rating of 2, compared to projects that merely play a support role at the organisation level (i.e., there are no beneficiaries to be impacted directly) that get a lower rating of 1.
 - ✓ The second component of the matrix assesses each project's impact on the tourism sector. A higher rating of 3 is awarded to projects that have a direct impact on their target audience within the tourism sector, while a rating of 2 is allocated to projects that have an indirect impact or are associated with another project that has a direct impact on consumers. Projects that provide a support role to the organisation or programmes get a lower rating of 1.
 - ✓ The last component of the matrix tracks the progress made on each project. The logic is that projects that have completed targets/sub-projects in the previous year obtain a higher rating of 4 and are ideally suited to be evaluated first. Other projects that are implemented annually get a rating of 3 as they may be evaluated upon their completion, within a short/medium period. Future-dated and ongoing projects only get rated between 1 and 2 as they may not be eligible to be evaluated immediately or in the next two financial years.
 - ✓ Upon completion of the rating exercise, the matrix provides a cumulative score for each project. Projects with the highest scores are considered to qualify to be selected for the evaluation.
- Based on the outcomes of the matrix, half of the top 6 projects (i.e. the first 3) were categorised as being consumer-based, while the remaining half as trader-based.
- It was then suggested that each evaluation period considers one project from each category. In other words, 1 consumer-based project and 1 trader-based project were suggested to be evaluated during each year of evaluation.

As per the evaluation period, the following two programme outputs will be evaluated during 2021/22:

- Domestic Campaigns conducted during 2021/22 - as according to the APP 2021/22, SA Tourism invested more time and resources into doing quarterly domestic campaigns during the hard lockdown periods of 2020-2021 to drive domestic tourism in an effort to restart/support the tourism sector.
- Basic Quality Verification Programme completed during 2021/22 - as according to the APP 2021/22, there was a once-off project with measurable impacts on selected tourism industry players.

1.4 Methodology

The data gathered in this report was sourced from both primary and secondary research methods as detailed below:

1.4.1 Evaluation

The evaluation of the two programmes, as per the evaluation framework, involved an outcome, economic and impact type evaluation. These evaluation types may be summarised as follows:

- Outcome – This evaluation type determined whether or not the intended benefits of the programmes were achieved by looking at the relevance and effectiveness of the programmes.
- Economic – This evaluation type determined whether the costs of the programmes were proportionate with the resultant benefits by assessing the efficiency of the programmes.
- Impact – This evaluation type determined the results of the programmes and the difference they made on the beneficiaries as well as the broader economy.

A summative evaluation approach was undertaken as the two selected programmes had reached the end of their intended cycles/timeframes and were completed in the previous years. This approach focussed on determining:

- Whether the programmes' objectives were met
- Whether the programmes needed to improve
- What the overall impact of the programmes were

1.4.2 Primary data collection

- BQV Programme
 - **Interview with the Project Manager**, who provided background and relevant (including secondary) information on the programme.
 - **A face-to-face interview session with 3 of the BQV Assessors** who were appointed for the pilot phase of the programme. An additional survey (completely remotely) was also completed and shared by 1 extra assessor, who sent the completed survey back to the research team via email.
 - **Interview with the service provider** (i.e. Excite, Innovate, Create, Transcend (EICT)) who was responsible for project management and related duties during the roll-out and implementation of the pilot phase of the programme.
- Domestic Campaigns Programme
 - **Interview with the Project Manager**, who provided background and relevant (including secondary) information on the programme.

1.4.3 Secondary data collection

Listed are the key documents that were used to extract important data relating to the programmes' performance:

BQV Programme

- Memorandum of Understanding (MoU) signed between SA Tourism and the Department of Tourism (DT).
- South African Tourism: Annual Performance Plan 2022/23

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- Close-out Report for the Basic Quality Verification Programme

Domestic Campaigns Programme

- South African Tourism: Annual Performance Plan 2022/23
- Tourism Execution: Divisional Operational Plan 2021/22
- Domestic Tourism Report – this report includes feedback on traders and consumer surveys conducted by SA Tourism between 2018 and 2021, which sought to gauge the impact of the programme on their businesses/overall visitor experiences.

1.4.4 Data limitations

The following challenges were encountered during data collection processes:

BQV Programme

- Only 4 out of 15 BQV Assessors were reached to provide insight into the programme's impact. This was due to having no access to the remaining BQV Assessors as they could not be reached during the data collection phase.
- There was a general lack of detail provided on the feedback gathered during all the engagements for the BQV Programme.

Domestic Campaigns Programme

- Survey invitations were sent out to traders that were involved in the Domestic Campaigns Programme, and none of these traders provided feedback.
- There were communication challenges with the Domestic Campaigns Project Manager.
- The research team could not gain access to financial resources used during the implementation of the Domestic Campaigns Programme. This made it difficult for the research team to determine whether the programme has had value for money or not.

SECTION 2: BASIC QUALITY VERIFICATION PROGRAMME EVALUATION

2.1 Programme overview

The BQV Programme was conceptualised around 2018, as an agreement between SA Tourism and DT to provide a structured development programme to enable tourism products (accommodation establishments) that do not meet minimum entry requirements (MER) of grading, to access trade with the support of the tourism sector and providing access to funding opportunities to develop their offering to meet MER for formal grading over time.

