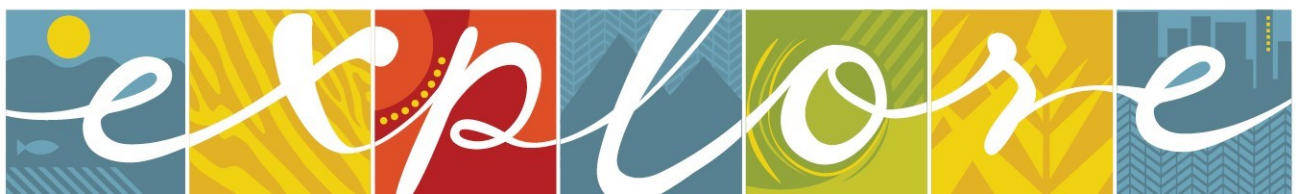


## STRATEGIC PLAN FOR 2020/21 – 2024/25

DATE OF TABLING: MARCH 2020

OFFICE OF THE CEO | MARKETING | CORPORATE SERVICES | OPERATIONS | FINANCE | RESERVATIONS

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## Accounting Authority Statement

As the Accounting Authority I confirm that the Board of the Eastern Cape Parks and Tourism Agency has provided strategic direction and oversight. These responsibilities are executed as mandated in Section 49 (1) (a) and Treasury Regulation 30 of the Public Finance Management Act (PFMA) (Act No.1 of 1999).

The Eastern Cape Parks and Tourism Agency (ECPTA) herewith submits the Strategic Plan for the Medium Term Strategic Framework Period 2020/21-2024/25.

This is the first set of plans prepared using the Revised Framework for Strategic and Annual Performance Plans. As such, these plans are informed by the inputs of stakeholders, and are expressed in terms of the change ECPTA intends to work towards:

- Adaptive management of biodiversity sustains ecological services
- Marginalised individuals and communities actively benefit from biodiversity and tourism
- The Province is the premier African destination connecting people to authentic experiences
- Clean audit status and 90% performance record retained in support of achievement of mandated functions

The Accounting Authority of the ECPTA undertakes to ensure that in the execution of its duties it complies with the ECPTA Act (2 of 2010), the PFMA, and all other relevant legislation. I undertake to do all within my powers to assist the ECPTA in realising the priorities outlined above and detailed in this plan.



---

Nomkhita Mona

Chairperson: ECPTA Board of Directors

Accounting Authority

## Accounting Officer Statement

ECPTA is a Schedule 3 C public entity accounting to the Department of Economic Development, Environmental Affairs and Tourism. Consequently, ECPTA responds directly to the Eastern Cape Vision 2030 Provincial Development Plan as expressed in the Premier’s State of the Province Address on 25 February 2020, the National Development Plan, the National Strategy for Sustainable Development and the Provincial Medium-Term Strategic Framework. This plan is further informed by national and provincial socio-economic priorities to contribute towards a more equitable society, specifically one where **“Responsible conservation and tourism benefit current and future generations”**.

ECPTA has embarked on a path to synchronise its brand positioning to that of Brand South Africa. The consequent corporate rebranding of the ECPTA will take place in lockstep with rebranding the Province as an internationally recognisable South African tourism destination. As the Public Entity charged with conserving the province’s natural resources (within protected areas assigned to the Agency) and building the tourism industry, ECPTA is acutely conscious of the province’s orientation to sustainable development. While this consciousness informs the content of our programmes, it is also fundamental to the manner we engage with partners, communities, beneficiaries, sister agencies, our shareholder and other organs of state.

The emerging strategy for 2020-24 emphasises the need for the ECPTA to be better geared to deliver on its developmental role. This performance plan therefore brings together a definitively developmental approach and our ongoing conservation and tourism promotion work.

ECPTA sees the coincidence of climate change, depressed economic conditions, and a fresh commitment to service delivery as an opportunity to address its mandate priorities in a more integrated and sustainable manner. From a conservation perspective, our efforts will include ensuring that the province has an appropriate protected area footprint that secures key ecological corridors. Sustaining ecological services

is viewed as a critical contribution to building climate resilience and ultimately human survival.


In order to successfully market the province as a tourist destination, it is necessary to constantly revitalise offerings, including by drawing on a pipeline of market-ready products. Over the MTSF, we intend to support more emerging products and businesses to participate in the mainstream tourism industry. Key to these efforts will be the sector’s ability to take advantage of heritage and cultural offerings, to blend rural and urban settings, and to showcase the province’s myriad unique landscapes. Support will also be extended to new and existing game farming sites participating in the provincial game industry transformation programme. Our strategic analysis indicates that there is an urgency for ECPTA and our partners to bring micro-packaging and route-planning services to scale; that implementation of the Reserves-as-Products strategy should be prioritised, and that ECPTA should continue to leverage stakeholders’ technology and networks for campaigns.

The exceptional women and men of ECPTA are committed to our values of RESPECT, HUMILITY, INTEGRITY, NECESSITY and OPTIMISM, thus ensuring that the phrase “ECPTA values RHINO” is evident in all our work.

In delivering on our mandate, ECPTA will remain alert to the need to achieve balance:

- Between the pressure to market products on one hand and the readiness of products on the other;
- Between the fiscal reality of shrinking budgets with the urgency of developmental challenges
- Between responsibility for conserving natural resources and community benefit from those resources

We are grateful for the support and guidance of the Executive Authority, the Stakeholder Department and the Accounting Authority, and undertake to sustain the high-quality delivery and clean administration which have come to define the ECPTA.



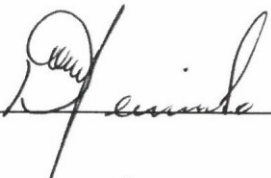
\_\_\_\_\_  
 Vuyani Dayimani  
 Accounting Officer

## Official Sign-Off

It is hereby certified that this Strategic Plan:

- Was developed by the management of the ECPTA under the guidance of the Board of Directors
- Considers all the relevant policies, legislation and other mandates for which the ECPTA is responsible.
- Accurately reflects the Impact and Outcomes that the ECPTA will endeavour to achieve over the period 2020-2025.

Dean Peinke  
Acting Chief Operations Officer

Signature 

Lihle Dlamini  
Chief Marketing Officer

Signature 

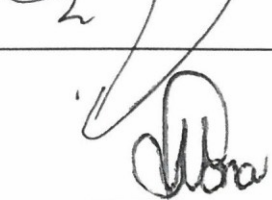
Jonathan Jackson  
Chief Financial Officer

Signature \_\_\_\_\_

Maryke Savenije  
Head Official responsible for Planning

Signature 

Vuyani Dayimani  
Accounting Officer

Signature 

Nomkhita Mona  
Accounting Authority

Signature \_\_\_\_\_

APPROVED BY:

Honourable M Mvoko  
Executive Authority

Signature 

## CONTENTS

Executive Authority Statement .....	1
Accounting Officer Statement .....	2
Official Sign-Off .....	3
<b>PART A: Our Mandate.....</b>	<b>6</b>
A.1 Constitutional mandate.....	6
A.2 Legislative and policy mandates .....	6
Legislative mandates .....	6
Policy Mandates.....	8
A.3 Institutional Policies and Strategies over the planning period.....	11
Policies.....	11
Strategies.....	11
A.4 Relevant court rulings.....	11
<b>PART B: Our Strategic Focus .....</b>	<b>12</b>
B.1 Vision .....	12
B.2 Mission .....	12
B.3 Values .....	12
B.4 Situational Analysis.....	13
Developmental Orientation.....	13
External Environment Analysis.....	17
Internal Environment Analysis .....	27
B.5 Strategic Response .....	34
Interpretation of SWOT analysis .....	34
<b>PART C: Measuring Our Performance.....</b>	<b>36</b>
C.1 Institutional Performance Information .....	36
Measuring the Impact.....	36
Measuring Outcomes.....	36
C.2 Planned Performance over the Five-Year Planning Period.....	37
Theory of Change.....	37
Assumptions informing the ECPTA Theory of Change .....	38
Results Chain .....	41
<b>PART D: Technical Indicator Descriptions (TIDs).....</b>	<b>42</b>

## LIST OF FIGURES

Figure 1: Outcome of Trend Harvesting Workshop. 16 February 2018 .....	14
Figure 2: Area of interest as cited by respondents (ECPTA online survey July-August 2019) .....	17
Figure 3: South Africa Travel & Tourism Competitiveness (Source: World Economic Forum (WEF_TTCI_2019_Profile_ZAF)) .....	19
Figure 4: Number   proportion  (change) in domestic trips by purpose of travel (National).....	20
Figure 5: Number 2018   Number 2017 of domestic trips by purpose of travel (Eastern Cape) .....	21
Figure 6: Spending trends of local visitors .....	21
Figure 7: Ranking achievement compared to tourism marketing budgets.....	22
Figure 8: Eastern Cape Protected Area Expansion Strategy Priority Areas .....	24
Figure 9: Location of Provincial Nature Reserves .....	26
Figure 10: South Africa Inflation Rate (April 2015 – September 2019) .....	29

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## ***ABBREVIATIONS AND ACRONYMS***

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<b>APP</b>	Annual Performance Plan	<b>PAES</b>	Protected Area Expansion Strategy
<b>CEO</b>	Chief Executive Officer	<b>PDI</b>	Previously Disadvantaged Individual
<b>CMS</b>	Corporate Management Support	<b>PDP</b>	Provincial Development Plan
<b>DEDEAT</b>	Department of Economic Development, Environmental Affairs and Tourism	<b>PFMA</b>	Public Finance Management Act
<b>DEFF</b>	National Department of Environmental Affairs, Forestry and Fisheries	<b>PGDP</b>	Provincial Growth and Development Plan
<b>ECPTA</b>	Eastern Cape Parks and Tourism Agency	<b>RAP</b>	Reserves as Products
<b>MEC</b>	Member of the Executive Council	<b>SAT</b>	South African Tourism
<b>MTEF</b>	Medium Term Expenditure Framework	<b>SMME</b>	Small, Medium and Micro Enterprises
<b>MTSF</b>	Medium Term Strategic Framework	<b>StatsSA</b>	Statistics South Africa
<b>NDP</b>	National Development Plan	<b>UNDP</b>	United Nations Development Programme
<b>NSSD</b>	National Strategy for Sustainable Development	<b>VFR</b>	Visiting Friends and Relatives
<b>OSI</b>	Organisational Sustainability Index		

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## PART A: Our Mandate

### A.1 Constitutional mandate

The mandate of the ECPTA links back to the Constitution of the Republic of South Africa, 1996 (Act 108 of 1996), Chapter 2: Bill of Rights (ss 24) – Environment, which states:

Everyone has the right to:

- (b) have the environment protected, for the benefit of present and future generations, through reasonable legislative and other measures that –
  - i. prevent pollution and ecological degradation
  - ii. promote conservation; and
  - iii. secure ecologically sustainable development and use of natural resources while promoting justifiable economic and social development.

### A.2 Legislative and policy mandates

The ECPTA’s founding legislation is the Eastern Cape Parks and Tourism Agency Act, 2010 (Act 2 of 2010). The Act specifies that the objects of the Agency are to:

- (a) manage biodiversity in protected areas located in the Province;
- (b) manage tourism in the Province;
- (c) ensure the effective implementation of its biodiversity management and tourism and powers and duties granted in terms of this Act and any other law; and
- (d) ensure excellence in the business and resource management of the Agency

In doing so, ECPTA takes a range of national and provincial legislation into account, including but not exclusively the legislation listed in the table below:

#### Legislative mandates

Relevant Acts	Key Responsibilities
Cape Nature and Environmental Conservation Ordinance (19 of 1974)	The provincial nature reserves in sections of the former Cape Province were declared under this legislation
Ciskei Conservation Act, 1987 (Act 10 of 1987)	The Eastern Cape is in the process of proclaiming new provincial environmental legislation where the old (pre-1994 democracy) ordinances remained relevant. This ordinance governs the management of biodiversity conservation areas in the former Ciskei

Relevant Acts	Key Responsibilities
Eastern Cape Parks and Tourism Agency Act, 2010 (Act 2 of 2010) [under review]	This is the Agency's establishment legislation, allowing for ECPTA to (i) develop and manage protected areas (ii) promote and facilitate the development of tourism in the Province
Fencing Act, 1963 (Act 31 of 1963) (as amended)	The Fencing Act regulates the rights and obligations of adjacent owners regarding all types of boundary fences
Fire Arms Control Act, 2000 (Act 60 of 2000)	National legislation prescribing competency, certification, licensing, storage, transport and carrying of firearms and ammunition is relevant to the security of reserves for which ECPTA is responsible
Marine Living Resources Act, 1998 (Act 18 of 1998)	This is the primary legislation governing the management of marine living resources and is applicable to all Marine Protected Areas
National Building Regulations and Building Standards Act, 1977 (Act 103 of 1977)	This legislation governs the building industry and is relevant for all ECPTA infrastructure development projects.
National Environmental Management Act, 1998 (Act 107 of 1998)	This is the national environmental legislation which provides guidance on environmental management as well as the interpretation of the ECPTA Act (Act 2 of 2010)
National Forests Act, 1998 (Act 84 of 1998)	This is the primary legislation governing the management of indigenous forests and woodlands. Many state forests have been proclaimed as Forest Nature Reserves in terms of the National Forests Act
National Veld and Forest Fire Act, 1998 (Act 101 of 1998)	This is the primary legislation governing the prevention and control of runaway wildfires. Fire is used as a biodiversity management tool and control of excessive fires is also important for the management of protected areas and prevention of damage to infrastructure
National Water Act, 1998 (Act 36 of 1998)	This is the primary legislation governing the use of water.
NEM: Biodiversity Act, 2004 (Act 10 of 2004) (as amended)	This is the primary legislation for the management of biodiversity across the landscape and guides the interpretation of the ECPTA Act (Act 2 of 2010). Sections 43 and 44 concern the publication of Biodiversity Management Plans for conservation of ecosystems and indigenous species
NEM: Integrated Coastal Management Act, 2008 (Act 24 of 2008)	This is the primary legislation governing the management of the coastal areas and prescribes the management of coastal protected areas
NEM: Protected Areas Act, 2003 (57 of 2003)	This is the primary legislation governing the management of protected areas and guides the interpretation of Act 2 of 2010



