



LIMPOPO

PROVINCIAL GOVERNMENT
REPUBLIC OF SOUTH AFRICA

DEPARTMENT OF
ECONOMIC DEVELOPMENT, ENVIRONMENT & TOURISM



Limpopo **Tourism**

Growth Strategy



Table of contents

GLOSSARY OF ACRONYMS	4
DEFINITIONS	6
EXECUTIVE SUMMARY	7
1. INTRODUCTION	12
2. ORGANISATIONAL OVERVIEW	13
3. METHODOLOGICAL APPROACH	16
4. LIMPOPO - PROVINCIAL OVERVIEW	20
5. SITUATIONAL ANALYSIS	26
5.2 LEGISLATIVE AND POLICY CONTEXT	26
5.3 ORGANISATIONAL REVIEW - TOURISM BRANCH	34
5.4 KEY INSIGHTS FROM THE STAKEHOLDER CONSULTATIONS	41
5.5 MACRO-ECONOMIC ENVIRONMENT OVERVIEW	46
5.6 MARKET ANALYSIS	49
5.6.1 GLOBAL TOURISM OVERVIEW	49
5.6.2 KEY TOURISM TRENDS AND DEVELOPMENTS	50
5.6.4 TOURISM RECOVERY, GROWTH AND DEMAND SHIFTS	54
5.6.5 LIMPOPO'S CURRENT TOURISM PERFORMANCE	57
5.6.6 RELEVANCE OF TOURISM RECOVERY AND DEMAND SHIFTS	60
5.6.7 LIMPOPO TOURISM SUPPLY SIDE OVERVIEW	61
5.7 BENCHMARKING AND COMPETITION ANALYSIS	66
5.8 SWOT ANALYSIS	69
5.8.1 KEY INSIGHTS AND STRATEGIC IMPERATIVES	71
5.9 STEEP ANALYSIS	72
5.10 MARKET OPPORTUNITIES	73
5.11 STRATEGIC IMPERATIVES	75
6. TOURISM DEVELOPMENTAL CLUSTER REVIEW	77
6.3.1 FAMILY & RECREATION CLUSTER	79
6.3.2 SAFARI & HUNTING CLUSTER	81
6.3.3 SPORT & WILDLIFE CLUSTER	82
6.3.4 CULTURE & HERITAGE CLUSTER	84
6.3.5 BUSINESS EVENTS CLUSTER	86
6.3.6 SPECIAL INTEREST CLUSTER	87
6.3 STRATEGIC IMPLICATIONS	89
6.6 RECOMMENDED TOURISM CLUSTER FRAMEWORK (2026–2030)	95
7. TOURISM BENCHMARKING VALUE CHAIN	97
7.1 THE BENCHMARKING VALUE CHAIN APPROACH	97
7.2 BENCHMARKING VALUE CHAINS BY CLUSTER	98

7.3 ROUTE-BASED BENCHMARKING	99
7.4 KEY RECOMMENDATIONS	100
<u>8. TOURISM ROUTE DEVELOPMENT OPPORTUNITIES</u>	<u>101</u>
8.4.3 INSIGHT AND IMPLICATIONS.....	107
8.4.4 RECOMMENDED ROUTE DEVELOPMENT CATEGORIES.....	108
<u>9. NEWDOMESTIC TOURISM GROWTHAREAS</u>	<u>109</u>
9.1 KEY DOMESTIC TOURISM TRENDS INFLUENCING LIMPOPO	109
9.2 PRIORITY DOMESTIC TOURISM GROWTH AREAS.....	110
9.3 IMPLICATIONS.....	111
<u>10. MARKETING AND BRAND STRATEGY FRAMEWORK</u>	<u>112</u>
10.1 STRATEGIC DIRECTION.....	112
10.2 GOALS AND OBJECTIVES	113
10.3 CRITICAL SUCCESS FACTORS.....	114
<u>11. STAKEHOLDER ENGAGEMENT AND PARTNERSHIP FRAMEWORK</u>	<u>125</u>
<u>12. KEY ISSUES AND PRIORITIES</u>	<u>127</u>
<u>13. STRATEGY</u>	<u>129</u>
13.1 VISION	129
13.2 MISSION	129
13.3 CORE VALUES	129
13.4 GUIDING PRINCIPLES	130
13.5 STRATEGIC GOALS.....	130
13.6 INTERVENTIONS AND ENABLERS.....	132
<u>14. STRATEGIC IMPLEMENTATION</u>	<u>138</u>
14.1 IMPLEMENTATION PLAN	138
14.2 RECOMMENDED HIGH LEVEL PROVINCIAL TARGETS.....	141
14.3 MONITORING AND EVALUATION PLAN	143
14.4 RISK AND MITIGATION STRATEGIES	145
REFERENCE LIST.....	147
ANNEXURE 1: RECOMMENDED INTERVENTIONS BY DISTRICT	154
1. CAPRICORN DISTRICT	155
2. MOPANI DISTRICT.....	156
3. SEKHUKHUNE DISTRICT	157
4. VHEMBE DISTRICT.....	158
5. WATERBERG DISTRICT	159
<u>ANNEXURE 2: LIMPOPO PROVINCE FIVE-YEAR RESULTS FRAMEWORK.....</u>	<u>161</u>