This project, which is endorsed as a National Programme, was designed to be implemented over a 2 year-period and supported at a provincial level. The outcome of the set 2 years duration is to prepare and guide beneficiaries to become ready and eligible to apply for full star grading assessment.

2.1.1 Key objectives

The pilot BQV Programme was officially launched on the 23rd and 24th of March 2021 in the Eastern Cape Province's Makana Local Municipality and Buffalo City Metropolitan Municipality. As part of this pilot programme, 288 Small Micro and Medium Enterprises (SMMEs) were identified and enrolled for development support for the 2 years.

The key objectives of this programme are:

- To provide linkages to the Enterprise Development programmes administered by DT to assist with funding opportunities.
- To provide linkages to the Service Excellence programmes administered by DT to provide service training and development to product owners and employees.
- To ensure alignment with the National Development Plan and the National Tourism Sector Strategy (NTSS).
- To create a lead pool for the Tourism Grading Council of South Africa (TGCSA) to increase membership in line with the objectives of the Tourism Grading Support Programme.
- The programme will act as a starting point for the formalisation of homestays in South Africa.
- Basic Quality Verifications could allow for youth employment. Graduates could be used to perform the verifications as the technical specialisation required to be an Accredited Assessor is not a requirement.

2.1.2 Support/assistance provided

Primary research revealed that the BQV Programme has proven to play a significant role in the overall improvement of the quality of service offered by accommodation establishments in Villages, Towns and Small Dorpies (VTSDs) in the Eastern Cape. The BQV Assessors have witnessed the following notable impacts/effects:

- Most targeted business owners are senior citizens who have limited information about business and marketing. The presence of the BQV Assessors has enabled them to be advised on ways to improve their businesses and has led to knowledge sharing where the BQV Assessors played the role of mentors and guides. In other words, the BQV Assessors have

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managed to point the business owners to specific areas of their businesses that are lacking and suggested ways that these pitfalls could be mitigated.

- In most cases, business owners were reported to demonstrate a willingness to implement the suggested changes to make their establishments better.

Considering that the BQV Assessors were absorbed from the VTSDs as unemployed graduates, the programme has played a significant role in creating temporary employment in the Eastern Cape province. Once appointed, the graduates gained new skills in quality verification as well as entrepreneurship training.

2.2 Relevance

2.2.1 Issues addressed

The primary issues that were addressed by the programme are the following:

- Lack of Transformation
- Poor linkages of businesses in VTSDs to the mainstream tourism economy.

Other issues that the programme successfully addressed are:

- Lack of knowledge of the TCGSA's grading requirements.
- Lack of marketing skills among SMME owners in VTSDs.
- Lack of basic business management skills.

2.2.2 Alignment to Government objectives

The BQV programme is aligned with the TGCSA's mandate and the following policy/legislative framework:

Table 1: Alignment to Government policies/objectives

Policy/other legislation	Relevant objectives
White Paper on the Development and Promotion of Tourism in South Africa, 1996.	<ul style="list-style-type: none"> • To optimise opportunities for SMMEs, specifically emerging entrepreneurs. • To facilitate balanced tourism development in South Africa. • To create a conducive tourism investment climate.
Tourism Act, 2014 (Act No. 3 of 2014)	<ul style="list-style-type: none"> • To provide for the development and promotion of sustainable tourism.
National Tourism Sector Strategy	<ul style="list-style-type: none"> • To increase the direct contribution of tourism to the economy through partnerships, research-based collaborative planning, and the implementation of agreed priority actions.

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2.2.3 Importance to the tourism sector

The programme proved to have the potential to improve SMMEs in VTSDs through coaching and capacity development. The programme's intentions were those that aligned with the understanding that quality is key to trust, transparency and repeat business.

The discontinuation of the programme, as is currently the case, could result in a drop in the businesses' operating standards. The failure of these businesses will compromise the local tourism sector as the improved businesses could have contributed positively to the growth of the tourism sector.

2.3 Effectiveness

2.3.1 Objectives achieved

As indicated earlier, the programme's target was to ensure that a total of 288 SMMEs are enrolled for development support and verification for 2 years. However, once implementation commenced, only a total of 185 SMMEs were enrolled and verified during year 1. This implies that the programme achieved its set target by 64% (see tabulated summary below).

Table 2: BQV Programme targets and achievements

Target area	Target	Actual performance	% Achieved
Verification assessments for year 1	288 properties	185 properties	64%

The 185 verified businesses were identified through stakeholder engagement processes. This exercise was carried out by the EICT, an external service provider who was appointed to act as a Project Manager for the BQV Programme.

2.3.2 Contribution to the tourism sector and economic growth

It is difficult to determine the programme's exact impact and contribution to the tourism sector as the pilot project was carried out during a time when COVID-19-related travel restrictions were imposed. This means that although some businesses appeared to be improving, their improved services could not be tested using tourist satisfaction services (or other similar techniques) as there were not many tourists visiting the targeted establishments during the period.

It is beneficial for accommodation establishments to get graded as it will greatly assist with promotion of the establishments. Graded establishments can open their doors to more visitors as people prefer to make use of graded accommodation. Grading involves benefits relating to procurement, recruitment, legal advice, access to information, training, and marketing. Destination management should encourage accommodation establishments to get graded and see where assistance can be provided with the grading process.

It is hereby recommended that this programme be continued into a second phase (additional 12 months or longer) to begin testing tourist satisfaction in verified establishments that have received customers after the first phase of the programme.