Relevant Acts	Key Responsibilities
NEM: Waste Management Act, 2008 (Act 59 of 2008)	This is the primary legislation governing waste management measures, waste management activities, and reporting on waste impact, including in protected areas
Occupational Health and Safety Act, 1993 (Act 85 of 1993)	This is the primary legislation governing health and safety standards in the context of all work environments
Public Finance Management Act, 1999 (Act 1 of 1999) (as amended) (PFMA)	Chapter 6 of the PFMA applies specifically to Public Entities. It lays out prescripts for the conduct of Accounting Authorities and other officials with respect to fiduciary responsibilities, planning, reporting and conduct
Spatial Planning and Land Use Management Act, 2013 (Act 16 of 2013) (SPLUMA)	Chapter 5 of SPLUMA specifies that land use management must ensure minimal impact on public health, the environment and natural resources  Regulation 23 dictates that land use schemes must incorporate environmental requirements
Tourism Act, 2014 (Act 3 of 2014)	<ul style="list-style-type: none"> <li>• The promotion of responsible tourism practices</li> <li>• Provisions for the effective marketing of the province, both domestically and internationally</li> <li>• The promotion of quality tourism products and services</li> <li>• The promotion of economic growth and development of the sector</li> <li>• The establishment of concrete inter-governmental relations to develop and manage tourism</li> </ul>
Transkei Environmental Conservation Decree, 1992 (Decree 9 of 1992)	The Eastern Cape is in the process of proclaiming new provincial environmental legislation where the old (pre1994 democracy) ordinances remained relevant. This ordinance governs the management of biodiversity conservation areas in the former Transkei
World Heritage Convention Act, 1999 (Act 49 of 1999)	This is the primary legislation governing the management of World Heritage Sites, which, in the case of the ECPTA, is applicable to the management of the Baviaanskloof section of the Cape Floral Region World Heritage Site

## Policy Mandates

ECPTA's strategy finds synergy with a variety of strategy documents, such as:

National and Provincial Strategy Documents	Relevance to ECPTA strategy
Khawuleza	District-based coordination model aims to address service delivery and economic development challenges through the synchronisation of planning across all spheres of government, working alongside social partners such as business and community. Development will be pursued through single, integrated district plans enabled by the vision of "One District; One Plan; One Budget; One Approach". With effect from the

National and Provincial Strategy Documents	Relevance to ECPTA strategy
	2020/21 Budget cycle, government budgets and programmes will be spatially referenced to districts and metros.
2019-2024 Medium Term Strategic Framework (MTSF), including 5-year implementation plan for the National Development Plan (NDP)	<p>The MTSF focuses on the seven priorities of the 6<sup>th</sup> administration. ECPTA’s mandate finds expression across the 7 priorities with specific contributions to:</p> <ul style="list-style-type: none"> <li>• Employment creation               <ul style="list-style-type: none"> <li>• Address apartheid spatial discrepancies by identifying potential and developing industries in the former Bantustans, including tourism</li> <li>• Activate rural economies through investment in tourism (among others)</li> </ul> </li> <li>• Recreation and Leisure               <ul style="list-style-type: none"> <li>• The tourism economies to offer activities and experiences that are appealing to domestic travellers, not only international travellers</li> </ul> </li> <li>• Clean environment               <ul style="list-style-type: none"> <li>• Environmental sustainability and resilience are key features of the NDP approach to ensuring that oceans, soil, water, and biodiversity are protected</li> </ul> </li> </ul>
National Tourism Sector Strategy	Contribute to global competitiveness of South African tourism sector through enhanced service levels and responsive product development
National Strategy for Sustainable Development (NSSD)	The NSSD defines the strategic imperatives of the South African Government as they relate to the interaction between people, the environment and the economy.
Provincial Medium Term Strategic Framework (PMTSF) [2020 – 2025]	<p>The PMTSF aligns the goals of Vision 2030 (the Provincial Development Plan) with the pillars of the national MTSF. To achieve the vision that the “Eastern Cape will be a place where all people reach their potential by 2030”, the PMTSF sets out a plan to deliver on the 7 MTSF priorities:</p> <p>Priority 1: Capable, ethical and developmental state</p> <p>Priority 2: Economic transformation and job creation</p> <p>Priority 3: Education, skills and health</p> <p>Priority 4: Consolidating the social wage through reliable quality basic services</p> <p>Priority 5: Spatial integration, human settlements and local government</p> <p>Priority 6: Social cohesion and safe communities</p> <p>Priority 7: A better Africa and a better world</p> <p>ECPTA is specifically mandated to contribute directly to Priorities 2 and 5, and is committed to contributing to Priority 1</p>
Eastern Cape Tourism Master Plan	<ul style="list-style-type: none"> <li>• Improve and maintain accessibility of tourism facilities</li> <li>• Reputation management</li> <li>• Tourist safety</li> <li>• Service standards</li> <li>• Transform and grow the economy</li> </ul>

**National and Provincial Strategy Documents**

**Relevance to ECPTA strategy**

Provincial Economic Development Strategy (PEDS)

The PEDS identifies tourism as a high potential sector, and identifies a number of opportunities. These include tourism, business tourism, and improved management of tourism “packages”, all of which will benefit from increased marketing of the province’s unique assets

SAT Five-Year Strategic Plan for 2020/21 – 2024/25

The SAT strategy outlines 7 MTSF aligned strategic focus areas. Whereas 1 – 5 require direct alignment and support from the provinces, focus areas 6 and 7 are inward-looking for the sole attention of SAT. ECPTA’s Tourism strategy thus aligns to focus areas 1 – 5:

- |                    |                              |
|--------------------|------------------------------|
| 1. Brand           | 5. Visitor Experience        |
| 2. Domestic Market | 6. Organisational efficiency |
| 3. Arrivals        | 7. Stakeholder engagement    |
| 4. Demand creation |                              |

National Biodiversity Economy Strategy (NBES)

The NBES describes the biodiversity economy as combining agriculture, eco-tourism and conservation. ECPTA’s strategy aligns to the NBES by supporting the full spectrum of the wildlife, tourism and eco-tourism value chains. The emphasis across all three is diversification of value chains and support for mainstreaming

The table below demonstrates alignment of ECPTA’s strategic commitments to the Sixth Administration’s Programme of Action towards “**Building the Eastern Cape we want**”:

**Provincial Priority: ECPTA potential contribution:**

A capable, ethical and developmental state

- To retain a clean audit status
- To adopt an overtly developmental approach to work in communities and with stakeholder groups

Economic transformation and job creation

- Support new entrants and previously disadvantaged product owners in the conservation and tourism industries to operate in the mainstream as soon as possible
- Addressing industry blockages (particularly related to red-tape barriers to entry) with relevant stakeholders on a case-by-case basis
- Collaborate with national and provincial departments that are leading the development of coastal hubs and priority tourism growth points
- Facilitate integration of development plans for affected provincial nature reserves into overall development plans
- Continue to offer internship and learnership opportunities to young tourism and conservation graduates
- Amplify marketing efforts through increased utilisation of digital and social media platforms

Spatial integration, human

- Contribute to the science of conservation
- Conduct community engagement and awareness campaigns to encourage responsible resource use and decrease poaching

**Provincial Priority:**    **ECPTA potential contribution:**

settlements and local government	<ul style="list-style-type: none"> <li>Actively implement the agenda of the Provincial People and Parks Programme to ensure biodiversity conservation and biodiversity economy opportunities are accessed as part of integrated development planning in local municipalities</li> </ul>
Social cohesion and safe communities	<ul style="list-style-type: none"> <li>Enhance the Agency’s Anti-poaching and Reserve Security capability</li> <li>To work with law enforcement / security cluster partners to comply with NEMA</li> <li>Support the Home of Legends project in establishing important historical sites as tourism products</li> <li>Efforts will continue throughout the MTEF period to ensure the activation of the necessary regulations to support the ECPTA ACT (2 of 2010) provisions that allow for the retention of own revenue for conservation and tourism development</li> <li>In addition to revenue retention, ECPTA is working to ensure that regulations are activated to facilitate the regulation of Tour Guides in the Province as a mechanism for improving tourism standards</li> </ul>

As a Schedule 3C public entity reporting to the Eastern Cape Department of Economic Development, Environmental Affairs and Tourism (DEDEAT), the ECPTA contributes to the achievement of the Department’s Strategic Goal: Innovation for Sustainable Development. These efforts dovetail with Executive Authority commitments, especially Enterprise Development: SMMEs supported, Tourism Sector Development: Tourism promotion in the Province and Managing and Protecting the natural environment.

### A.3 Institutional policies and strategies over the 5-year planning period

Institutional policies and strategies are used only when those in national or provincial sphere require localisation or interpretation.

#### Policies

- Recruitment
- Supply Chain Management
- Risk Management
- Talent Management
- Game Industry Transformation
- Remuneration

#### Strategies

- Tourism
- Reserves as Products
- Commercialisation
- Infrastructure Master Plan (by end 2020/21)

### A.4 Relevant court rulings

Nil of note

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## PART B: Our Strategic Focus

### B.1 Vision

ECPTA envisions:

- Inclusive economic growth in the Eastern Cape supported by the sustainable utilisation of natural resources

### B.2 Mission

ECPTA's mission is to ...

- Lead responsible conservation and tourism for the benefit of current and future generations

### B.3 Values

ECPTA values **RHINO** ...



We treat the environment, our communities, our partners and one another with respect and dignity



There is a spirit of caring, community, harmony and responsiveness in our approach to our work



We conduct our business in a principled manner that is honest and uncompromising



We are pragmatic about sustaining a balance between human progress, economic growth and environmental conservation



We are committed to collaborations that build a positive future for our Province

## B.3.1 Situational Analysis

### Developmental Orientation

The National Development Plan (NDP) 2030 outlines a developmental state as being one that “brings about rapid and sustainable transformation in a country’s economic and/or social conditions through active, intensive and effective intervention in the structural causes of economic or social underdevelopment” (NDP, 2011: p 409).

The mandate of the ECPTA, while rooted in the Constitution and its own founding legislation, is subject to the overriding concepts expressed in the NDP. Firstly, as an organ of state, ECPTA is expected to be ‘developmental’; this requires the Agency to embrace policies that aim to lift South Africans out of poverty, eradicate inequality and create jobs. Secondly, a developmental state must also be ‘capable,’ demonstrably implementing the developmental policies. The state must provide the necessary institutions and infrastructure to ensure the economy performs in a socially optimal manner (state investment in infrastructure).

The ECPTA’s establishing legislation is clear regarding the Agency’s orientation, with paragraph 11(2)(h) requiring ECPTA to:

*Promote socio-economic growth and transformation within the biodiversity management sector and tourism industry, thereby creating economic and employment opportunities for previously disadvantaged individuals and local communities in the Province*

### Listening to Stakeholders

Since its formation in 2010, as an amalgamation of the Eastern Cape Parks and Tourism Boards, ECPTA has invested significant effort in building a credible stakeholder base. As such, ECPTA views its stakeholders as critical partners in delivering on the organisation’s strategy, and endeavours to align its strategy as closely to stakeholder expectations as possible.

The process of hearing and understanding stakeholder experiences and expectations towards this 2020-25 Strategic Plan began in earnest during the 2017/18 financial year. The “Trends Harvesting” workshop in February 2018 represented the beginning of a process of identifying trends to which ECPTA should be responding over the next strategic cycle.