Glossary of Acronyms

AA News	–	Anadolu Agency News
AfCFTA	–	African Continental Free Trade Area
ANC	–	African National Congress
AU	–	African Union
BASA	–	Bilateral Air Services Agreement
BBBEE / B-BBEE	–	Broad-Based Black Economic Empowerment
BICC	–	Bingu International Convention Centre
CE / BCE	–	Common Era / Before Common Era
DDM	–	District Development Model
DFFE	–	Department of Forestry, Fisheries and the Environment
DoT	–	Department of Tourism
ESG	–	Environmental, Social and Governance
GAIN	–	Growth, Acceleration and Inclusion Framework
GDP	–	Gross Domestic Product
GNU	–	Government of National Unity
HLPF	–	High-Level Political Forum on Sustainable Development
ICASA	–	Independent Communications Authority of South Africa
ICCA	–	International Congress and Convention Association
ICT	–	Information and Communication Technology
IDP	–	Integrated Development Plan
KPI	–	Key Performance Indicator
LDPWRI	–	Limpopo Department of Public Works, Roads and Infrastructure
LED	–	Local Economic Development
LEDET	–	Limpopo Department of Economic Development, Environment and Tourism
LTA	–	Limpopo Tourism Agency
M&E	–	Monitoring and Evaluation
MDG	–	Millennium Development Goals
MFMA	–	Municipal Finance Management Act
MICE	–	Meetings, Incentives, Conferences and Exhibitions
MTDP	–	Medium-Term Development Plan
NDP	–	National Development Plan
NEPAD	–	New Partnership for Africa's Development
NRDMP / TRDMP	–	National / Tourism Route Development Marketing Plan

NTSS	–	National Tourism Sector Strategy
OECD	–	Organisation for Economic Co-operation and Development
PFMA	–	Public Finance Management Act
PPP	–	Public–Private Partnership
RAL	–	Roads Agency Limpopo
RIA	–	Research ICT Africa
SAATM	–	Single African Air Transport Market
SAT	–	South African Tourism
SDF	–	Spatial Development Framework
SDGs	–	Sustainable Development Goals
SITE	–	Society of Incentive Travel Excellence
SMME	–	Small, Medium and Micro Enterprise
SOE	–	State-Owned Enterprise
SPLUMA	–	Spatial Planning and Land Use Management Act
StatsSA	–	Statistics South Africa
STR	–	Smith Travel Research (Hotel Data Analytics)
TFCA	–	Transfrontier Conservation Area
TGS	–	Tourism Growth Strategy
TSMP	–	Tourism Sector Master Plan
UN	–	United Nations
UNTOURISM	–	United Nations Tourism
VFR	–	Visiting Friends and Relatives
WTTC	–	World Travel & Tourism Council

Definitions

Domestic Overnight Trips: Domestic trips where tourists spend at least one night away from their usual place of residence, which are at least 40km, one way, but visited less frequently than once a week (unless for leisure purposes). These trips must not have been for relocation and remuneration purposes.

Domestic Overnight Spend: The total amount of money during an overnight stay at a destination, including accommodation, food, transportation, and activities.

Average Spend: The average spend refers to the mean amount of money spent by a specific group of individuals over a set period. For domestic tourism, it would be the total amount of money spent by all domestic tourists, divided by the number of trips.

Domestic Day Trips: Domestic trips outside of the tourist's usual environment, which are at least 40km, one way, but visited less frequently than once a week (unless for leisure purposes). These trips must not have been for relocation and remuneration purposes, and the tourist returns to their place of residence on the same day.

Domestic Day Spend: The total amount of money spent by domestic tourists during a day trip, including expenditures on transportation, food, and activities.

Domestic Tourists: Residents of a country who travel to and stay in places within their own country for leisure, business, or other purposes.

Geographic Spread: Domestic tourists' distribution and movement patterns across different regions or provinces within a country.

Bed nights: The total number of nights spent in accommodation by domestic tourists.

Length of Stay: The number of nights a domestic tourist spends at a destination during their trip.

Location Quotient: The comparison of a sector's share of a region's economy to the same sector's share of the national economy

Main Destination Province: A tourism trip's main destination province is the place visited that is central to the decision to take the trip.

Origin / Source Province: The province or region where domestic tourists reside before embarking on their trip.

Main Purpose: The purpose in the absence of which the trip would not have been taken.

Business Travel/MICE trips: Domestic trips undertaken primarily for work-related purposes, including meetings, conferences, and business exhibitions.

VFR (Visiting Friends and Relatives): Domestic trips undertaken primarily to visit friends or family, rather than for leisure, business, or other reasons.

Holiday/Leisure Trips: Domestic trips undertaken primarily for leisure or vacation purposes, excluding trips for business or other reasons.

Definitions

The Limpopo Tourism Growth Strategy (LTGS) 2026–2030 provides the strategic framework to guide the sustainable growth, competitiveness and transformation of the tourism sector in Limpopo Province over the next five years. Developed for the Limpopo Department of Economic Development, Environment and Tourism (LEDET), the Strategy responds to a changing global tourism environment and the need to position tourism as a central driver of inclusive economic growth, rural development and employment creation in the province.

Tourism has long been recognised as one of the sectors with the greatest potential to stimulate economic diversification and job creation in Limpopo. The province possesses an exceptional combination of wildlife landscapes, cultural heritage, archaeological resources, biosphere reserves and cross-border conservation areas that collectively position it as one of South Africa's most distinctive tourism destinations. These assets are reinforced by Limpopo's strategic geographic location as South Africa's northern gateway to the Southern African Development Community (SADC), bordering Botswana, Zimbabwe and Mozambique.