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2.4 Efficiency

2.4.1 Resources used

According to the MoU, signed between SA Tourism and DT during the inception phase of this project, the cost of introducing the BQV Programme was covered under the funding allocation for the Tourism Grading Support Programme. The allocated budget has been utilised to cater for costs that include:

- Cost of enhancing the existing TGCSA's operating system
- BQV Assessors' stipends
- Project management costs relating to securing an external service provider
- Working equipment: laptops with internet access, diaries, pens
- Training costs that are associated with the booking and use of venue and training equipment

The MoU presented the budget breakdown tabulated below.

Table 3: BQV Programme costing

Cost item	Cost allocation for year 1	Cost allocation for year 2
System enhancements.	R500 000	R -
Training course, venue, and equipment for contracted individuals.	R1 200 000	R -
Project management services.	R1 440 000	R1 584 000
Verification assessment.	R1 624 000 (±500 properties)	R1 950 000 (±600 properties)
Total	R4 764 000	R3 534 000

2.4.2 Resource efficiency

In the BQV Assessor's view, these financial resources were not sufficient as they experienced the following operational challenges:

- There were insufficient funding allocations, which left a 2-months wage deficit for the BQV Assessors.
- The programme was discontinued after the first 12 months which means that all its associated benefits were cut off from the beneficiaries.
- There were no fund allocations for transport to different accommodation establishments. This was challenging as some areas (especially remote areas) were difficult and costly to reach.
- The varying distances and transport challenges led to some BQV Assessors arriving late to their appointments.

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- The BQV Assessors were not supplied with uniforms and name tags – This made some business owners uneasy as people generally have a fear of scams.

The above-noted challenges have had a negative impact on the programme's overall efficiency. It is therefore recommended that SA Tourism revisits the budget allocated to the programme to cater for the following:

- Continuation of the programme into another 12 months period.
- BQV Assessors' uniform and name tags for ease of identification.
- Increase resources such as transport to be able to reach the rural areas

2.5 Impact

2.5.1 Intended impacts

Based on the assessor's observations and experiences with the business owners, the programme has somewhat achieved its intended objectives, thereby yielding the following intended impacts:

- A large number of ungraded accommodation establishments showed active participation in the programme.
- The BQV Assessors were able to enlighten the business owners about the importance of:
 - complying with COVID-19 laws and regulations,
 - improving their marketing tactics and advertising real offerings, whereas most seemed to sell tourists product packages of certain service offerings that are nonexistent.

By the end of the first 12 months of the pilot programme certain accommodation establishments were reported to have received certificates as proof that quality verification was completed.

2.5.2 Unintended impacts

The following unintended impacts were noted:

- Limiting the programme to 12 months, and not sticking to the envisaged duration of 24 months, is a loss for the businesses as they are now activated, and looking forward to the next phase of the project.
- The fact that the BQV Assessors could not be easily (visually) identified as they did not have a uniform or name tags led to resistance from several business owners who have trust issues. According to the BQV Assessors, such business owners generally seemed uncertain and uncomfortable about the credibility of the BQV Assessors. The lack of trust affected the business owners' concentration levels and their ability to engage optimally with the assessor.
- The lack of allocation of financial resources for transportation (or transport arrangements) led to the BQV Assessors' late arrivals at the establishments. This resulted in cancellations and postponements of several verification appointments.

2.6 Sustainability

The BQV Assessors believe that the programme's benefits and impacts will be sustained in the long term because most business owners showed a keen interest to learn from the initiative and implement the suggested changes. This implies that lessons learnt are likely to remain with business owners for a

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long period, especially when such changes prove to contribute significantly to their business operations. Thus, the upgrades of the accommodation establishments will unlock opportunities for them to improve on quality, and to apply for full star grading assessment with the TGCSA.

The following factors will have an impact on the long-term sustainability of the programme's impact and benefits:

- Considering that most accommodation business owners are senior citizens, it will benefit the businesses that the owners pass on the key lessons and guidance derived from the programme onto their staff.
- It is important that business owners adhere to the requirements of BQV Programme.

2.7 Overall impact

Based on the information presented in this section under each theme and taking into consideration all the programme's benefits and pitfalls, the overall impact can be described as follows:

- **Relevance:** The BQV Programme is very relevant as it has proven to address multiple issues facing SMMEs in the accommodation sector, especially in VTSDs. The programme has also demonstrated alignment with some key Government objectives and the fact that it is an important initiative for the tourism sector.
- **Effectiveness:** The BQV Programme was not rolled out over 2 years as initially planned, and only partially achieved its target by verifying only 185 businesses instead of the initially planned 288. Thus, the programme's effectiveness was not fully achieved.
- **Efficiency:** The BQV Programme was reported to have severe funding shortages despite assertions of the MoU (signed between SA Tourism and DT) stating that the Department has transferred money to SA Tourism to fulfil the objectives of the programme. This affected the overall efficiency of the programme and needs more careful planning should this programme continue in the future.
- **Sustainability:** Despite the many challenges that the BQV Programme encountered, the BQV Assessors believe that the programme's benefits and impacts will be sustained in the long term.
- **Impacts:** The BQV programme managed to contribute to the transformation of the SMMEs within the first 12 months. However, the programme also rose some unintended impacts linked to funding challenges.