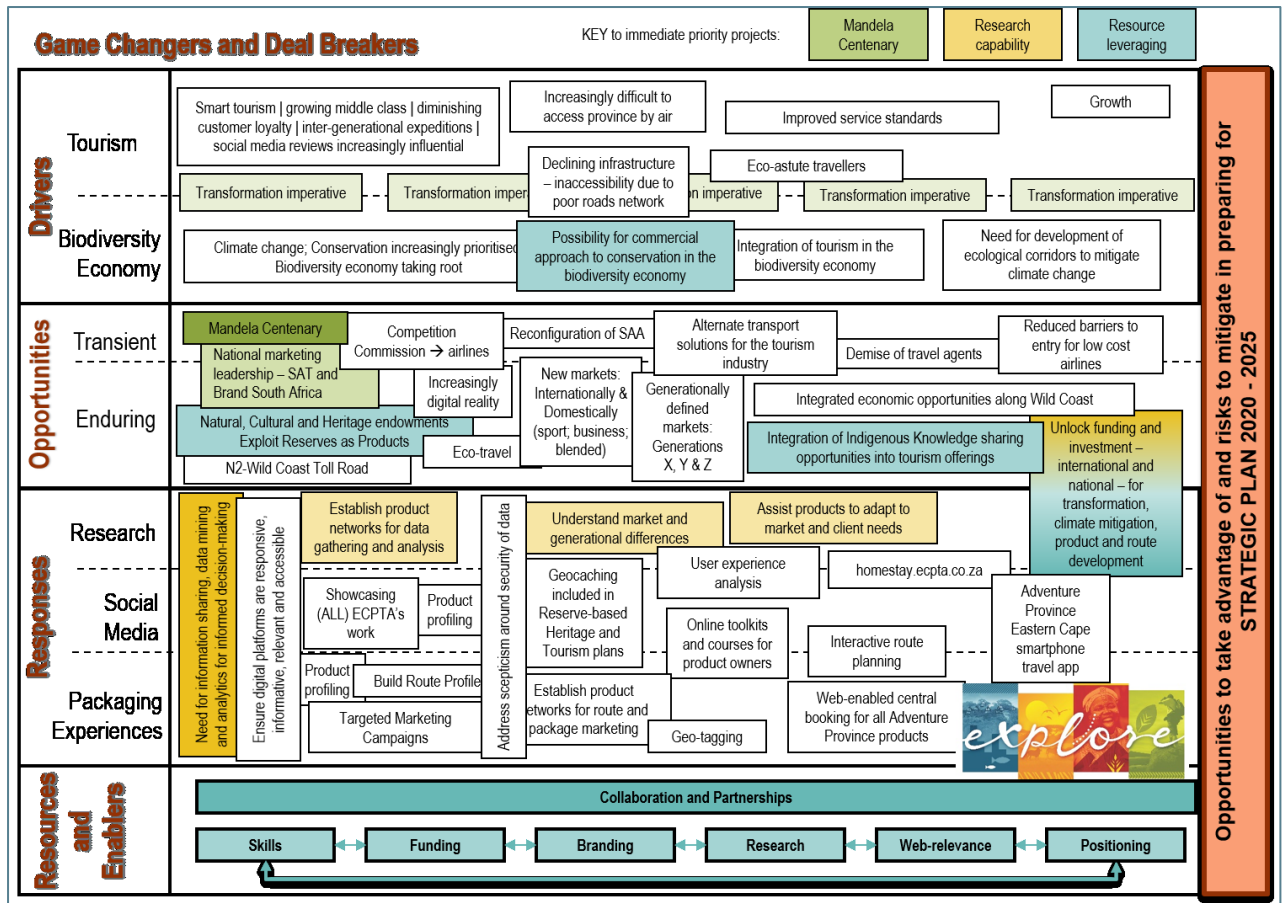
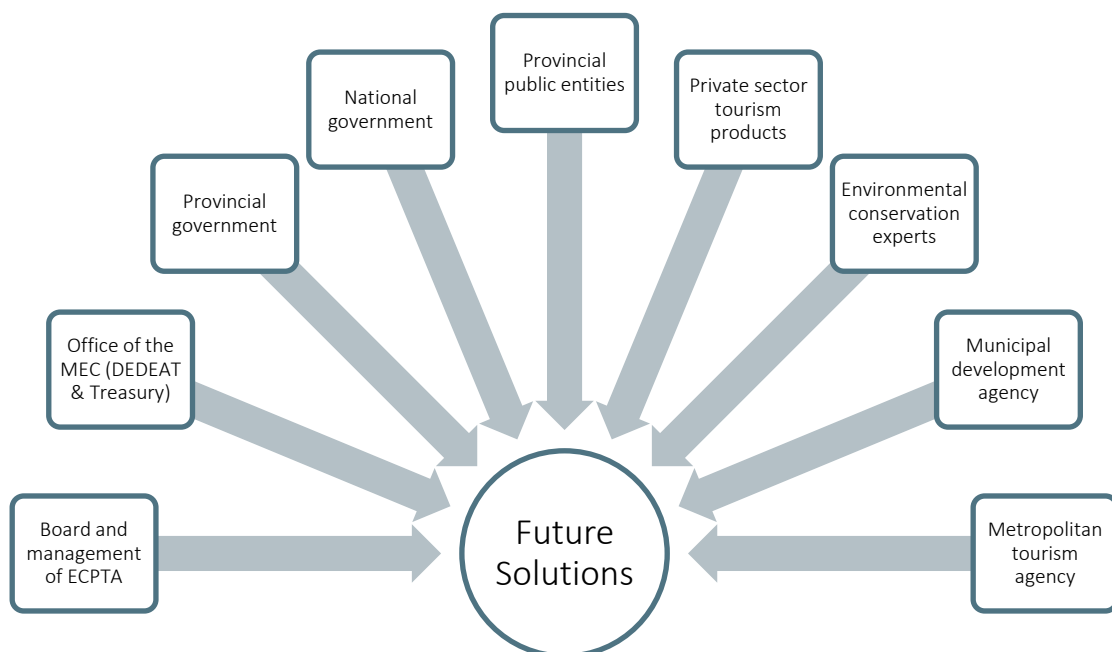


Figure 1: Outcome of Trend Harvesting Workshop. 16 February 2018

At the “Future Solutions” Workshop 6 months later, ten trends were lifted from the first workshop as the basis of discussion and progress. Over 60 contributors with diverse interests collaborated to identify fresh responses to problems limiting the Province’s conservation and tourism successes. Contributors represented the following interest groups:



The tables below capture a summary of discussions.

<p><b>Integration of tourism in the biodiversity economy</b></p> <ul style="list-style-type: none"> <li>• EC value proposition for biodiversity economy</li> <li>• Clarify urgency and value of protecting natural resources</li> <li>• Full value chain for the biodiversity economy must be built</li> <li>• Retap reduction for emerging game farmers, bio prospectors and tourism products</li> <li>• Inter-sectoral linkages across the value chain</li> <li>• Access credible training and skills development</li> <li>• Responsible Tourism opportunities</li> </ul>	<p><b>Natural endowments (Species protection)</b></p> <ul style="list-style-type: none"> <li>• High value of the province's biodiversity</li> <li>• Can be marketed as a tourism product</li> <li>• Knowledge and information attach value to conservation of natural resources</li> <li>• View natural endowments as biodiversity heritage</li> <li>• Geo-heritage tourism products</li> <li>• Biodiversity preservation is EVERYBODY's business</li> <li>• Communities central to eradicating alien invasive species</li> <li>• Intergovernmental integration vital</li> </ul>	<p><b>Integration of Indigenous Knowledge into tourism offerings</b></p> <ul style="list-style-type: none"> <li>• Protect and preserve indigenous knowledge to the benefit of the communities that own it</li> <li>• Connecting cultural and natural heritage for tourism packaging</li> <li>• Audit unique / iconic features of cultures that communities are prepared to</li> <li>• Investigate "homestays" as an alternate to "reserve stays"</li> <li>• Develop unique Eastern Cape calendar</li> <li>• PARTNERSHIPS!</li> <li>• Facilitate ways for Elders to share histories, traditional folktales etc.</li> <li>• Connect indigenous knowledge to reserves</li> </ul>
<p><b>Establish product networks for route and package marketing</b></p> <ul style="list-style-type: none"> <li>• The building of routes must be from the "bottom up"</li> <li>• Tourism products to lead the process</li> <li>• Role of municipal local economic development desks must be enhanced</li> <li>• Local Tourism Organisations must be functional</li> <li>• Enablers (distinct for each route) must be identified and rolled out systematically</li> <li>• The functionality of the Provincial Tourism Forum must be reviewed and improved</li> <li>• Increasingly important to integrate routes, products and packages</li> <li>• These must be available and accessible to possible clients across digital platforms</li> <li>• Standards for products should be set and enforced</li> <li>• Marketing of established and new products prioritised</li> <li>• Closed gap in small municipalities</li> <li>• Audit viability of products before packaged</li> </ul>	<p><b>Ecological corridors to mitigate climate change</b></p> <ul style="list-style-type: none"> <li>• Climate Change, too, is EVERYBODY's business</li> <li>• Sustainable development goals – protect the earth and manage it for future generations</li> <li>• Going back to basics to manage the environment – integrate indigenous knowledge into climate change mitigation messaging and education</li> <li>• Understand biodiversity in terms of ecological infrastructure</li> <li>• Establishing ecological corridors will secure provincial environmental and economic benefits           <ul style="list-style-type: none"> <li>• Eco-tourism (?Green Tourism Fund)</li> <li>• Agriculture</li> <li>• Water resources (?water harvesting)</li> </ul> </li> <li>• Need to augment corridor development with carbon footprint reduction campaigns           <ul style="list-style-type: none"> <li>• Recycling</li> <li>• Reduction of consumption</li> <li>• Retrofitting buildings</li> <li>• Reforestation</li> </ul> </li> </ul>	<p><b>New markets and generationally defined markets</b></p> <ul style="list-style-type: none"> <li>• Seeking similarities and solutions</li> <li>• Established international markets to be augmented with addition of US, Australia and Lesotho (as per 5-in-5 strategy)</li> <li>• International marketing currently driven by tour operators in response to Country Reps</li> <li>• Severe financial limitations to penning necessary JMAs to be overcome through:           <ul style="list-style-type: none"> <li>• Targeting youth market (students and gap-year travellers)</li> <li>• Packaging tours and activities around events, conferences and sports competitions</li> <li>• Packaging historical and cultural tours for specific market segments</li> </ul> </li> <li>• Collaborating with neighbouring provinces to geographically expand packages and secure direct air access to the EC</li> <li>• Gear pricing to new markets (discount and adventure travellers)</li> </ul>



Responsive, informative, relevant and accessible digital platforms	Product networks for data gathering and analysis	Integrated economic opportunities along the Wild Coast	Cultural and Heritage endowments
<ul style="list-style-type: none"> <li>• Sustainable green economy</li> <li>• Megatrends</li> <li>• Digital transformation strategy for ECPTA</li> <li>• Increasingly important to streamline and automate ECPTA's business processes</li> <li>• Cost reductions from improved efficiencies</li> <li>• Basic web-site linkages with municipalities, tourism products, community forums etc. will improve availability and utility of information</li> <li>• Integrated booking systems</li> <li>• Connectivity on ECPTA reserves to be prioritised</li> <li>• Improve customer experience through integrated platforms</li> </ul>	<ul style="list-style-type: none"> <li>• Big Data are replacing traditional data sources</li> <li>• More relevant, immediate data can be extracted for decision-making</li> <li>• A clear research / knowledge agenda must guide the mining and analysis of big data</li> <li>• Partnerships are key:               <ul style="list-style-type: none"> <li>• Provincial Tourism Forum</li> <li>• Institutions of higher learning</li> <li>• Cellular networks</li> <li>• Software incubator (ELIDZ)</li> </ul> </li> <li>• Align to social media development and technology trends and respect confidentiality legislation etc.</li> <li>• Analyst post for ECPTA - skill sets compatible with the range and immediacy of Big Data</li> </ul>	<ul style="list-style-type: none"> <li>• Challenge: build a better life without compromising biodiversity and cultural endowments</li> <li>• Multiple active / established sectors to integrate:               <ul style="list-style-type: none"> <li>• Tourism; Agriculture &amp; bioprospecting; Cultural</li> </ul> </li> <li>• Access is a critical challenge – road infrastructure extremely poor and air access extremely expensive</li> <li>• Define new tourism markets and products that do not rely on travel infrastructure</li> <li>• Weave products into packages</li> <li>• Partnerships to draw investment and to market products (financial and in-kind)</li> <li>• Signage, information centres, environmental education NB!</li> </ul>	<ul style="list-style-type: none"> <li>• Rich historical, natural and cultural heritage</li> <li>• The province has MANY stories to tell - packaged &amp; made accessible</li> <li>• Partner with communities to showcase histories and traditions using movies / documentaries / homestays</li> <li>• Establish provincial cultural heritage information HUB</li> <li>• Awareness of historical archives, museums etc. Tour operators to include these in tourist packages</li> <li>• Possibilities for developing online virtual tours (so as to preserve historical and culturally sensitive areas)</li> <li>• Rich maritime history along Wild Coast</li> <li>• Consider a HERITAGE working group of the Provincial Tourism Forum</li> </ul>

The most recent stakeholder planning efforts involved a combination of focus group discussions and an online survey. The approach was consistent across formats, regardless of the topic identified as pertinent by the stakeholder(s):

- ECPTA sought to establish what stakeholders believe are the pressing issues relating to the topic to which they are responding
- Solicited input and suggestions for addressing these issues
- Encouraged stakeholders to identify their contribution (individual or organisation) to addressing the issues they raised

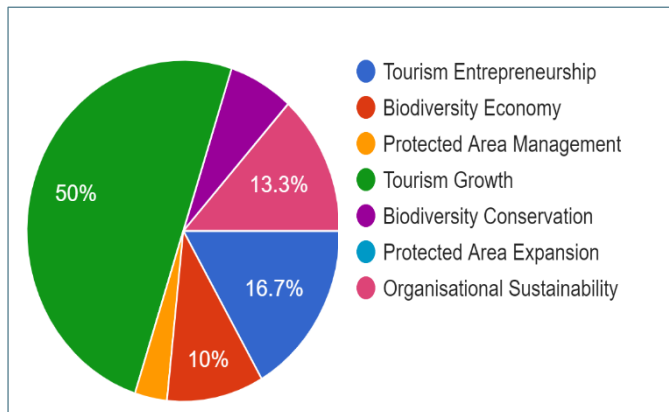


Figure 2: Area of interest as cited by respondents (ECPTA online survey July-August 2019)

Stakeholder planning engagement sessions took place between July and September 2019 across the Province. The organisations and individuals that participated in those sessions contributed significantly to both the situational analysis to which this plan responds, and to identifying the strategic themes of the five-year plan.