Despite this strong asset base, the province has not yet fully realised the economic potential of tourism. Structural challenges such as infrastructure constraints, fragmented governance arrangements, uneven product development and limited destination marketing have constrained the growth and competitiveness of the sector. The LTGS 2026–2030 addresses these challenges through a results-oriented strategy designed to increase visitor numbers, expand tourism spending, strengthen institutional coordination and ensure that tourism growth contributes meaningfully to inclusive economic development across the province.

The Strategy establishes a practical implementation framework that aligns tourism development with national and provincial economic priorities, strengthens collaboration between government and industry stakeholders and introduces measurable targets to guide delivery over the implementation period.

Strategic Context

Global Tourism Trends and Implications

The global tourism industry has undergone significant change in recent years. International travel has recovered strongly following the COVID-19 pandemic, but the sector is now shaped by new demand patterns, technological transformation and increasing expectations around sustainability and authenticity.

Travellers are increasingly motivated by immersive experiences that combine nature, culture and meaningful engagement with local communities rather than conventional sightseeing. Destinations that can offer authentic, place-based experiences are therefore well positioned to benefit from these shifts in demand.

At the same time, the global tourism environment remains influenced by economic and geopolitical uncertainty. Rising fuel costs, inflationary pressures and international conflicts have increased travel costs and affected airline connectivity and travel patterns. These conditions highlight the importance of regional and domestic tourism markets as stabilising forces during periods of global volatility.

Within South Africa, tourism continues to be recognised as a priority sector for economic development and employment creation. National policy frameworks position tourism as a catalyst for rural development, transformation and investment attraction. The Limpopo Tourism Growth Strategy aligns closely with these priorities while addressing the province's specific developmental opportunities and challenges.

Limpopo's Economic and Tourism Context

Limpopo Province plays an important role within the national economy as a major producer of minerals and agricultural commodities and as a key regional trade and logistics hub. The province also possesses a rich cultural heritage and diverse natural landscapes that underpin its tourism potential.

The provincial economy is characterised by a combination of resource-based industries and expanding service sectors. Mining remains the dominant economic activity, supported by agriculture, manufacturing, logistics and trade. Tourism contributes to economic diversification by supporting employment, stimulating small business development and promoting rural economic activity.

Limpopo's demographic profile presents both challenges and opportunities. The province has one of the youngest populations in the country and a significant proportion of residents living in rural communities. Tourism therefore has an important role to play in supporting youth employment, entrepreneurship and community-based economic development.

Administratively, Limpopo comprises five district municipalities: Capricorn, Mopani, Vhembe, Sekhukhune and Waterberg. Each has its own distinct economic and tourism characteristics.

Capricorn District serves as the provincial administrative and commercial centre, anchored by Polokwane and its associated services and logistics infrastructure. Mopani District is a major agricultural region and includes important sections of the Kruger National Park, making it a key tourism destination. Vhembe District is characterised by cross-border trade, agricultural production and significant cultural heritage resources. Sekhukhune District is strongly influenced by mining activities but also presents emerging tourism opportunities. Waterberg District contains some of the province's most important conservation landscapes, including the Waterberg Biosphere, and is widely recognised as a flagship eco-tourism region.

Together, these districts form a diverse tourism landscape with opportunities for wildlife tourism, heritage tourism, cultural tourism and rural tourism development.

Key Findings from the Situational Analysis

The preparation of the Limpopo Tourism Growth Strategy was informed by a comprehensive situational analysis that examined the macro-economic environment, tourism market trends, stakeholder perspectives and the province's current tourism performance.

Implementation and Governance Challenges

Stakeholder consultations across all five districts revealed that the previous Tourism Growth Strategy adopted in 2018 was not implemented as originally intended. Limited awareness of the strategy at district and local levels contributed to weak ownership and poor alignment with municipal planning processes.

Participants consistently identified governance weaknesses, limited coordination between departments and the absence of a structured monitoring framework as major constraints to implementation. These challenges resulted in fragmented interventions and limited the ability of the strategy to translate policy objectives into measurable outcomes.

Infrastructure and Accessibility Constraints

Infrastructure deficiencies remain a significant barrier to tourism growth. Poor road conditions, inadequate signage, limited maintenance of tourism facilities and restricted air connectivity reduce accessibility and negatively affect visitor experience.

Recent flooding events in parts of the province further highlighted vulnerabilities in infrastructure resilience and emphasised the need for improved disaster preparedness and climate-adaptation measures within tourism planning.

Destination Marketing and Visibility

The analysis also highlighted weaknesses in Limpopo's destination positioning and marketing visibility. Although the province possesses world-class tourism assets, these are not consistently promoted through a coherent destination brand or integrated marketing strategy.

Digital visibility remains limited and tourism clusters and routes are not fully integrated into destination marketing campaigns. As a result, Limpopo faces strong competition from other provinces for both domestic and international tourism markets.

Product Development and Tourism Clusters

Limpopo's tourism offer is currently structured around six tourism clusters: Family and Recreation, Safari and Hunting, Sport and Wildlife, Culture and Heritage, Business Events and Special Interest Tourism.

While these clusters remain relevant, their development has been uneven and requires refinement to better reflect evolving market demand. Limited product diversification and weak packaging of tourism experiences reduce visitor spending and length of stay.