Overall, the BQV Programme did have some sort of positive impact on accommodation establishments and the tourism sector. This demonstrates that the programme should continue as it will improve the quality of South Africa's accommodation offerings and in return generate more income, create more jobs and grow the economy.

SECTION 3: DOMESTIC CAMPAIGNS PROGRAMME EVALUATION

3.1 Programme overview

The Domestic Campaigns Programme is summarised below:

Table 4: Domestic Campaigns programme summary

Campaign	<i>It's your country. Enjoy it!</i> <i>Because Nothing's More Fun than a Sho't Left</i> <i>#TravelWiseMzansi</i>			
Projects	February Deal Driven Campaign (DDC)	Easter DDC	Winter DDC	Sho't Left Travel Week
Summary	A campaign that promotes the month of love by showcasing day trips that couples can enjoy, ideally outdoors.	A campaign that promotes group travel for the Easter period.	A campaign that promotes the travelling during the Winter season by showcasing overnight and day trips that South Africans can enjoy in their country.	The Big South African Sale – this campaign provides South Africans with up to 50% off travel when booking during Travel Week.
Timeframe	8 February 2021 – 14 February 2021	21 February – 31 March 2021 (extended to Easter weekend)	18 June – 31 July 2021	8 August – 12 September 2021

3.1.1 Key objectives

The programme is anchored on the following key objectives:

Primary Objectives

- Inspire our segments to “get out of the house” to take more day and holiday trips now by showcasing a variety of affordable, desired experiences in a clear and accessible manner that is underlined by the message of personal safety (COVID-19 safety protocols).
- Encourage and engage the distribution channel to offer, promote and sell domestic deals to resuscitate domestic travel interest and put the tourism industry on the trajectory to recovery.

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Secondary Objective

- Use those participating distribution partners as a testimony for South African Product Owners (SAPO) that the domestic is a viable market, so that we can address the affordability barrier and SAPO not considering domestic as a profitable market.
- Building the digital tools and content.
- Provide market access to SMMEs and VTSDs experiences.

3.1.2 Support/assistance provided

The Domestic Campaigns Programme is geared towards making significant contributions towards growing the total number of domestic tourism trips in South Africa. The programme supports both the tourists and tourism businesses in the following ways:

- Tourism businesses are given the advantage to load and thereby advertise their product and service offerings on SA Tourism's Sho't Left website.
- The Sho't Left website thus assists tourism businesses by giving them exposure and related marketing benefits.
- This integrated site (i.e. Sho't Left website) allows tourists to gain access to different tourism products and service offerings across the country.

3.1.3 Project's intended impact

The Domestic Campaigns Programme is one of SA Tourism's strategies to improve South Africa's brand strength. To achieve this, SA Tourism relies on several tactical deal-driven campaigns through partnership distribution channels. The deals are focused on significant dates and themes targeting the following:

- Easter breaks
- Other religious holidays
- Winter school holidays
- Tourism Month /Spring holidays
- Summer holidays

The primary goal is to showcase the country's diverse offerings and encourage South Africans to travel in the country as much as possible.

3.2 Relevance

3.2.1 Issues addressed

Tabulated below are some of the issues that were addressed by the programme for traders and consumers. The information presented below was derived from SA Tourism's trader and consumer surveys, between 2018 and 2021.

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Table 5: Issues addressed by the Domestic Campaigns Programme

Traders	Consumers
<ul style="list-style-type: none"> SMMEs, especially in VTSDs, generally have poor marketing tactics and exposure, thereby making it difficult for tourists to recognise them. SMMEs also lack a marketing budget and resources. SMMEs operating in the accommodations sector generally struggle with a low room occupancy. 	<ul style="list-style-type: none"> Most domestic tourists lack interest in travelling locally. Domestic tourists generally lack awareness of the presence of diverse tourism products and services, especially the ones situated in VTSDs. Some domestic tourists lack awareness of SA Tourism as a brand, along with its programmes and offerings.

3.2.2 Alignment to Government objectives

The Domestic Campaigns Programme is aligned to the following policy/legislative framework.

Table 6: Alignment to Government policies/objectives

Policy/other legislation	Relevant objectives
White Paper on the Development and Promotion of Tourism in South Africa, 1996.	<ul style="list-style-type: none"> To establish tourism as a national priority. To promote domestic tourism amongst all South Africans. To optimise opportunities for SMMEs, specifically emerging entrepreneurs.
Tourism Act, 2014 (Act No. 3 of 2014)	<ul style="list-style-type: none"> To provide for the development and promotion of sustainable tourism.
National Tourism Sector Strategy (NTSS)	<ul style="list-style-type: none"> To increase the direct contribution of tourism to the economy through partnerships, research-based collaborative planning, and the implementation of agreed priority actions.

3.2.3 Importance to tourism sector

Tabulated below are some of the issues that were addressed by the Domestic Campaigns Programme for traders and consumers. The information presented below was also derived from SA Tourism's trader and consumer surveys conducted between 2018 and 2021.