## Desktop research

In addition to actively engaging with stakeholders, the ECPTA consulted a wide range of published reports, journal articles, policy documents, evaluations, and predictions to ensure a comprehensive understanding of prevailing and anticipated conditions. Sources include, but were not limited to, StatsSA; the Department of Planning, Monitoring and Evaluation; Sustainable Livelihoods Foundation; Department of Environment, Forestry and Fisheries (DEFF); National Treasury; African Journal of Hospitality, Tourism and Leisure; The Latin America Travel Company; National Centres for Environmental Information; International Journal of the Commons; World Travel and Tourism Council; SA Tourism; United Nations Development Programme (UNDP); and the World Bank

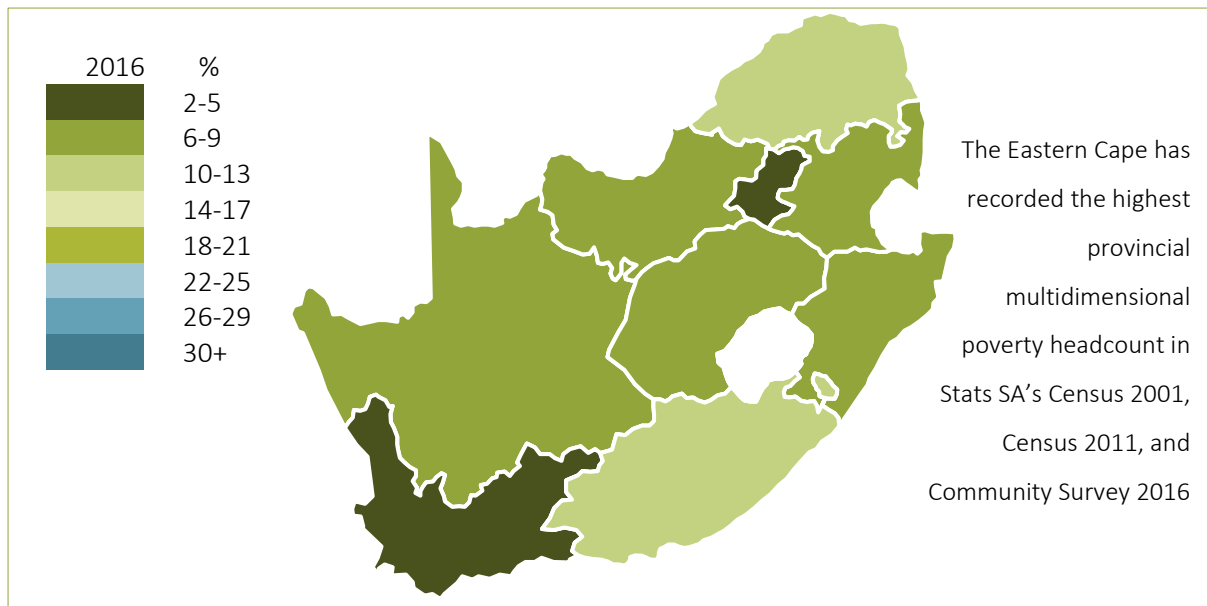
## External Environment Analysis

According to Stats SA's 2019 Mid-Year Estimates, 6.71 million people call the Eastern Cape home, constituting 11.4% of South Africa's population of 58.78 million. The province saw a net outward migration of over 350 000 citizens since 2016. The province has the highest child and elderly proportions, with 11.3% 60 years and older, and 33% 15 years or younger. The highest fertility rate in the country supports the higher-than-average proportion of children in the population.

## Provincial economic context

Statistics South Africa (StatsSA) released the "*Poverty Trends in South Africa: An examination of absolute poverty between 2006 and 2015*" report at the end of August 2017. According to the report, children (aged 17 or younger), females, Black Africans, people living in rural areas, those living in Eastern Cape and Limpopo, and persons with little or no education are most vulnerable to poverty.

These trends are summarised in the multidimensional poverty headcounts map hereunder.



Source: Community Survey 2016, Stats SA

The 2018 UNDP report on income inequality in sub-Saharan Africa indicates that 10 of the 19 most unequal countries in the world are African. In a context where South Africa ranks as the most unequal country in the world (with the highest Gini coefficient), the poverty of the Eastern Cape is both a constraint to development and a powerful motivator. This contextual perspective is highly relevant to ECPTA's work, and compounds both the urgency and complexity of the agency's mandate.

## Tourism's contribution to the economy

According to the Tourism Satellite Account for South Africa [final 2016 and provisional 2017 and 2018] published in November 2019, tourism contributed 2.7% to South Africa's gross domestic product (GDP) in 2018. The report further indicates that tourism accounted for 739 657 jobs, which equates to 4.5% of South Africa's employed individuals.

Understanding the characteristics of the sector provides the basis for forecasting:

- Nationally, leisure spending exceeded business spending by 28%
- Domestic spending made up 56% of the spend value

## Provincial tourism status

### *International tourism*

While the ECPTA's strategic focus is on developing the provincial tourism industry and increasing the province's domestic tourism footprint, marketing the province to the international market remains an important component of the Agency's work. Statistics for the past two years reveal that the Eastern

Cape has retained its eighth position (of nine provinces) with respect to the number of international visitors. While only 0.4 million of the 10.5 million international tourist arrivals in 2018 visited the Eastern Cape, this was a 6.1% increase on the previous year. Because international visitors tend to stay longer in the Eastern Cape than four of the other provinces, the province has maintained position seven for value (money) spent while visiting.

The core markets on which the ECPTA concentrates are the Benelux countries, Germany and the United Kingdom. Visitor growth from these countries was muted in 2018, while France and Italy showed positive growth. The biggest recorded growth was for visitors from China, although the 153% growth rate was off a very low base. Expansion into new international markets in support of SAT’s Strategy 2020-25 is therefore under consideration.

The World Economic Forum’s “Travel & Tourism Competitiveness Index for 2019” indicates that South Africa’s competitiveness has declined for 2 consecutive cycles, ranking 48<sup>th</sup> of 141 countries in 2015, 53<sup>rd</sup> of 136 countries in 2017, and 61<sup>st</sup> of 140 countries in 2019.

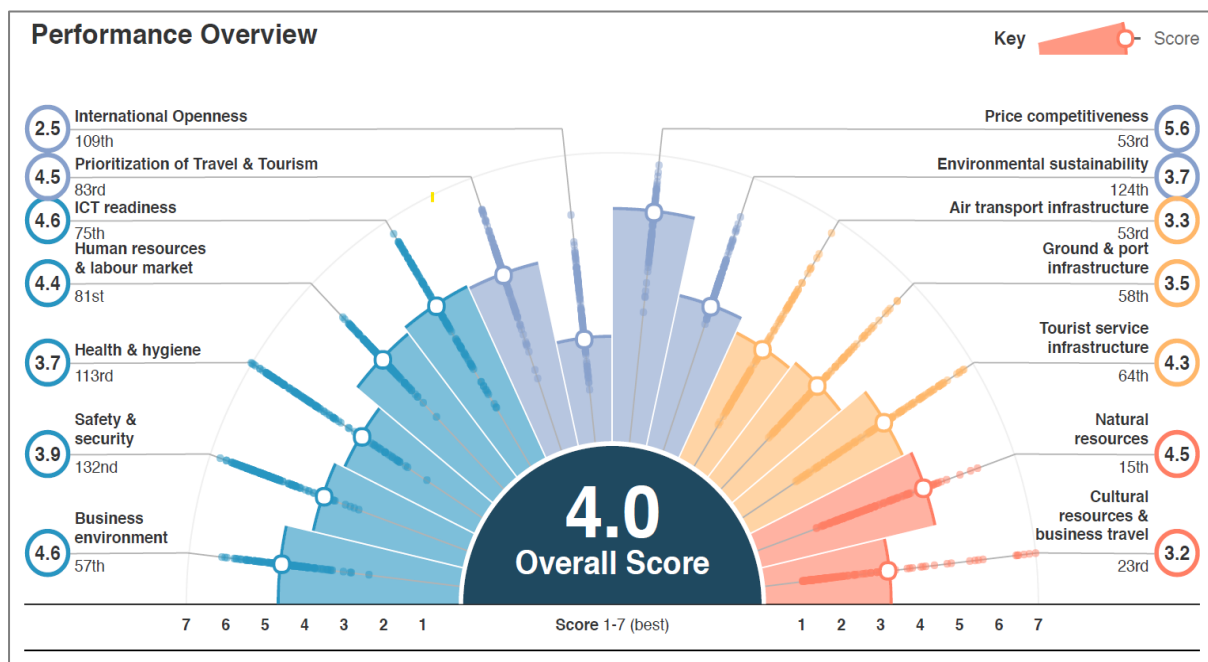


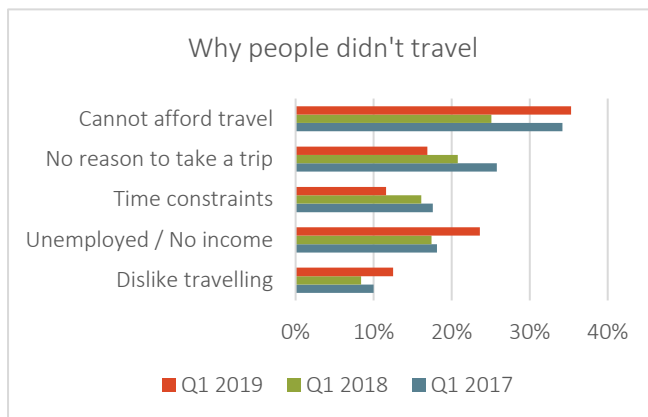
Figure 3: South Africa Travel & Tourism Competitiveness (Source: World Economic Forum (WEF\_TTCI\_2019\_Profile\_ZAF))

Assuming a correlation between national and provincial pictures, competitive strengths relate to “natural resources” and “cultural resources & business travel”. To facilitate competitiveness of the tourism sector globally, the World Economic Forum recognises that “Sub-Saharan Africa shows great untapped potential for natural tourism, which can be better utilized with more development and investment.” The decline in South Africa’s relative competitiveness requires urgent attention, investment and funding both nationally and provincially in order to exploit this “untapped potential”.

ECPTA’s dual mandate includes tourism and conservation. Historically, Marketing and Tourism, together, have received just under a quarter of the Agency’s annual budget, which equates to approximately 0.09% of the Provincial Equitable Share budget. The World Economic Forum’s Travel & Tourism Competitiveness Index for 2019 reports that the South African government allocates a mere 0.6% of the overall state budget to Tourism and Travel support. This spend level is indicative of the relatively low priority afforded travel and tourism funding, with South Africa ranked 136<sup>th</sup> of 140 countries in this regard, contributing to the weak performance against the “prioritisation of travel & tourism” pillar (83<sup>rd</sup> of 140). It is, however, significantly higher than the provincial allocation.

In contrast to these extremely low allocations, national and provincial planning processes, including the National Development Plan, the Provincial Development Plan and the recent discussion document titled “Economic transformation, inclusive growth, and competitiveness: Towards an Economic Strategy for South Africa” (Prepared by the Economic Policy unit of National Treasury), all point to tourism as a key growth sector. It is apparent that budgetary support for travel and tourism must accompany the prioritisation of tourism in the economy.

*Domestic tourism*



The graph indicates that the primary constraint to domestic travel is consistently affordability. In this context, the reasonable pricing and value for money at provincial nature reserves remains a key advantage that will receive sustained emphasis in coming years. This is, however, contingent on dramatically improved access to the province

with low cost flights and bus transport. At the 2019 World Tourism Day celebrations in KwaZulu-Natal, the Minister of Tourism, Mmamoloko Kubayi-Ngubane, set out plans to intensify efforts to grow the tourism sector. In heading this call, the province needs to do more to stimulate domestic tourism, and to leverage tourism to increase social cohesion.