Underdeveloped Tourism Segments

Several tourism segments remain underdeveloped despite strong growth potential. These include business events and incentive travel, religious tourism, wellness tourism, adventure tourism and township or rural tourism.

Developing these segments represents an important opportunity to diversify the tourism economy, extend visitor stays and increase economic benefits for local communities.

Market Opportunities

Global tourism trends present significant opportunities for Limpopo. The growing demand for nature-based tourism aligns strongly with the province's wildlife reserves, biosphere landscapes and conservation areas. Limpopo's biodiversity, wilderness landscapes and outdoor recreation opportunities position it well to benefit from increasing interest in nature and adventure tourism.

There is also rising demand for authentic cultural experiences and community-based tourism. Visitors increasingly seek meaningful engagement with local communities, cultural heritage and traditional knowledge systems. Limpopo's cultural diversity provides a strong foundation for expanding these experiences.

The global business events sector represents another important opportunity. Corporate retreats, incentive travel and small-scale conferences increasingly seek destinations that combine professional meeting facilities with distinctive leisure experiences. Limpopo's conservation landscapes and heritage environments provide attractive settings for such events.

In addition, the rise of remote work and lifestyle-driven travel creates opportunities for longer-stay tourism in safe, nature-rich environments. Limpopo's biosphere regions and conservation estates are well suited to this emerging market segment.

Strategic Direction

Recommended Strategic Focus and Interventions

The Limpopo Tourism Growth Strategy establishes a strategic framework to guide tourism development between 2026 and 2030. The overall objective is to increase the volume, value and sustainability of tourism while strengthening competitiveness and inclusivity.

A central priority is to strengthen Limpopo's destination positioning through a clear and consistent brand identity anchored in wildlife, cultural heritage and authentic rural experiences. A unified marketing programme supported by improved data systems and digital marketing capabilities will enhance market visibility and conversion.

The Strategy also prioritises tourism product development through the strengthening of tourism clusters and the development of new tourism routes. These initiatives will connect attractions, encourage longer visitor stays and promote the geographic dispersal of tourism benefits.

Inclusive economic participation is another key focus. Tourism development must expand opportunities for small tourism enterprises, community-based tourism initiatives and youth entrepreneurship. Supporting local participation will ensure that tourism growth contributes directly to poverty reduction and economic empowerment.

Improving infrastructure and access is identified as a critical enabler of tourism growth. Strategic investment in roads, signage, airports and digital connectivity will enhance accessibility and strengthen investor confidence.

Finally, the Strategy emphasises improved governance and implementation capacity. Strengthening institutional coordination, clarifying roles and responsibilities and establishing a robust monitoring system will ensure that strategic priorities translate into measurable results.

Implementation Framework

The LTGS 2026–2030 is designed as an implementation-focused strategy supported by clear targets, defined institutional responsibilities and a results-based monitoring system.

The implementation framework emphasises collaboration between provincial government, municipalities, tourism industry stakeholders and community organisations. Strengthened



governance arrangements will support coordination across departments responsible for tourism, infrastructure, safety and economic development.

District-level planning will play an important role in translating provincial priorities into local initiatives. Tourism development programmes will be aligned with municipal Integrated Development Plans and Spatial Development Frameworks to ensure coherence and efficient resource allocation.

The strategy also emphasises the importance of partnerships with the private sector and local industries. Collaboration with mining companies, agricultural enterprises and community organisations can unlock additional investment and support the development of tourism infrastructure and products.

Monitoring and evaluation systems will track progress against defined targets for tourism arrivals, visitor expenditure, product development and employment creation. Regular reporting will ensure accountability and enable adaptive management during the implementation period.

Conclusion

The Limpopo Tourism Growth Strategy 2026–2030 positions tourism as a central pillar of the province's economic transformation and inclusive growth agenda. While Limpopo possesses exceptional tourism assets, unlocking their full potential will require stronger governance, improved infrastructure, enhanced marketing and more coordinated product development.

By strengthening destination positioning, investing in tourism routes and experiences, supporting community participation and improving institutional coordination, Limpopo can significantly increase the economic contribution of tourism over the next five years.

Successful implementation of the strategy will position Limpopo as one of Southern Africa's leading nature and heritage tourism destinations while creating sustainable economic opportunities for communities across the province.

1. Introduction

Tourism Growth Strategy has long served as a key instrument for guiding the sustainable and coordinated development of destinations. Traditionally, it provides a long-term framework that integrates supply and demand factors, aligns stakeholders around a shared vision, and prioritises investment and governance actions that balance economic growth with environmental and social sustainability. The Limpopo Department Economic Development Environment (LEDET) has embarked on a process of reviewing the provinces' Tourism Growth Strategy 2018, with a view to developing a new growth strategy.

However, since the adoption of the Revised 2018 Limpopo Tourism Growth Strategy, the global tourism environment and the province's own developmental context have evolved substantially. The COVID-19 pandemic, shifting traveller behaviour, digital transformation, and the rising focus on sustainability and climate resilience have reshaped both opportunities and constraints. At the same time, the implementation of the previous Growth Strategy faced notable challenges: weak institutional coordination, limited stakeholder ownership, fragmented governance, and the absence of measurable performance indicators. These weaknesses reduced the plan's ability to translate policy intent into tangible outcomes and to adapt dynamically to changing market realities.