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Table 7: Relevance of the Domestic Campaigns Programme to the tourism sector for traders and consumers

Traders	Consumers
<p>The programme, through the Sho't Left website, has afforded SMMEs the following benefits:</p> <ul style="list-style-type: none"> • Free marketing and business recognition by a wide pool of tourists. • Increased number of enquiries on the businesses by tourists as they see the SMMEs' offerings on the website. Although not all of such inquiries have resulted in a sale, the businesses seemed to appreciate the exposure, which brings hope for the future. • The integrated website allows the SMMEs to view each other's packages and offerings, thereby encouraging positive competition that is needed for businesses to grow. • Small businesses in the accommodation sector have reported increases in room occupancy after loading deals onto the Sho't Left website. 	<ul style="list-style-type: none"> • Consumers generally found the social media advertisements exciting, as they introduced them to different destinations and offerings in South Africa. • Some acknowledged that the advertised content enabled them to familiarise themselves with different tourism products and service offerings before visiting certain destinations. This made planning for travel easier.

The programme seems to have addressed some of the key issues/needs experienced by traders such as a lack of marketing strategies, budgets, and resources. The programme also addressed consumer related issues including a lack of awareness of, and interest in, local tourism opportunities.

The programme contributed to government's tourism objectives by prioritising tourism in the country, promoting domestic tourism, and improving tourism SMMEs' opportunities. Overall, the programme was seen as important to the tourism sector due to the benefits it provided to small business traders (such as improved marketing, exposure, and access to tourists) as well as the benefits experienced by consumers (such as improved knowledge of, and participation in, local tourism opportunities).

3.3 Effectiveness

3.3.1 Objectives achieved

SA Tourism successfully implemented all 4 of its planned seasonal campaigns, achieving a total of 2 783 472 domestic digital engagements.

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Table 8: Domestic Campaigns Programme targets and achievements for 2021/22

Target area	Target	Actual performance	% Achieved
Number of domestic deal-driven campaigns implemented	4 Seasonal themed campaigns	4 domestic deal-driven campaigns	100%

3.3.2 Contribution to the tourism sector and economic growth

Marketing plays a key role in raising awareness for tourism destinations, experiences and attractions. By implementing a number of domestic tourism campaigns, reaching a significant number of tourists, completing a large number of engagements, and providing support to small businesses in the sector, the programme achieved its objectives. It was able to contribute to the tourism sector's economic activity and growth by enabling more tourist activity and improving SMMEs' business and revenue. Thus, the continuous use of metrics (insights, clicks, etc.) is recommended to ensure adequate audience reach and brand awareness which in return will ensure optimal performance and contributing towards the country's tourism goals and economic growth.

3.4 Efficiency

3.4.1 Resources used

The following resources were utilised to turn the Domestic Campaigns Programme into a reality.

Table 9: Resources used per sub-programme

Valentines DDC	Easter DDC	Winter DDC	Sho't Left Travel Week
<ul style="list-style-type: none"> 13 Commercial Radio Stations Sho't Left website Social Media Waze 	<ul style="list-style-type: none"> 1 TV channel 14 Commercial Radio Stations 4+ partnerships (Nissan, Shell, Universal Music, Travelstart) 580 Pieces of Branded Sho't Left Content Waze 	<ul style="list-style-type: none"> 10 Commercial Radio Stations Social media Waze Local newspapers Sho't Left website 	<ul style="list-style-type: none"> Sho't Left website Social media OOH outside airports Street pole adverts nationally Airport TV TV including Espresso Waze 12 Commercial Radio Stations 3 Community Radio Stations

As stated earlier, there is very limited information relating to the financial resources used to implement the programme. This makes it difficult for the research team to determine whether the programme has had some value for money or not.

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3.5 Impact

3.5.1 Intended impacts

- The programme has some long-term benefits, as some traders indicated that they still get enquiries and bookings even after the Sho't Left Travel Week.
- Start-up business owners acknowledge that Sho't Left's backing adds value to their marketing and scores the consumers' trust.

3.5.2 Unintended impacts

- There were notable complaints from some traders and consumers who seemed to have difficulties with the Sho't Left website.
- Nearly all the consumers who did not visit the Sho't Left website indicated that they did not know about it. This implies that more work needs to be done to raise more awareness about the Domestic Campaigns Programme, to draw more people's attention to the Sho't Left website and its offerings.
- Some consumers who were aware of the online campaign were scared to follow its leads due to the fear of scams.
- Several consumers indicated that they saw the campaign's advertisements but forgot to check out the Sho't Left website. This could mean that the content advertised was not too appealing to some domestic tourists.

3.6 Sustainability

Considering that SA Tourism is demonstrating an active role in implementing the Domestic Campaigns Programme, and the fact that its key partners are fully backing the programme, its sustainability is almost certain, provided that the current pace is maintained or improved.

The programme has also received some positive feedback from some SMMEs in VTSDs who have testified that consumers still make inquiries and bookings even after the programme duration. This demonstrates that the programme is beneficial, and if continued it stands an opportunity to have long-term impacts across the tourism sector. Overall impact

Based on the information presented in this section under each theme and taking into consideration all the programme's benefits and pitfalls, the overall impact can be described as follows:

- **Relevance:** The Domestic Campaigns Programme has addresses some of the multiple issues facing SMMEs, especially in VTSDs, as well as some that affect domestic tourists. The programme has also demonstrated alignment with some key Government objectives and the fact that it is an important initiative to the tourism sector.
- **Effectiveness:** The programme has met nearly all its targets as set by SA Tourism as it was shown under Section 3.3. However, this programme failed to reach its target of 120 million consumers in the previous financial year.
- **Efficiency:** Although the programme utilised different resources to ensure efficiency, it is difficult to gauge the level of efficiency as there is limited information relating to the value of money derived from the implementation of the sub-programmes. However, the programme's cost efficiency in this regard could be calculated once the relevant data is made available.