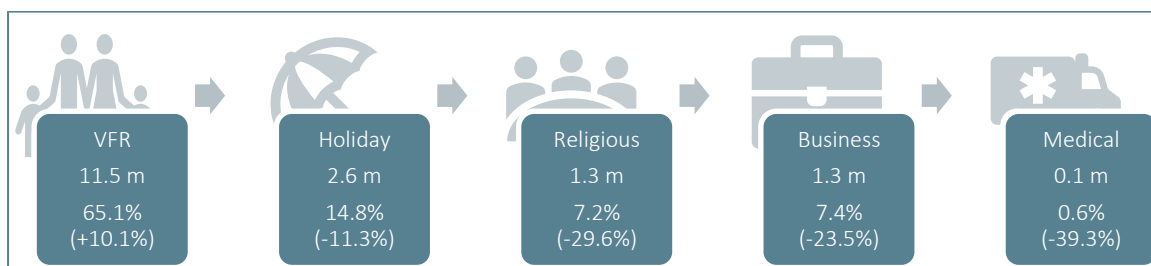


Figure 4: Number | proportion | (change) in domestic trips by purpose of travel (National)

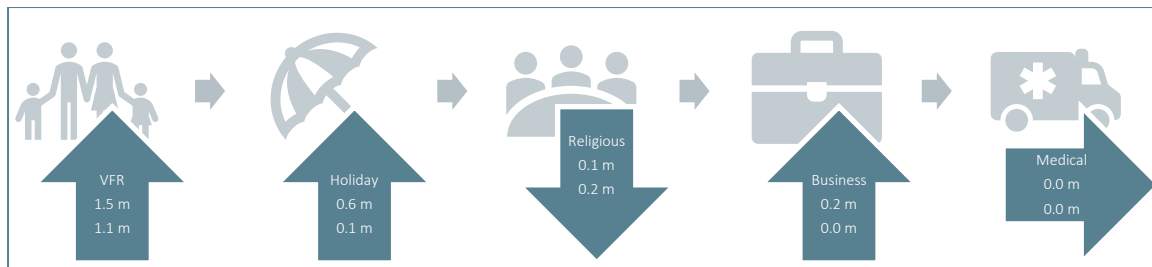


Figure 5: Number 2018 | Number 2017 of domestic trips by purpose of travel (Eastern Cape)

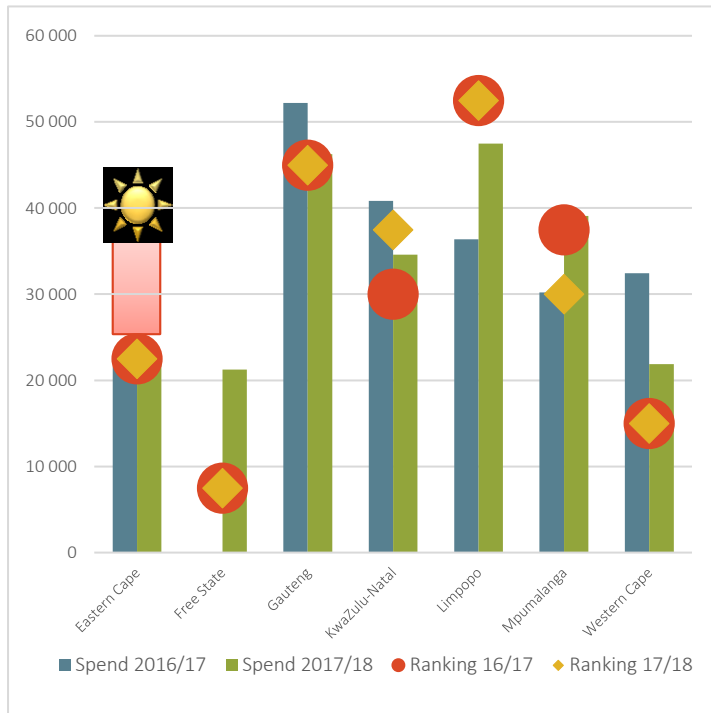
The dominant visit purpose over the past year remained VFR (visiting friends and relatives), which continues to account for over half of all visits from other provinces. The ECPTA intends to put emphasis on converting VFR visitors to holiday makers, despite the constraining economic conditions.

Stats SA reports that domestic visitors spent R100 billion more in 2017 than in 2005. Road transport consumes over a quarter of domestic tourists' spending, accounting for the highest proportion of spending every year since 2005. The Eastern Cape is distant from the source markets of Gauteng and Mpumalanga, making visits to the Province relatively expensive.



Figure 6: Spending trends of local visitors

The number of domestic visitors to the Eastern Cape increased to 2.323 million in 2018, having declined to 1.638 million in 2017. Compared to other provinces, the Eastern Cape slipped from fourth position in 2016 to fifth position for both the 2017 and 2018 years. Limpopo was the most visited province in 2018 with 3.295 million trips, around 900 000 more than to the Eastern Cape.



It is apparent that there is a direct correlation between what provinces spend on tourism marketing or promotion on one hand and domestic ranking on the other.

For the Eastern Cape to outdo KZN and Mpumalanga, and achieve the third place ranking originally planned, the Province would need to double the current budget.



	Desired 3rd place ranking
	Spending gap

Figure 7: Ranking achievement compared to tourism marketing budgets

In order to overcome the funding deficit, ECPTA increasingly relies on third party contributions and collaborations to drive tourism to the province.

*The Eastern Cape was the fifth most visited province in 2018. Put in perspective, the number of domestic tourism trips to the province increased by 41.8%, while visitors to the most visited province, Limpopo, declined by 35.7%.*

The extent to which this is sustainable is a question raised by both the Board of ECPTA and by SAT in their most recent performance report.

### Tourism Development

The tourism sector interlinks well with other sectors in the economy and is therefore an important driver of inclusive growth. Such growth, however, depends on the utilisation rate and uptake of tourism offerings. This requires that potential tourists and visitors are aware of these offerings, either by word-of-mouth or by active marketing.

It is obvious that marketers must have a viable product to market. The role of the ECPTA in developing tourism products in the Province is fundamental to providing the Destination Marketing function with substance to market. Established private tourism products are frequently graded, and able to invest in their own development and marketing. This is not necessarily the case for the emerging, community-based, and reserve-based products.

The ECPTA Act 2 of 2010 thus requires the Agency to focus on developing the tourism sector in the province. Transformation of the tourism industry is critical to the future success of the industry. Whilst a certain degree of organic growth in transformation will occur in the industry over time, some interventions are necessary to assist with the process. Transformation programmes seek to ensure that emerging enterprises owned by Previously Disadvantaged Individuals (PDIs) reach the mainstream of the sector through providing market access to SMMEs, providing tourism interventions / support to tourism associations and businesses, and preparing communities to leverage benefits from events held in their localities.

According to Minister Kubayi-Ngubane,

*“Tourism has been a pillar of our economy and under the current economic conditions it presents us with the best chance of increasing social inclusion. As we intensify our efforts to grow our tourism sector, and ensure that we leave no one behind, we need to do the following (amongst other things):*

*We need to adopt a whole of government approach to tourism so that there is consistency in the message that we send to the world at all levels of government*

*We need to create a tourism infrastructure coordination framework so that government investment in infrastructure at all levels is complementary*

*We need to crowd-in private sector investments in the tourism sector so that our tourism product offering can be diverse*

*We need to work closely with communities so that they can take ownership of projects within their localities and ensure that they maximise their benefits and that of the country as whole*

*We need to work together to transform the sector so that all South Africans can equitably participate in the sector including our disabled compatriots”*



## Provincial conservation status

### *Biodiversity*

South Africa is the third most biologically diverse country in the world, with high levels of endemism. With eight biomes, the Eastern Cape is the most biodiverse province, yet almost 90% of Eastern Cape vegetation types are “poorly protected”. Climate change will increasingly challenge biodiversity and ecosystem services. Unfortunately, the protected area system is inadequate to conserve the Eastern Cape’s internationally recognised natural capital. The protected area estate needs to expand.

ECPTA contributes, on behalf of the Eastern Cape Provincial Government, to the protection and conservation the province’s biodiversity while maximising the tourism potential of the protected area estate. ECPTA currently manages 579 089 hectares, including one World Heritage Site (at Baviaanskloof), and 171 666 hectares of marine space. This estate includes two internationally recognised biodiversity hotspots, namely the Cape Floristic Region and the Maputoland-Pondoland-Albany Centres of endemism. The ECPTA-managed estate also protects all eight of the biomes found in the Province.

### *Protected Area Expansion*

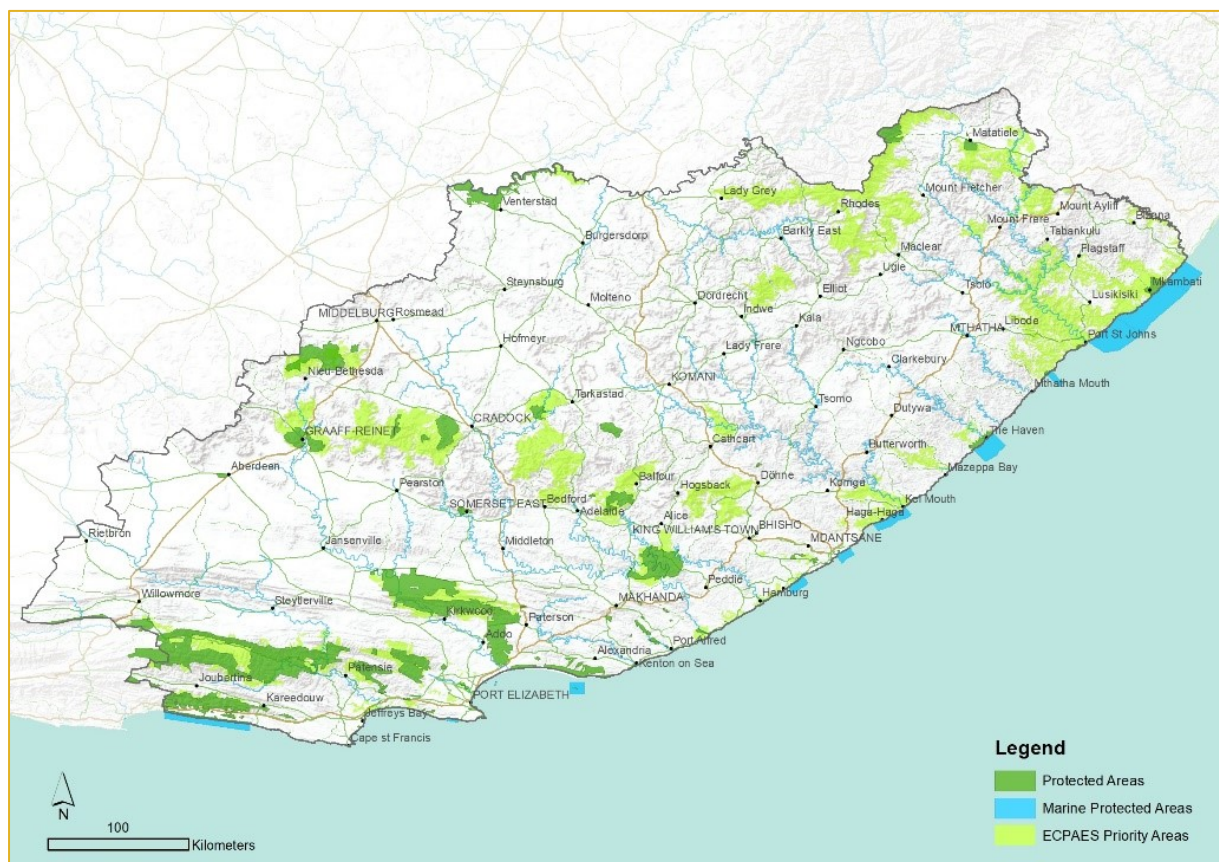


Figure 8: Eastern Cape Protected Area Expansion Strategy Priority Areas

The Eastern Cape's provincial conservation plan guides the provincial Protected Area Expansion Strategy (PAES). The focus is on areas that address the gaps in the level of protection of certain vegetation types and ecosystems. The identified priority areas represent a pragmatic set of implementation priorities that balance the need for development with the requirement to meet all conservation expansion targets.

According to the National Protected Area Expansion Strategy (2016), the main priorities in the Eastern Cape are Pondoland, Qhorha-Manubi, Greater Baviaanskloof, Katberg-Amathole, the East London Coast, the Sunshine Coast, the St Francis region, Mountain Zebra to Camdeboo National Parks, around Addo National Park and the North Eastern Cape interior grasslands. Key biodiversity features targeted are the Pondoland Centre of Endemism, the high value montane grasslands and forest mosaics of the Katberg-Amathole, the wetland complexes of Matatiele, remaining pockets of coastal forest and grassland, corridor areas of the Sneeuberg region, and the under-protected and unique grasslands of the Southern Drakensberg. Pressure on these priority areas emanate from commercial and subsistence agriculture, new forestry programs are an issue in the east, while coastal urban expansion threatens coastal areas. Mining and infrastructure projects are issues in some areas such as the Pondoland Centre of Endemism.

The ECPTA engages with private and communal landowners to develop partnerships to expand the conservation estate of the province. Through the willingness of private landowners to formally declare their land as Protected Environments or Nature Reserves, a total of 67 886.58 hectares were submitted to the Member of the Executive Council (MEC) in 2017/18. These were subsequently declared and officially added to the conservation estate of the Eastern Cape during 2018/19. A further 1 748.18 hectares were submitted to the MEC in 2018/19 towards declaration in 2019/20.

#### *Management of provincial reserves*

ECPTA is the designated management authority for all provincially declared nature reserves. As indicated in the map overleaf, the reserves for which ECPTA is responsible spread across the entire province. Given the mandate to preserve the Province's natural heritage, the reserves are predominantly rural and remote. The location of reserves poses challenges in respect of ensuring that tourists can access them safely and easily. In addition to addressing these concerns, ECPTA plans to enhance its strategy to establish commercially viable tourism activities on reserves.

The potential economic benefit of reserve-based activities for neighbouring communities is currently limited but is a primary concern of the Reserves as Products (RAP) approach. Biodiversity Economy initiatives are currently limited to game industry transformation, and a small Honeybush seedling site.

In terms of RAP, ECPTA has arranged its fifteen reserve groups into three clusters. The dominant activity type appropriate to each reserve determines in which cluster it is located. Attention to aligning clusters to existing tourism routes ensures that there is synchronicity, and that communities participating in tourism initiatives are easily absorbed into the tourism value chain of the area.