The 2018 Plan has had some key successes, though these include:

- 294 Tourism businesses were supported through the National Tourism Relief Fund with a national budget allocation of R200 m;
- 428 Tourism beneficiaries were supported through the Limpopo Tourism Relief Fund with a budget allocation of R10m. Beneficiaries were comprised of tourism accommodation, hospitality & related services, travel & related services, tourist guides, professional hunters, tourism grading assessors, government-supported community-owned tourism projects; and
- 155 Tourist Guides were supported through the National Relief Fund for Tourist Guides with a total budget of R697 500.

A **Tourism Growth Strategy** provides a new, more agile and accountable framework for tourism development. It is defined as a coordinated set of programmes and interventions aimed at growing the volume, value, and sustainability of tourism while strengthening competitiveness, inclusivity, and resilience. Unlike traditional master plans, it adopts a five-year, results-driven approach that emphasises measurable outcomes, investment prioritisation, and collaborative delivery mechanisms. The formulation of such a Growth Strategy typically follows a structured methodology that includes a situational and policy analysis; stakeholder consultation; development of a strategic framework and action plan; alignment with institutional and budgetary structures; and the establishment of a monitoring, evaluation, and learning system. This process ensures that the resulting strategy is evidence-based, participatory, and implementation-focused — providing a practical blueprint for accelerating growth and improving institutional efficiency across all spheres of government. Critically, a growth strategy lays emphasis on market driven growth objectives, interventions and strategic projects.

The Limpopo Tourism Growth Strategy development process coincided with a period of severe flooding in Limpopo Province, which caused significant infrastructure damage and disrupted access to key tourism destinations. These events exposed weaknesses in local infrastructure and emphasized the need for resilient access routes to support tourism and investor confidence. As a result, the Strategy now focuses on enhancing infrastructure resilience, disaster risk management, and incorporating climate considerations into tourism planning to

aid recovery and strengthen the long-term sustainability of Limpopo's tourism sector. Additionally, the strategy review and development process coincided with a period of geopolitical conflict in the Middle East with potentially significant implications for fuel price increases, inflationary pressures and a slowdown in travel from the affected markets.

2. Organisational Overview

The Limpopo Department of Economic Development, Environment and Tourism (LEDET) is the provincial engine tasked with shaping a competitive, inclusive, and sustainable economy. Guided by its mission “to create and facilitate the development of a competitive economy, sustainable environmental management, and tourism development towards an improved quality of life for all,” the Department occupies a uniquely integrated mandate that positions it at the centre of Limpopo's long-term growth trajectory.

Constitutional and Legislative Mandate

LEDET derives its authority from the Constitution of the Republic of South Africa (1996), which entrusts provinces with concurrent responsibility for key economic, environmental, and tourism functions. Section 24 of the Constitution affirms every citizen's right to an environment that is not harmful to health or well-being, and obliges the state to secure ecologically sustainable development while enabling justifiable economic and social progress.

In line with Schedules 4 and 5 of the Constitution, LEDET is mandated to oversee and regulate:

- Environment and nature conservation (excluding national parks and botanical gardens)
- Pollution control
- Administration of indigenous forests
- Tourism development and regulation
- Trade and industrial promotion
- Provincial public enterprises
- Consumer protection
- Liquor licensing
- Casinos, gambling, racing and wagering

This broad mandate positions LEDET as both regulator and catalyst for provincial economic transformation.

Core Services

LEDET delivers a suite of regulatory and developmental services, including:

- Liquor licensing and compliance
- Consumer protection services
- Registration and oversight of tourist guides
- Environmental Impact Assessments (EIAs)
- Environmental compliance monitoring and enforcement

These functions ensure that economic activity in the province is well-regulated, environmentally responsible, and aligned with national and provincial development priorities.

2.1 Conservation Mandate

Within its broader mandate to steward Limpopo's natural assets and drive sustainable tourism growth, LEDET's core responsibilities include the management of the province's protected area network.

As custodian of provincial nature conservation, the department oversees a portfolio of strategically significant nature reserves that anchor Limpopo's biodiversity economy and ecotourism offering. These include, among others, Lekgalameetse Nature Reserve, Wolkberg Wilderness Area, Nylsvley Nature Reserve (a Ramsar wetland of international importance), Ben Lavin Nature Reserve, Tzaneen Nature Reserve, Mabusa Nature Reserve, and the Modjadji Cycad Reserve; home to the world-renowned Modjadji cycads.

Together, these parks form the ecological backbone of the province, supporting conservation, research, community livelihoods, and tourism development.

2.2 Tourism Mandate

LEDET's tourism mandate is centred on driving a coherent, competitive and sustainable provincial tourism system that contributes meaningfully to Limpopo's economic transformation, spatial rebalancing and job creation. In line with the Limpopo Tourism Growth Strategy, the directorate's responsibilities encompass the following core elements:

1. Strategy Implementation and Sector Coordination

- Lead and coordinate the implementation of national and provincial tourism strategies to ensure alignment with Limpopo's growth priorities.
- Facilitate integrated planning across tourism and related sectors such as transport, environment, creative industries and events to strengthen destination competitiveness.

2. Destination Development and Planning

- Provide technical support for destination planning initiatives across the province.
- Drive tourism destination development, including product, experience and route enhancement, with a focus on high-impact and priority nodes.
- Monitor tourism infrastructure and support maintenance interventions to safeguard destination quality and visitor experience.