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- **Sustainability:** Based on the pace and dedication at which SA Tourism is implementing the Domestic Campaigns Programme, along with the response from the key partners and traders, it is safe to assume that the programme may be sustained into the long-term future.
- **Impacts:** There remains a lot of work to be done to ensure that the programme achieved its intended impacts. However, the trader and consumer surveys revealed that currently, the programme's unintended impacts outweigh the intended impacts.

Overall, the Domestic Campaigns Programme has achieved a moderate impact during the past year. Although there are some multiple pitfalls to be addressed, the programme has had a positive impact on its target audience, and continues to drive domestic tourism in the country.

SECTION 4: RECOMMENDATIONS AND CONCLUSION

4.1 Recommendations

Tabulated below is a summary of the recommendations for the BQV and Domestic Campaigns Programmes.

Table 10: Recommendations

BQV Programme	Domestic Campaigns Programme
<ul style="list-style-type: none"> It is crucial for the programme to be continued into a further 12 months to cover the initially planned 24-month cycle. SA Tourism needs to emphasise the importance of grading along with all the added benefits, Especially in rural areas. SA Tourism needs to revisit the budget allocated into the programme, to ensure that it is increased and utilised in the most efficient manner. It is recommended that the suggested budget reallocations be stretched to cater for: <ul style="list-style-type: none"> the BQV Assessors' transportation fees (especially to businesses in remote areas); the BQV Assessors' uniform and name tags for ease of identification. 	<ul style="list-style-type: none"> The difficulties captured by both the trader and consumer survey need to be attended to as a matter of urgency to ensure that the Sho't Left website is improved for ease of use and navigation. More marketing efforts need to be implemented to ensure that the consumer reach is increased. This may be implemented by raising more awareness of SA Tourism as a brand as well as the Domestic Campaigns Programme along with its offerings and benefits to both traders and consumers. Marketing skills transference to the tourism sector can address the lack of marketing skills especially in rural areas

4.2 Conclusion

In conclusion, the impact assessment presented in this report was derived from available information gathered from both primary and secondary research methods. However, it is difficult to ignore the fact that major data gaps also exist, thereby affecting the quality of the results presented. The data gaps exist due to communication challenges with the Project Managers and the inability to reach out to the remaining 11 QBV Assessors.

It is therefore recommended that the key role players in all programmes/projects avail themselves in the future to partake in the data collection. This will assist with gathering as much information as possible about the performance of a programme/project and will improve the impact assessment processes which will contribute towards defining better recommendations for the programmes/projects going into the future.

Despite data gaps and other encountered pitfalls, both the BQV and Domestic Campaigns Programmes achieved a moderate impact during the past year. This is not a symbol of failure from SA Tourism's

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side, but more of an indication that although there has been notable progress documented, there is still room for improvement. SA Tourism is therefore advised to continue with both the programmes and implement the above-noted recommendations as far as possible. Ultimately, both the programmes' performance and impact will improve over time.

SECTION 5: LIST OF REFERENCES

- Closeout Report for the Basic Quality Verification Programme
- Memorandum of Understanding signed between SA Tourism and the Department of Tourism.
- SA Tourism (2021). *Annual Performance Plan for Financial Year 2021/22*. Johannesburg: South African Tourism. Johannesburg.
- SA Tourism (2021). *South African National Convention Bureau Divisional Annual Operational Plan 2021/2022*. Johannesburg: South African Tourism. Johannesburg.
- SA Tourism (2021). *Visitor Experience Divisional Annual Operational Plan 2021/2022*. Johannesburg: South African Tourism. Johannesburg.
- SA Tourism (2022). *Annual Performance Plan for Financial Year 2022/23*. Johannesburg: South African Tourism. Johannesburg.

SECTION 6: ANNEXURES

Annexure A: SA Tourism Evaluation BQV Questionnaire for Evaluators

SA TOURISM EVALUATION QUESTIONNAIRE

Dear Respondent,

South African Tourism (SA Tourism) has appointed Urban-Econ Development Economists, along with Nikela: Urban-Econ, to develop and implement the SA Tourism Programme Evaluation Framework for selected programmes.

The primary objective of the study is to assist SA Tourism to:

- strengthen its programme and programme planning and execution;
- improve accountability;
- contribute to more effective decision-making; and
- realise or maximize its intended impacts.

A critical part of the study is to actively engage with all the interested and affected parties of the selected programmes, which include the stakeholders that are either directly or indirectly linked to the programmes.

This questionnaire aims to obtain the following information from key stakeholders of the selected programmes:

- Whether the programmes have successfully delivered on their intended outcomes and impacts as reflected in SA Tourism's programme plans.
- Determine the benefits that have been derived from the selected programmes and the link to the outcomes of SA Tourism.
- Issues or recommendations that can be used during future planning to improve SA Tourism's programmes.

Please note that your responses will remain confidential and will only be presented in an aggregated form.

We appreciate you taking the time to answer the following questions as accurately as possible.

Thank you for your participation!

SECTION 1: BASIC QUALITY VERIFICATION PROGRAMME OVERVIEW

This section aims to understand the Basic Quality Verification (BQV) Programme in more detail.