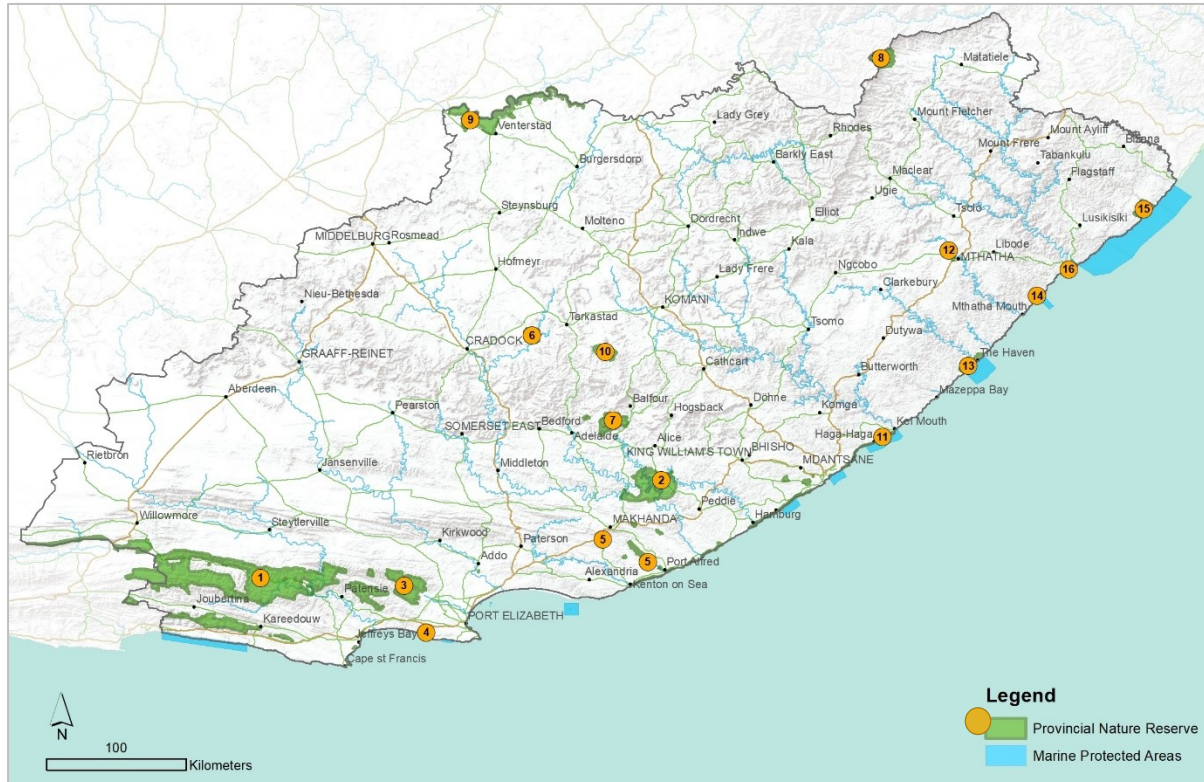


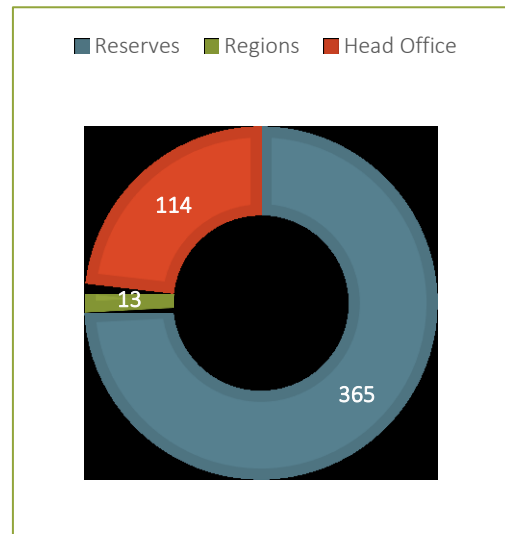
Figure 9: Location of Provincial Nature Reserves

Cluster	Niche	Reserves	Routes
<b>Biodiversity and Heritage</b>	Iconic reserves Opportunities for special interest and educational tourism	① Baviaanskloof ② Great Fish River ③ Groendal ④ Island ⑤ Thomas Baines & Waters Meeting	Kouga, Tsitsikama, Sundays River Valley, Karoo Heartland, Frontier Country
<b>Game Management and Recreation</b>	Offer market opportunities for hunting, holiday and special interest	⑥ Commando Drift ⑦ Mpofu / Fort Fordyce ⑧ Ongeluksnek ⑨ Oviston ⑩ Tsolwana ⑪ East London Coast (Double Mouth)	Amathole Mountain Escape, Friendly N6, Frontier Country, Sunshine Coast, Karoo Heartland
<b>Marine and Coastal</b>	Good fit with holiday visitors Opportunities for educational and recreational users	⑫ Nduli Luchaba ⑬ Dwesa Cwebe ⑭ Hluleka ⑮ Mkhambathi ⑯ Silaka	Wild Coast

## Internal Environment Analysis

### Capacity to deliver

Of the 629 posts in the ECPTA structure, 496 were filled as at the end of Quarter 2 of 2019/20. The majority of staff (74%) are employed on Reserves. 88% of the staff profile relates to the core mandate, with only 12% deemed to be support staff. Due to progressive real declines in equitable share allocations from 2018/19 onwards, the relative proportion of employee costs rises above the 60% target set by Treasury. This figure was at 50% in 2018/19 because of significant conditional grants from national government.

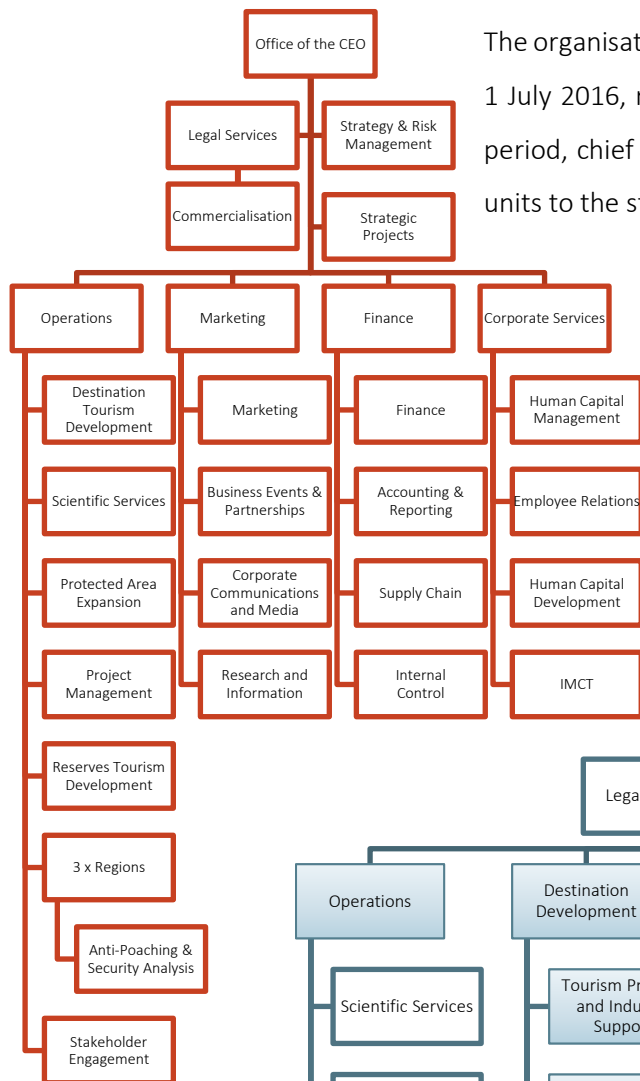


Conservation norms and standards recommend deploying one field ranger for every 1 500 ha under protection. In protected areas with highly vulnerable species, the norm increases to one field ranger for every 1 000 ha. The 148 field rangers currently employed represent only a third of the 450 ECPTA should ideally employ.

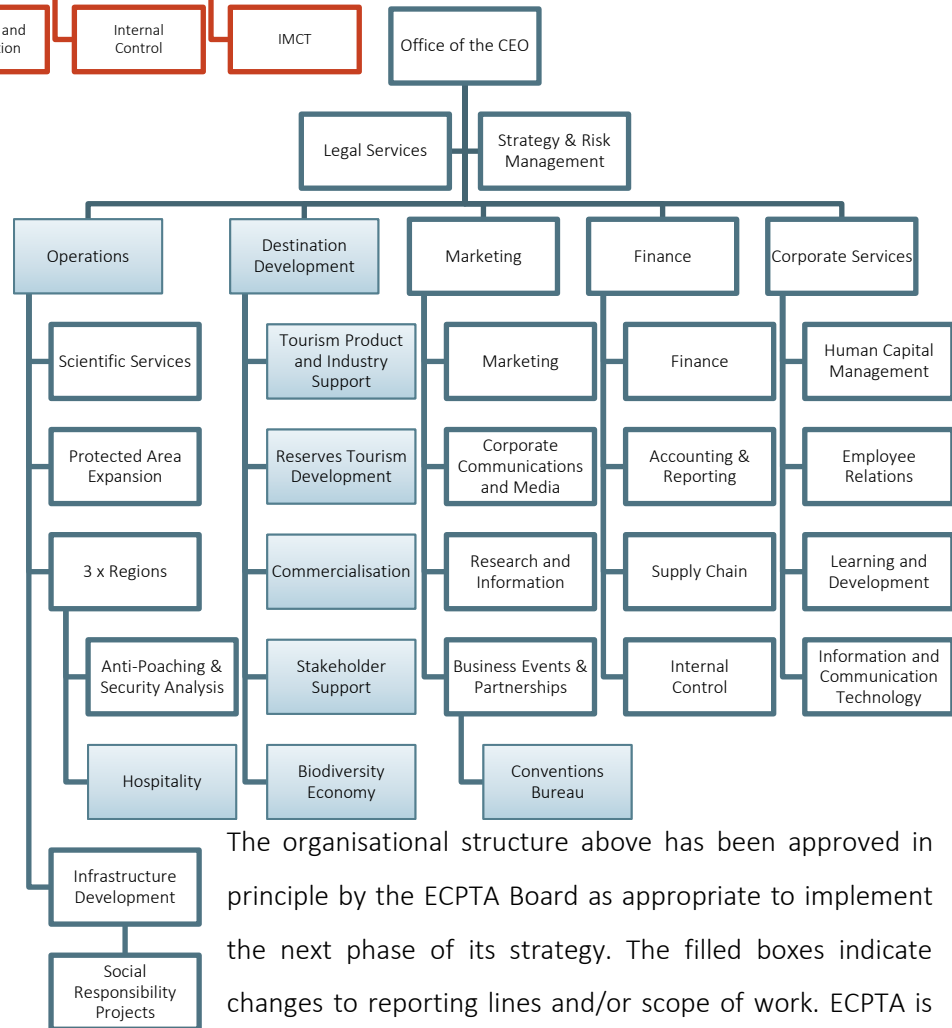
The current circumspection regarding the funding of vacant posts makes it unlikely that the ECPTA's organisational structure will reach full capacity over the coming MTSF period.

The gender mix of employees is a strong indication of the efforts undertaken by the ECPTA to open up the conservation sector. Despite this being a traditionally male domain, 44% of the agency's staff are female.

## Organisational structure



The organisational structure depicted on the left, in place since 1 July 2016, reflects the priorities of the 2015-2020 strategic period, chief among which was the realignment of functional units to the strategy.



The organisational structure above has been approved in principle by the ECPTA Board as appropriate to implement the next phase of its strategy. The filled boxes indicate changes to reporting lines and/or scope of work. ECPTA is mindful of the constrained fiscal environment and will implement the required organisational review with due restraint.

## Chronic underfunding of mandate

For the past number of years, Provincial Treasury have required that ECPTA add potential revenue from wildlife management, hospitality services and conditional grants to the indicative equitable share allocation before distributing its budget. This masks the actual shortfall. As a direct consequence of this practice, the agency’s baseline budget has shrunk in real terms.



Figure 10: South Africa Inflation Rate (April 2015 – September 2019)

ECPTA budget	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Equitable share	193 080	196 205	195 953	206 805	215 119	209 937	211 112	213 289
Total budget	269 500	260 160	240 977	327 042	409 580	295 607	277 090	293 716
ES proportion	71.6%	75.4%	81.3%	63.2%	52.5%	71.0%	76.2%	72.6%
Y-O-Y change		1.6%	-0.1%	5.5%	4.0%	-2.4%	0.6%	1.0%

ECPTA received an average allocation increase of 2.8% over the 2015/16 to 2019/20 strategic cycle. Over the same period, the mean inflation rate was 5.2%, and Treasury-mandated salary increases have hovered around 6%. To prevent diminishing budgets from undermining ECPTA’s mandated functions, the organisation has made compromises with the funding of corporate management support (CMS) functions. CMS absorbed most of the R9million budget decrease between 2015/16 and 2016/17. The ECPTA has exhausted the initial efficiencies gained through cost cutting. Further budget cuts will now begin to compromise transversal services, in turn putting mandated functions at risk.

*Had the baseline increased at the mean inflation rate of 5.2% per annum, the baseline allocation for 2020/21 would have been R248.7 million, compared to the R209.9 million in the indicative budget. Importantly, however, even an inflation-based increase would not have accommodated innovation or expansion over this period.*

Note that the increase in total budget in 2018/19 and 2019/20 was due to ECPTA's success in leveraging project-specific conditional grants and contracts, rather than an increase in equitable share (ES) allocation. This additional funding is vulnerable beyond the grant periods. In July 2019, the shareholder department communicated reduced ES allocations for 2020/21 to 2022/23 in line with the ES reductions announced by Treasury. The R11 million-plus reduction to the 2020/21 ES allocation will affect core (mandated) functions in numerous ways, potentially undermining successes achieved in the previous strategic period.

## Strategic risk management

The ECPTA utilises a risk-orientated approach to planning. The introduction of the Theory of Change approach to planning for the 2020/25 MTSF cycle has enhanced this approach, as the articulation of underlying assumptions exposes risks at the planning, rather than execution, phase of interventions.

The graphic below summarises the top five strategic risks identified for each year of the current MTSF cycle. It is evident that capacity constraints and intergovernmental co-operation have been the most consistent areas of risk.