3. Tourism Investment and Enterprise Development

- Facilitate tourism investment opportunities that stimulate inclusive economic growth.
- Mobilise resources for community-based tourism initiatives to broaden participation and support rural development.
- Promote economic empowerment through enterprise development, transformation programmes and targeted capacity-building.

4. Tourism Enablers and Service Excellence

- Strengthen key enablers for tourism growth, including signage, safety, accessibility and service excellence.
- Manage tourism signage applications in collaboration with road authorities such as RAL and SANRAL.
- Promote responsible tourism practices and ensure the implementation of service excellence norms and standards across the sector.



5. Awareness, Safety and Sector Transformation

- Implement tourism awareness programmes to build a culture of hospitality and enhance community participation.
- Promote tourism safety awareness campaigns to improve visitor confidence and destination reputation.
- Support transformation initiatives that advance inclusivity, skills development and equitable sector participation.

6. Project Support and Implementation

- Provide planning and implementation support for prioritised tourism infrastructure, product and route development projects.
- Ensure a conducive environment for tourism growth that contributes to provincial economic development and job creation.

LEDET's combined tourism and conservation roles serve to ensure that protected natural assets continue to drive the province's destination appeal and economic impact. The Department therefore has a responsibility to link *sound environmental management* with *sustainable tourism development* practices to grow tourism and at the same time protect natural resources. This alignment is critical to achieving a sustainable and inclusive tourism economy envisioned in the Growth Strategy.

3. Methodological Approach

The development of the Limpopo Tourism Growth Strategy (LTGS) 2026–2030 followed a rigorous, evidence-based and consultative methodology aligned with the province's commitment to inclusive growth, sustainable development, and responsive planning. The approach ensured that the Strategy is grounded in empirical research, shaped by stakeholder insights, and reflective of the dynamic macro-environment within which the tourism sector operates.

Foundational Research and Policy Alignment

The process commenced with extensive desktop research to establish a comprehensive understanding of global, national, and provincial tourism trends. This included the analysis of demand patterns, supply-side capabilities, investment flows, and competitiveness indicators. A systematic review of pertinent legislative, policy and strategic documents—including national tourism frameworks, provincial development plans, district growth strategies, and sector-specific regulations—ensured that the LTGS is fully aligned with the broader developmental agenda of Limpopo and South Africa.

Stakeholder Consultations

Recognising tourism as a people-centred sector, the Strategy was informed by broad-based stakeholder consultations across all five districts: Capricorn, Mopani, Sekhukhune, Vhembe and Waterberg. Engagements included tourism operators, community representatives, traditional leadership, local government officials, conservation entities, and private-sector partners. These consultations provided critical insights into destination strengths, operational challenges, investment barriers, and opportunities for catalytic growth.

In addition, targeted interviews were conducted with the LEDET senior management team, whose strategic perspectives and institutional knowledge were essential in shaping the policy direction, implementation modalities, and governance mechanisms of the LTGS.

During the development of the Strategy, severe flooding occurred in parts of the province, significantly affecting tourism infrastructure, community livelihoods, and visitor movement. In response, the project team undertook additional consultations in the flood-affected areas to ensure that the lived experiences, recovery needs, and resilience priorities of impacted stakeholders were fully incorporated. This step strengthened the Strategy's focus on climate adaptation, disaster preparedness, and sustainable destination management.

Revisiting the Macro-Environmental Analysis

The methodological approach remained adaptive to global shifts. The outbreak of geopolitical conflict in the Middle East during the drafting period necessitated a reassessment of the macro-environmental analysis, particularly regarding international source markets, aviation patterns, global fuel prices, and investor sentiment. This ensured that the LTGS reflects the most current risk landscape and positions Limpopo to respond proactively to external shocks.

Methodology for Setting Provincial Targets (2026–2030)

The establishment of provincial tourism targets for the LTGS 2026–2030 followed a structured, multi-layered methodology:

Baseline Determination

Historical performance data (pre- and post-COVID-19) were analysed to establish realistic baselines for arrivals, spend, occupancy, product development, and employment.

Trend and Scenario Modelling

Forecasting incorporated global tourism recovery trajectories, domestic travel patterns, and sector-specific growth drivers. Scenario modelling accounted for optimistic, moderate, and conservative pathways.

District-Level Disaggregation

Targets were calibrated to reflect the unique economic profiles, resource endowments, and tourism potential of each district, ensuring equitable and spatially balanced growth.

Stakeholder Validation

Draft targets were tested with industry stakeholders and LEDET leadership to confirm feasibility, ambition, and alignment with investment and infrastructure plans.

Integration of Risk and Resilience Factors

Climate-related disruptions, geopolitical volatility, and economic uncertainties were factored into the modelling to ensure that targets remain robust under varying conditions.

Stakeholder Analysis and Mapping

Understanding the stakeholder landscape is a critical component of the situational analysis, as the successful implementation of the Limpopo Tourism Growth Strategy depends on the coordinated efforts of a wide range of actors across government, industry, communities and the conservation sector.

Consultations revealed that Limpopo's stakeholder ecosystem is fragmented, with weak communication flows that often leave stakeholders disengaged. Levels of integration also vary across districts, with some showing stronger collaboration while others experience divisions along business size, geography and other socio-economic lines, creating a challenging environment for driving sustainable and inclusive tourism growth.

The stakeholder analysis and mapping provide a consolidated view of all institutions, partners and role-players that influence or are influenced by tourism, conservation, economic development, spatial planning and the creative economy, forming the basis for targeted engagement and alignment throughout the strategy cycle.