1.1. How long have you been an Evaluator for the BQV Programme?

1.2. Please provide an overview of your role/objectives as an Evaluator?

1.3. In your view, what services/support/assistance does the *BQV Programme* provide to beneficiaries?

1.4. What is the *BQV Programme's* intended impact on a) its target groups and b) the Tourism sector?

SECTION 2: PROGRAMME OUTCOME

Relevance

This sub-section aims to determine whether the BQV Programme is relevant to government objectives and target groups' needs and priorities.

2.1. What issues within the sector does the *BQV Programme* address and how does it address these?

2.3. How is the *BQV Programme* crucial to the tourism sector and its development?

2.4. Why should the *BQV Programme*, as a tourism sector development intervention, be continued?
/ What would be the likely result if the *programme* was non-existent?

Effectiveness

This sub-section aims to determine the extent to which the programme has achieved its objectives.

2.5. How are beneficiaries responding to the *BQV Programme*? Are they fulfilling the objectives of the *programme*?

SECTION 3: PROGRAMME ECONOMIC/EFFICIENCY

The section assesses whether the costs of a programme are proportionate with the benefits.

3.1. What resources do you mainly use to carry out your duties as an Evaluator? (Funding, human, infrastructure, equipment, etc.)

3.2. Do these resources allow you to carry out your duties in the most efficient manner, with minimum wasted effort or expense? Could there be any improvement and how?

3.3. How timely and efficient was the *BQV Programme's* process for reporting and monitoring?

3.4. What were the critical issues (if any) in the *BQV Programme's* resourcing that should be addressed to enhance its support services and impact? / What are the challenges in accessing the required resources? (E.g., Do you think the resources used in implementation are sufficient? / Does the *programme* have sufficient access to these?)

3.5. What are potential pitfalls, if any, that may affect the *programme* support provision or impact? How can they be avoided?

SECTION 4: PROGRAMME IMPACT

Impact

This section aims to measure changes in outcomes (and the wellbeing of the target population) that are attributable to the programme.

4.1. Did the *BQV Programme* produce the intended impacts in the short, medium, and long term? / What were the impacts on beneficiaries, sector, and economy?/ What difference did the *programme* make?

4.2. What were the unintended (i.e. unforeseeable) impacts?

4.3. What were the overall benefits of the *BQV Programme* and who benefitted? Can this be quantified? If so, pls provide data related to this.

Sustainability

This sub-section aims to determine whether the benefits of the programme are likely to continue after the support is completed.

4.4. Are the *BQV Programme's* impacts/benefits likely to continue/be sustained after it is completed? Please elaborate.

4.5. What factors influence the sustainability of these impacts/benefits?

4.6. What can be done to improve the sustainability of the *BQV Programme's* support?

4.7. How could things be done better in the future?

Annexure B: SA Tourism BQV Questionnaire for Beneficiaries

SA TOURISM EVALUATION QUESTIONNAIRE

Dear Respondent,

South African Tourism (SA Tourism) has appointed Urban-Econ Development Economists, along with Nikela: Urban-Econ, to develop and implement the SA Tourism Programme Evaluation Framework for selected programmes.

The primary objective of the study is to assist SA Tourism to:

- strengthen its programme and programme planning and execution;
- improve accountability;
- contribute to more effective decision-making; and
- realise or maximize its intended impacts.

A critical part of the study is to actively engage with all the interested and affected parties of the selected programmes, which include the stakeholders that are either directly or indirectly linked to the programmes.

This questionnaire aims to obtain the following information from key stakeholders of the selected programmes:

- Whether the programmes have successfully delivered on their intended outcomes and impacts as reflected in SA Tourism's programme plans.
- Determine the benefits that have been derived from the selected programmes and the link to the outcomes of SA Tourism.
- Issues or recommendations that can be used during future planning to improve SA Tourism's programmes.

Please note that your responses will remain confidential and will only be presented in an aggregated form.

We appreciate you taking the time to answer the following questions as accurately as possible.

Thank you for your participation!

SECTION 1: BASIC QUALITY VERIFICATION PROGRAMME OVERVIEW

This section aims to understand the Basic Quality Verification (BQV) Programme in more detail.

1.1. Please describe the nature of your business.

1.2. How did you find out about the BQV Programme?

1.3. What services/support/assistance did the BQV Programme provide to your business?

SECTION 2: PROGRAMME OUTCOME

Relevance

This sub-section aims to determine whether the BQV Programme is relevant to government objectives and target groups' needs and priorities.

2.1. In your view, what issues within the sector does, the BQV Programme address and how does it address these?

2.2. Do you think that the BQV Programme is crucial to the tourism sector and its development?
Please elaborate.

2.3. Why should the BQV Programme, as a tourism sector development intervention, be continued?
/ What would be the likely result if the programme was non-existent?

SECTION 3: PROGRAMME IMPACT

Impact

This section aims to measure changes in outcomes (and the wellbeing of the target population) that are attributable to the BQV Programme.

3.1. What was the impact of the *BQV Programme* on your business? What difference did the programme make?

3.2. What were the unintended (i.e. unforeseeable) impacts on your business?

Sustainability

This sub-section aims to determine whether the benefits of the BQV Programme are likely to continue after the support is completed.

3.3. Would you like the *BQV Programme* to continue? Please elaborate.

3.4. Do you have any recommendations/suggestions for the *BQV Programme* for future purposes?

Annexure C: SA Tourism Evaluation Questionnaire for Traders

SA TOURISM EVALUATION QUESTIONNAIRE

Dear Respondent,

South African Tourism (SA Tourism) has appointed Urban-Econ Development Economists, along with Nikela: Urban-Econ, to develop and implement the SA Tourism Programme Evaluation Framework for selected programmes.