### Technology-related risk

Over the past two years, the Agency has identified Information and cyber risk as its primary strategic risk. The Fourth Industrial Revolution (4IR) is under way. Technologies like Cloud Computing, Artificial Intelligence and Machine Learning are poised to facilitate improved innovation efforts in South African institutions. Considering this, ECPTA acknowledges that the Agency must prepare for the MTSF period

by modernising its marketing and communications platforms to keep pace with trends in the industry. ECPTA hopes to develop responsive, informative, relevant, and accessible digital platforms as a key driver of future success. The following observations inform the urgency of the digitalisation of the ECPTA's operations:

- Increasingly important to streamline and automate ECPTA's business and operational processes
  - Anti-poaching and general reserve management efforts will be enhanced
  - Cost reductions will be realised from improved efficiencies, including remote working and flexible working hours
  - Basic web-site linkages with municipalities, tourism products, community forums, safety and security structures, the Shareholder Department, and sister entities in the Province will improve availability and utility of information
  - Perpetual budget cuts mean that ECPTA must prioritise operations over administration and meetings (with attendant travel and accommodation costs). To mitigate the risk of becoming irrelevant due to absence and invisibility, it is critical that the Agency establishes a reliable video conferencing alternative
- Improve customer experience through provision of integrated platforms
  - Peer-to-peer marketplaces
  - Integrated booking systems
  - Curation and design of travel experiences
  - Connectivity on ECPTA reserves

ECPTA will need to understand the risks attendant to the digitalisation of processes and systems clearly and manage these from the outset. Most of these risks manifest as opportunities (expansion of marketing reach; increased transparency; improved reserve security...), but cyber vulnerabilities are constantly present. The ECPTA's success in navigating these risks will strongly influence the Agency's success in the 2020-25 strategic cycle.

The planning processes for the 2020-25 MTSF cycle allowed ECPTA to identify an additional set of emerging risks. These will be analysed and addressed through the existing risk management and operational processes. The lists on the next pages capture the assumed outcome of risk mitigation actions:



### Fiscal Environment

- Operational budgets are adequate to meet mandate
- Government and private sector crowd investment into reserves
- ECPTA has an adequate and reliable vehicle fleet
- Partnerships are a viable additional direct and in-kind source of funding
- ECPTA is clear on the return on investment for each partnership

### Economic Environment

- Shared economy viable
- Lobbying on key issues (airlift strategy, infrastructure etc.) is successful
- Scientific, Academic, Volunteer, and Education (SAVE) tourism is a viable new niche for the Eastern Cape
- Tourism plays an important role in transitioning the Province to a sustainable green economy

### Natural Environment

- Climate change will be addressed
- Environmental concerns are unifying – everybody cares about the future of the planet
- Priority research and monitoring needs have been correctly identified
- We can predict the response of complex ecological systems to management interventions
- Environment is the base for all engagement between government, university, industry and end user stakeholders
- Plastic and general waste management addressed

### Tourism sector

- ECPTA meets evolving visitor demand
- Tourism growth takes place in sustainable ways
- Global wildlife tourism continues to generate more revenue than illegal wildlife trade
- Enabling technologies are deployed to enhance visitor experiences

### Legislative Environment

- Decision-makers conversant with environmental issues

### Technological Environment

- Flexible and agile 4IR
- Technology-enabled travel is a feature of tourism in the Eastern Cape

### Socio-economic Environment

- Co-Management Committees are functional
- Co-management agreements deliver
- Credibility of stakeholders is strong
- Stakeholders are interested in collaboration
- Partners respectful of one another's capacity and role

### Human Resources / Organisational

- Organisational leadership is principled and value-driven
- Organisation is correctly structured (wired)
- Vacancies are filled
- Reserve personnel correctly skilled
- Staff have sufficient time to attend to both planned and opportune priorities
- Training is effective
- Staff progression plan leads to staff retention

### Political Environment

- Drivers of poaching managed internationally
- Safety and security issues are well under control
- ECPTA input to local and district IDP processes incorporated in municipal projects
- Management Authorities are involved in preparing settlement agreements

## B.4 Strategic Response

### Interpretation of SWOT analysis

Through intensive stakeholder engagement, analysis of past performance, and analysis of relevant trends, ECPTA identified internal strengths and weaknesses, and external opportunities and threats. These are the components of our SWOT analysis. In order to respond to this analysis convincingly over the 2020-25 strategic period, it is necessary to identify strategic options.

The TOWS matrix overleaf both presents a review of the SWOT and provides direction to the organisational strategy. The options with the greatest potential of success, for delivering significant benefits, or providing the foundation for sustainable change are in the “SO strategies” quadrant (in the centre of the matrix).

#### TOWS Matrix general strategic options

There are four categories of options derived from a TOWS matrix.

##### 1. Strengths and Opportunities (SO)

- Known as “maxi-maxi” strategies, these have the highest potential
- Use a strength to take advantage of an opportunity

##### 2. Weaknesses and Threats (WT)

- Referred to as “mini-mini” strategies, they have the least potential
- Attempt to minimize vulnerability to threats and weaknesses
- Defensive strategies focus on minimizing weaknesses and avoiding threats

##### 3. Strengths and Threats (ST)

- Maximizing a strength to minimize a threat
- Known as “maxi-mini” strategies

##### 4. Weaknesses and Opportunities (WO)

- These are “mini-maxi” strategies
- Use an opportunity to overcome a weakness

Interpretation of the overall SWOT analysis indicates that internal strengths outnumber critical internal weaknesses, and external environmental opportunities outweigh environmental threats. Retaining existing strengths, ECPTA’s strategy choices are likely to be conservative, tending towards aggressive, over the next period. The TOWS Matrix strategies identified overleaf are incorporated into and detailed in the Annual Performance Plan for the MTEF 2020/21 – 2022/23.

<p>INTERNAL</p>	<p><b>Strengths [S]</b></p> <ul style="list-style-type: none"> <li>S1. Fourth consecutive clean audit with achievement over 90% of all performance targets since mid-2016</li> <li>S2. Policies and processes well matured</li> <li>S3. Skills sets well matched to conservation and tourism mandates</li> <li>S4. Digital security networks for reserves</li> <li>S5. Increasingly positive reputation in public and state circles</li> <li>S6. Understanding of developmental mandate</li> <li>S7. Track record in leveraging resources off budget</li> <li>S8. 44% female staff compliment in a traditionally male environment</li> </ul>	<p><b>Weaknesses [W]</b></p> <ul style="list-style-type: none"> <li>W1. Asset base (fleet; tourism infrastructure; conservation infrastructure; etc.) too old to meet expectations</li> <li>W2. Vulnerable to negative public perception</li> <li>W3. Outmoded paper-based systems</li> <li>W4. High vacancy rate (almost 20%) that is mostly unfunded</li> <li>W5. Inadequate business management skills for partnerships and investment promotion</li> </ul>
<p>EXTERNAL</p> <p><b>Opportunities [O]</b></p> <ul style="list-style-type: none"> <li>O1. Shared objectives with widening range of stakeholders</li> <li>O2. Potential new travel and tourism markets</li> <li>O3. Commercialisation of activities to enhance beneficiation for communities</li> <li>O4. Digitalising business processes</li> <li>O5. Tourism entrepreneurship growing phenomenon</li> </ul>	<p><b>SO strategies</b></p> <ul style="list-style-type: none"> <li>S7O1: Establish and manage a panel of technical assistance to deploy in response to requests for support</li> <li>S3O2: Bring micro-packaging and route-planning services with diversified product offerings to scale</li> <li>S6O3: Priority implementation of the Reserves-as-Products strategy</li> <li>S5O1: Leverage stakeholders' technology and networks for campaigns</li> </ul>	<p><b>WO Strategies</b></p> <ul style="list-style-type: none"> <li>W3O4: Digitise routine processes across the organisation</li> <li>W5O5: Review organisational structure and job descriptions to meet demand</li> <li>W5O2: Establish ECPTA as a clearing house for intelligence on tourism matters for the Province</li> <li>W5O3: Review organisational structure and job descriptions to meet demand</li> </ul>
<p><b>Threats [T]</b></p> <ul style="list-style-type: none"> <li>T1. Increase in violent crime / perceptions of tourist vulnerability</li> <li>T2. Community tension stemming from issues outside of ECPTA control (incomplete land rights restitution processes, lack of service delivery and unmet expectations of government)</li> <li>T3. Ongoing fiscal pressures compromise key interventions such as reserve security &amp; commercialisation</li> <li>T4. Cybercrime</li> </ul>	<p><b>ST Strategies</b></p> <ul style="list-style-type: none"> <li>S5T1: Produce and distribute monthly "from the desk of the CEO" newsletter</li> <li>S6T2: With appropriate partners, support biodiversity-related entrepreneurial opportunities, such as tourism</li> <li>S5T1: Regular positive stories from citizens on social media</li> <li>S1T3: Sustain performance and audit status to continue to leverage resources</li> </ul>	<p><b>WT Strategies</b></p> <ul style="list-style-type: none"> <li>W3T3: Leverage savings obtained through digitisation of routine processes to offset underfunding in critical areas</li> <li>W2T1: Public service notices and signage in key locations</li> <li>W2T1: Expansion of points of interest / emergency numbers aligned to all products on Explore App</li> </ul>

## PART C: Measuring Our Performance

### C.1 Institutional Performance Information

#### Measuring the Impact

**Impact Statement** Inclusive economic growth supported by sustainable utilisation of natural resources

“Promote sustained, inclusive, and sustainable growth, full and productive employment and decent work for all” is Goal 8 of the United Nations’ Sustainable Development Goals (SDGs) – Agenda 2030

**Ultimate Outcome** Responsible conservation and tourism benefit current and future generations

Broadly defined, sustainability is “meeting the needs of the present generation without compromising the ability of future generations to meet their own needs”

#### Measuring Outcomes

Intermediate Outcome	Immediate Outcome Indicator	Baseline	Five-year target
Adaptive management of biodiversity sustains ecological services	Environmental sustainability supported by well-managed protected areas	None – new indicator	90% Score
Marginalised individuals and communities actively benefit from biodiversity and tourism	Tourism, eco-tourism and wildlife economy value chains and products prosper	None – new indicator	90% Score
The Province is the premier African destination connecting people to authentic experiences	The Eastern Cape is a competitive international and domestic tourism destination	None – new indicator	90% Score
Organisational sustainability supported by capable, ethical and responsive administration	Internal service models geared to meet the needs of core departments	Expanded scope – no baseline	90% Score

## C.2 Planned Performance over the Five-Year Planning Period

### Theory of Change

The impact towards which ECPTA contributes is inclusive economic growth supported by sustainable utilisation of natural resources.

The ultimate outcome that ECPTA strives to achieve is that responsible conservation and tourism benefit current and future generations.

The ECPTA’s founding legislation directs its dual mandate, which is to:

(i) Develop and manage protected areas

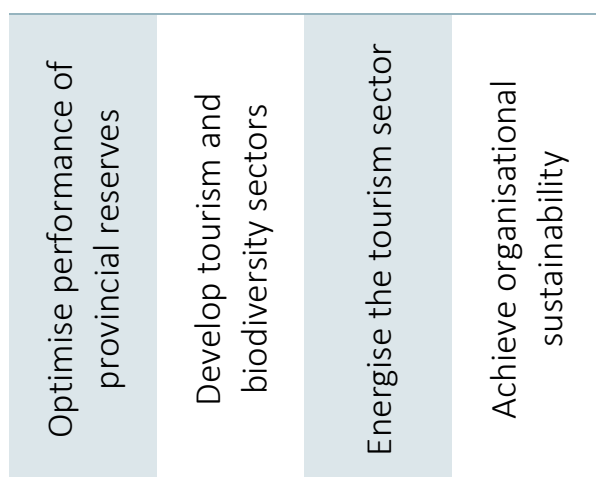
ECPTA is the management authority for the provincially declared protected areas. These are clustered into 15 management units or reserves, and include a World Heritage Site in the Baviaanskloof, as well as Marine Protected Areas. In all instances, the reserves are adjacent to or co-managed with local communities, which means that it is incumbent on the ECPTA to ensure that benefits of conservation accrue to those local communities also. Furthermore, the provincial protected area footprint is expanded through the stewardship programme. Site selection is informed by ecological priorities to sustain ecological services.

(ii) Promote and facilitate the development of tourism in the Province

ECPTA is the Destination Marketing Organisation for the province, and simultaneously supports emerging tourism products to become marketable. The Agency works with National, Provincial and Local tourism and marketing formations to offer tourists and visitors unforgettable opportunities to explore the Eastern Cape.

ECPTA sees the coincidence of climate change, depressed economic conditions, and a fresh commitment to service delivery as an opportunity to address its mandate priorities in a more integrated manner. The integration of three Pathways to Change is thus fundamental to the organisations’ 5-year Strategy.