A. Government Stakeholders

Table 1: Provincial Government (Core Mandate Holders)

Stakeholder	Role in LTGS	Strategic Interest
LEDET (Tourism, Conservation, Economic Development)	Lead implementation of the LTGS; integrate tourism, conservation and economic development; drive investment and transformation	Sustainable tourism growth, biodiversity protection, job creation and sustainable livelihoods
Limpopo Provincial Treasury	Budget allocation, oversight of provincial investment priorities	Efficient resource allocation and economic returns
Office of the Premier	Oversight of LDP, DDM alignment, intergovernmental coordination	Provincial development coherence

District & Local Municipalities (DDM Sphere)

- Capricorn, Mopani, Sekhukhune, Vhembe, Waterberg Districts
- Local municipalities responsible for:
 - Spatial planning and land use
 - Local infrastructure
 - Community tourism initiatives
 - LED strategies aligned to LTGS
- Strategic Interest: Local economic development, job creation, community beneficiation.

National Government

Table 2: National Stakeholders

Department	Relevance
Department of Tourism	National policy alignment, funding, infrastructure support
Department of Forestry, Fisheries Environment (DFFE)	Biodiversity management, protected areas, climate resilience
Department of Arts & Culture	Creative economy integration
Department of Transport	Access, mobility, road infrastructure
SANRAL & RAL	Tourism signage, road access, safety
SA Tourism	Marketing alignment, research, brand positioning

B. Conservation & Environmental Stakeholders

- LEDET Conservation Division
- Protected Area Management Authorities (Lekgalameetse, Wolkberg, Nylsvley, Modjadji Cycad Reserve, etc.)
- SANParks (Kruger National Park interface)
- Biodiversity NGOs (WWF-SA, Endangered Wildlife Trust, BirdLife SA)
- Research institutions (Universities, CSIR, NRF)

Strategic Interest - Biodiversity protection, ecological integrity, sustainable use, ecotourism development.

C. Tourism Industry Stakeholders

- Limpopo Tourism Agency (LTA)
- Tourism Business Council of South Africa (TBCSA)
- Hospitality associations (FEDHASA, SATSA, SAACI)
- Tour operators, guides, accommodation providers
- The Limpopo hunting community
- Route and cluster organisations (e.g., Waterberg Biosphere, Magoebaskloof Tourism)

Strategic Interest: Market growth, improved infrastructure, safety, investment, skills.

D. Creative Economy Stakeholders

- Creative practitioners (craft, design, music, film, festivals)
- Cultural institutions (museums, heritage sites, cultural villages)
- Creative hubs and incubators
- Event organisers and promoters
- Strategic Interest: Market access, cultural tourism integration, enterprise development.

E. Communities & Traditional Leadership

- Traditional councils
- Community Property Associations (CPAs)
- Community-based tourism enterprises
- Land claim beneficiaries

Strategic Interest: Jobs, beneficiation, cultural preservation, local ownership.

F. Private Sector & Investors

- Tourism investors (lodges, resorts, attractions)
- Property developers
- Financial institutions (IDC, DBSA, SEFA, commercial banks)

Strategic Interest: Investment security, returns, enabling environment.

G. Knowledge & Research Partners

- Universities (UL, UNIVEN, TUT Polokwane)
- TVET colleges
- Research councils

Strategic Interest: Skills development, innovation, data, monitoring.

H. Enabling Stakeholders

- ESKOM (energy reliability)
- Water utilities
- Telecoms providers (connectivity for tourism and creative industries)

Strategic Interest: Infrastructure stability, service delivery

Together, this stakeholder mapping provides a clear picture of the diverse interests, mandates and capabilities that shape Limpopo's tourism and conservation landscape. It highlights the interdependencies across sectors and spheres of government, underscoring the need for coordinated action and shared accountability in delivering the Growth Strategy. This understanding forms the basis for a targeted and coherent stakeholder engagement approach that will guide implementation and strengthen the overall effectiveness of the LTGS.



4. Limpopo - Provincial Overview

Limpopo is South Africa's northernmost province and a strategic gateway to the SADC region, sharing borders with Botswana, Zimbabwe, and Mozambique. Its geographic position, rich natural resource base, and cultural diversity position it as a high-potential growth node within the national economy. The province continues to demonstrate resilience, recording 0.9% economic expansion in 2024, driven primarily by finance, personal services, utilities, transport, manufacturing, and trade.

Limpopo contributes 7.4% to South Africa's GDP and remains a critical player in mining, agriculture, tourism, and logistics (South Africa Regional eXplorer, V2646).

Economic Structure and Sectoral Composition

Limpopo's economy is anchored by a mix of real and service sectors, with the real economy accounting for 33% of provincial output. Mining remains the dominant real sector, contributing 23% of provincial GVA, followed by manufacturing (4%), agriculture (3%), and construction (2%).