The primary objective of the study is to assist SA Tourism to:

- strengthen its programme and programme planning and execution;
- improve accountability;
- contribute to more effective decision-making; and
- realise or maximize its intended impacts.

A critical part of the study is to actively engage with all the interested and affected parties of the selected programmes, which include the stakeholders that are either directly or indirectly linked to the programmes.

This questionnaire aims to obtain the following information from key stakeholders of the selected programmes:

- Whether the programmes have successfully delivered on their intended outcomes and impacts as reflected in SA Tourism's programme plans.
- Determine the benefits that have been derived from the selected programmes and the link to the outcomes of SA Tourism.
- Issues or recommendations that can be used during future planning to improve SA Tourism's programmes.

Please note that your responses will remain confidential and will only be presented in an aggregated form.

We appreciate you taking the time to answer the following questions as accurately as possible.

Thank you for your participation!

SECTION 1: SHO'T LEFT TRAVEL WEEK PROGRAMME OVERVIEW

This section aims to understand the project in more detail.

1.4. Please describe the nature of your business.

1.5. How did you find out about the *Sho't Left Travel Week Programme*?

1.6. What services/support/assistance did the *Sho't Left Travel Week Programme* provide to your business?

SECTION 2: PROGRAMME OUTCOME

Relevance

This sub-section aims to determine whether the programme is relevant to government objectives and target groups' needs and priorities.

2.1. In your view, what issues within the sector does, the *Sho't Left Travel Week Programme* address and how does it address these?

2.3. Do you think that the *Sho't Left Travel Week Programme* is crucial to the tourism sector and its development? Please elaborate.

2.4. Why should the *Sho't Left Travel Week Programme*, as a tourism sector development intervention, be continued? / What would be the likely result if the *programme* was non-existent?

SECTION 3: PROGRAMME IMPACT

Impact

This section aims to measure changes in outcomes (and the wellbeing of the target population) that are attributable to the programme.

3.5. What was the impact of the *Sho't Left Travel Week Programme* on your business? What difference did the *programme* make?

3.6. What were the unintended (i.e. unforeseeable) impacts on your business?

Sustainability

This sub-section aims to determine whether the benefits of the programme are likely to continue after the support is completed.

3.7. Would you like the *Sho't Left Travel Week Programme* to continue? Please elaborate.

3.8. Do you have any recommendations/suggestions for the *Sho't Left Travel Week Programme* for future purposes?

Annexure D: SA Tourism Evaluation Questionnaire for Beneficiaries

SA TOURISM EVALUATION QUESTIONNAIRE

Dear Respondent,

South African Tourism (SA Tourism) has appointed Urban-Econ Development Economists, along with Nikela: Urban-Econ, to develop and implement the SA Tourism Programme Evaluation Framework for selected programmes.

The primary objective of the study is to assist SA Tourism to:

- strengthen its programme and programme planning and execution;
- improve accountability;
- contribute to more effective decision-making; and
- realise or maximize its intended impacts.

A critical part of the study is to actively engage with all the interested and affected parties of the selected programmes, which include the stakeholders that are either directly or indirectly linked to the programmes.

This questionnaire aims to obtain the following information from key stakeholders of the selected programmes:

- Whether the programmes have successfully delivered on their intended outcomes and impacts as reflected in SA Tourism's programme plans.
- Determine the benefits that have been derived from the selected programmes and the link to the outcomes of SA Tourism.
- Issues or recommendations that can be used during future planning to improve SA Tourism's programmes.

Please note that your responses will remain confidential and will only be presented in an aggregated form.

We appreciate you taking the time to answer the following questions as accurately as possible.

Thank you for your participation!

SECTION 1: SHO'T LEFT TRAVEL WEEK PROGRAMME OVERVIEW

This section aims to understand the programme in more detail.

1.7. How did you find out about the *Sho't Left Travel Week Programme*?

1.8. How and what is your level of involvement in the *Sho't Left Travel Week Programme*?

1.9. What services/support/assistance have you received from the *Sho't Left Travel Week Programme*?

SECTION 2: PROGRAMME OUTCOME

Relevance

This sub-section aims to determine whether the project is relevant to government objectives and target groups' needs and priorities.

2.1. Are you aware of any issues within the sector that the *Sho't Left Travel Week Programme* has managed to address? Please elaborate.

2.2. In your view, how is the *Sho't Left Travel Week Programme* crucial to the tourism sector and its development?

SECTION 3: SECTION 4: PROGRAMME IMPACT

Impact

This section aims to measure changes in outcomes (and the wellbeing of the target population) that are attributable to the programme.

3.1. Did the Sho't Left Travel Week Programme benefit you in any way? / What difference did the programme make?

3.2. Did the *Sho't Left Travel Week Programme* result in any unintended (i.e. unforeseeable) impacts?

3.3. What were the overall benefits of the *Sho't Left Travel Week Programme* and are you aware of anyone else who benefitted?

Sustainability

This sub-section aims to determine whether the benefits of the programme are likely to continue after the support is completed.

3.4. Would you like the *Sho't Left Travel Week Programme* to continue? Please elaborate.

3.5. Do you have any recommendations/suggestions for the *Sho't Left Travel Week Programme* for future purposes?