The three pathways to change can be considered the pillars of the ECPTA 5-year strategy, supported by attention to organisational stability and excellence. The pillars of the strategy are thus to:



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## Assumptions informing the ECPTA Theory of Change

The following assumptions must be met for the ECPTA to achieve the outcome:

*Clean audit status and 90% performance record retained in support of achievement of mandated functions*

- The extent to which the Agency is seen as dependable is due in large measure to the reputation gleaned from its audit status
- The strong foundation should not be taken lightly, nor assumed to be unshakable
- Where necessary, policies and procedures must evolve further to establish the entity as a centre of excellence
- Operational plans must reflect stretch targets to give credibility to achievement of standards

*Internal service models are geared to meet the needs of core departments*

- The core departments require administrative, financial management and human capital management support in order to function optimally
- Digitisation / automation of standard human resource, procurement and reporting processes to improve efficiencies
- Professionalisation of support services by adopting existing industry standards where possible
- Surveys of user satisfaction will inform ongoing improvements

*Protected Area Management Plans (PAMPs) are implemented as prescribed*

- Conservation efforts on both public and private land are guided by scientifically sound protected area management plans
- Effective management of protected areas contributes to climate resilience
- Areas prioritised for expansion accommodate development while meeting conservation expansion targets

*ECPTA is clear on the Return on Investment for each partnership*

- Understanding that collaboration and partnership is essential to the achievement of the ECPTA's results, alliances must be built on a shared vision and based on common values
- The cost of collaboration must be clear to all parties throughout their relationship
- Compromising ECPTA's vision and values would impair the Agency's ability to deliver on its developmental mandate

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*Emerging products are at a marketable standard*

- The reputation of the Destination and the Agency are dependent on the quality of services rendered by tourism products across the value chain
- For the Destination Marketing Organisation (DMO) function to achieve success, the products it markets must be of a reliable, predictable standard
- The Destination Development Department will need to facilitate a pipeline of marketable products

*Tourist safety prioritised by all role players*

- A direct link has been drawn between tourist perceptions and the popularity of tourist destinations and attractions
- Not only must safety concerns be practically addressed, through visible policing and community awareness, for example, but steps will need to be taken to counter the tide of negative publicity
- Tourists will feel more at ease if basic contact information for local law enforcement is available in accommodations, if directional signage is reliable, if information is freely available, and if their concerns are speedily and effectively dealt with

*Plastic and general waste management addressed*

- The visual and psychological impact of waste-strewn towns and rural areas is a deterrent to tourism and undermines the Agency's conservation efforts
- The tourism sector is dependent on the environment for its survival; tourists do not visit environmentally ravaged destinations
- Clean up campaigns by an active citizenry will support the ethos of the Agency and Province

*Environmental concerns are unifying*

- There is currently a worldwide determination to achieve sustainable development, accompanied by growth in environmental awareness
- This combination of trends is not limited to disciplines concerned directly with the environment; they have, for example, found expression amongst tourism products, LTOs and DMOs who are under pressure to measure and mitigate their environmental impacts
- In the context of the ECPTA, this coincidence provides a strong binding purpose among work streams, departments and localities



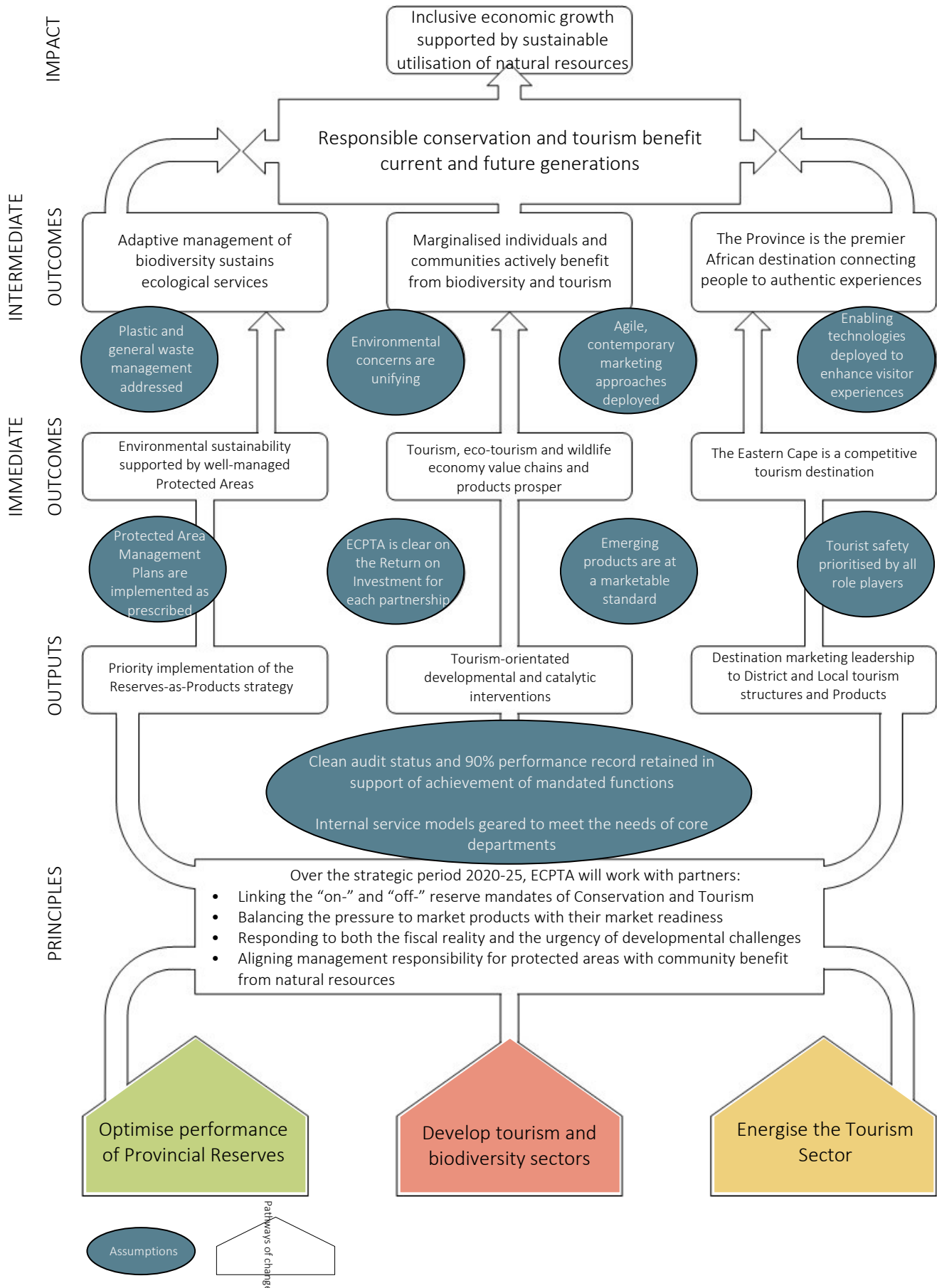
*Agile, contemporary marketing approaches deployed*

- In order to respond to the opportunities presented by millennials entering the tourism market, it is necessary to make use of marketing approaches that are appealing and familiar to a younger market
- While basic web-site linkages with municipalities, tourism products, community forums etc. will improve availability and utility of information, this will not interest tech-savvy travellers
- Social media will be increasingly important as a medium for marketing tourism products, routes, experiences and packages over the coming period

*Enabling technologies deployed to enhance visitor experiences*

- Integrated booking systems possible – to be investigated
- Connectivity on ECPTA reserves to be prioritised
- Improve customer experience through provision of integrated platforms
- Providing a knowledge gateway and communication platform for tourism stakeholders in the province
- Ordinary citizens = local brand ambassadors who showcase their own spaces

## Results Chain



## PART D: Technical Indicator Descriptions (TIDs)

### Outcome 1: Adaptive management of biodiversity sustains ecological services

Indicator Statement	Environmental sustainability supported by well-managed protected areas
Short title	Adaptive management
Definition	As the Protected Area Management Authority for the provincial declared protected areas, ECPTA is responsible for providing scientific input to conservation decisions, for facilitating the expansion of the protected area footprint to secure key ecological corridors, and for ensuring that tourist and conservation infrastructure on provincial reserves is appropriately developed and maintained
Source of data	Internally generated periodic progress reports
Evidence	Adaptive Management SCORECARD (with supporting evidence)
Method of Calculation / Assessment	Results of four weighted performance areas added together to give a score out of 100 25% for Biodiversity Decision Support 15% for Protected Area Expansion 35% PAMP implementation 25% Project Management progress
Assumptions	Adaptive management is practiced on all provincial protected areas and on stewardship sites There is a correlation between the practice of adaptive management and the sustainability of ecological services
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	The targeted zones for expansion of the protected area estate are located where gaps in the level of protection of certain vegetation types and ecosystems can be reduced
Calculation type	Average
Unit of measure	Score
Reporting Cycle	Quarterly
Desired performance	An average quarterly score of 90 or above is desirable
Indicator Responsibility	Executive Director: Conservation

## Outcome 2: Marginalised individuals and communities actively benefit from biodiversity and tourism

Indicator Statement	Tourism, eco-tourism and wildlife economy value chains and products prosper
Short title	Biodiversity economy value chains
Definition	<p>According to the National Biodiversity Economy Strategy, the wildlife industry is characterised by a combination of agriculture, eco-tourism and conservation features. A limited number of marginalised individuals and communities currently benefit from the biodiversity economy.</p> <p>Building the biodiversity economy in the Eastern Cape thus requires that ECPTA supports emerging participants to ensure that the demographics of the provincial game farming, tourism, and eco-tourism sectors are increasingly diverse. At the same time, the biodiversity economy will grow to the benefit of local communities if private sector operators utilise commercial opportunities on provincial reserves.</p> <p>ECPTA further facilitates stakeholders' contribution of resources and / or capacity to provincial tourism and conservation initiatives.</p>
Source of data	Internally generated periodic progress reports
Evidence	Value Chain SCORECARD
Method of Calculation / Assessment	<p>Results of four weighted performance areas added together to give a score out of 100</p> <ul style="list-style-type: none"> <li>30% for Tourism Value Chain Diversification</li> <li>20% for Reserves as Products</li> <li>25% for Biodiversity Economy</li> <li>25% for Stakeholder Support</li> </ul>
Assumptions	Support to potential participants improves the diversity of biodiversity economy value chains
Disaggregation of Beneficiaries (where applicable)	<p>Marginalised communities in the vicinity of provincial reserves</p> <p>Tendency towards support for women and youth</p>
Spatial Transformation (where applicable)	Rural Eastern Cape
Calculation type	Average
Unit of measure	Score
Reporting Cycle	Quarterly
Desired performance	An average quarterly score of 90 or above is desirable
Indicator Responsibility	Executive Director: Destination Development

## Outcome 3: The Province is the premier African destination connecting people to authentic experiences

Indicator Statement	The Eastern Cape is a competitive tourism destination
Short title	Tourism Competitiveness
Definition	<p>Tourism competitiveness for a destination relates to the destination's attractiveness for citizens and visitors, its ability to deliver quality, innovative, and attractive tourism services, and to gain domestic and international market share. While doing so, a competitive destination ensures that the available resources supporting tourism are used efficiently and in a sustainable way.</p> <p>As the Destination Marketing Organisation for the Eastern Cape, ECPTA contributes to the relative competitiveness of the Destination through brand positioning, digital marketing and public relations</p>
Source of data	<p>SAT periodic statistics</p> <p>StatsSA periodic statistics</p> <p>Internally generated comparative data</p>
Evidence	South African Tourism "TOURISM PERFORMANCE REPORT"
Method of Calculation / Assessment	Subtract the number of domestic holiday trips in 2018 from the number of domestic holiday trips reported in 2019
Assumptions	<p>Data available</p> <p>Collaborative efforts undertaken by ECPTA and partners result in increased numbers of domestic holiday trips to the destination</p>
Disaggregation of Beneficiaries (where applicable)	Tendency towards support for women and youth in tourism
Spatial Transformation (where applicable)	<p>Tourism Development initiatives from within ECPTA will seek to prepare marketable products and services in under-served but attractive locations</p> <p>Marketing efforts will seek to profile the destination as a whole</p>
Calculation type	Non-cumulative
Unit of measure	Number
Reporting Cycle	Annual
Desired performance	The higher the positive difference between 2018 and 2019 figures, the more competitive the destination is understood to be
Indicator Responsibility	Chief Marketing Officer

## Outcome 4: Organisational sustainability supported by capable, ethical and responsive administration

Indicator Statement	Internal service models geared to meet the needs of core departments
Short title	Organisational Sustainability Index
Definition	<p>Organisational Sustainability is the culmination of business practices that create long-term value by optimally responding to both opportunities and risks deriving from economic, environmental, and social developments</p> <p>While sustainable business practices are critical in an increasingly resource-constrained world, the systems and structures that support such practices must be constantly improving / maturing in order to retain organisational agility. Internal service models need to be geared to meet the needs of core departments</p>
Source of data	Internal analysis of source documents and reports generated in the course of doing business
Evidence	The portfolio of evidence for each dimension is set out in its accompanying operational plan. The information in the composite OSI scorecard is supported by the four (4) dimension scorecards
Method of Calculation / Assessment	<p>The Organisational Sustainability Index (OSI) is a summative scorecard of performance in respect of four performance dimensions, and all related operational indicators. The structure and content are derived from the 2019 Dow Jones Sustainability Index as tracked by RobecoSAM</p> <ul style="list-style-type: none"> <li>• 30% for Reputation Dimension</li> <li>• 35% for Financial Dimension</li> <li>• 20% for Social Dimension</li> <li>• 15% for Security Dimension</li> </ul> <p>The 4 weighted scores are added to arrive at a score out of 100</p>
Assumptions	Scorecard calculations are objective and credible
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	The corporate management support functions are accessible to staff across the province
Calculation Type	Average of quarterly OSI scores
Unit of measure	Score
Reporting Cycle	Quarterly
Desired performance	<p>The higher the score, the more sustainable the organisation</p> <p>An average quarterly score of 90 or above is desirable</p>
Indicator Responsibility	Chief Executive Officer

EASTERN CAPE  
PARKS AND TOURISM  
AGENCY

Strategic Plan

2020/21-2024/25

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