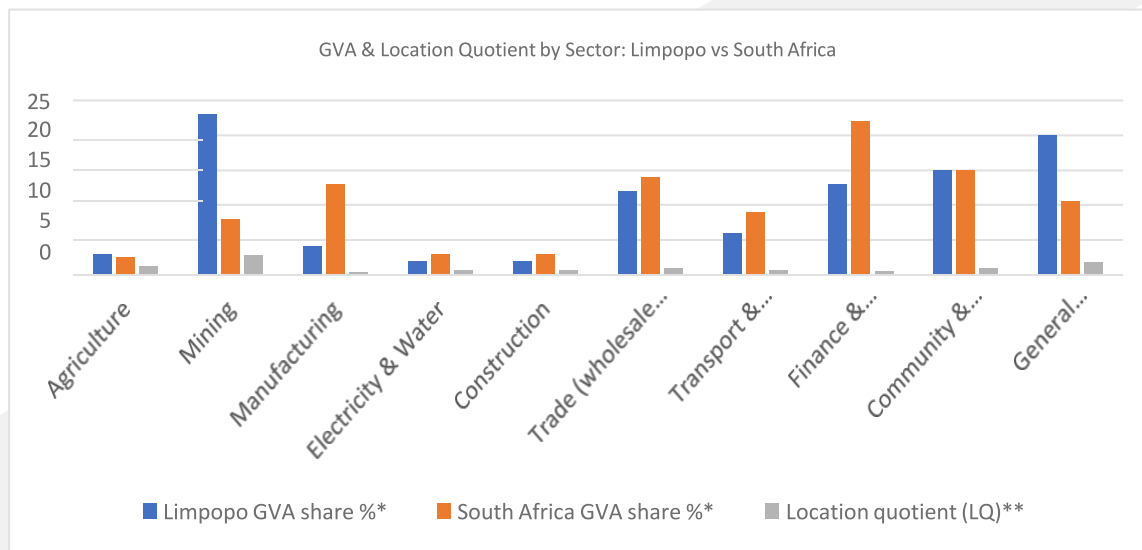
The province's 2021 rebound, driven by a 10% surge in GDP contribution, was largely attributed to strong commodity prices and the resilience of its mining sector (South Africa Regional eXplorer, V2646).

Key Economic Drivers

The core economic drivers for the Limpopo Province are the following sectors:

- **Mining and Mineral Beneficiation** Limpopo is South Africa's "natural resource treasure chest," endowed with platinum group metals, chromium, nickel, vanadium, tin, phosphates, fluorspar, diamonds, copper, emeralds, and more. As can be seen from the Location Quotient chart below, the province has a higher concentration of mining than any other sector. Hence mining contributes 22% of the provincial GGP and remains the backbone of the economy.

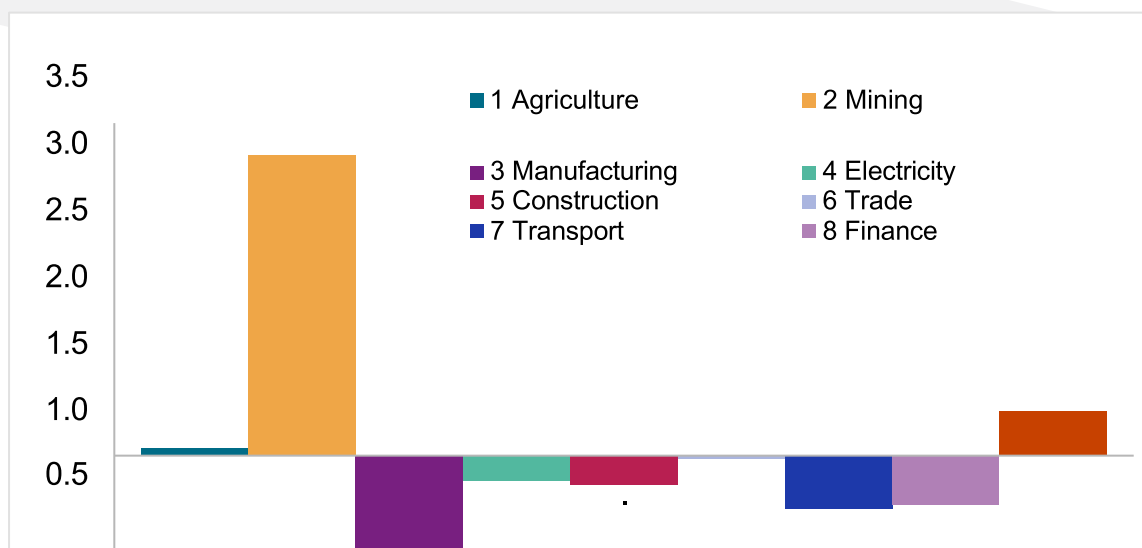
Figure 1: Chart: GVA & Location Quotient by Sector: Limpopo vs South Africa



(Source: TIPS 2023/Quantec 2023)

Tourism, as a key component of trade in services, represents an important pillar of Limpopo's economy and is consistently prioritised by provincial and local government as a catalyst for inclusive growth and employment creation. However, as the chart below indicates, the province's economy is heavily concentrated in the mining sector.

Figure 2: Chart: Location Quotient for Limpopo Province



Location quotient

Limpopo, 2024

Source: South Africa Regional eXplorer v2646.

Data compiled 7 July 2025.

© 2025 S&P Global.

- Agriculture and Agro-processing are two of the key sectors in the Limpopo with the province producing: 75% of national mangoes, 65% of papaya, 60% of avocados, 25% of citrus, two-thirds of tomatoes and 285,000 tons of potatoes, alongside bananas, litchis, nuts, tea, cotton, tobacco, timber, and extensive cattle/game ranching.
- Tourism and Conservation Economy Limpopo's tourism assets - Big Five reserves, cultural landscapes, UNESCO-linked heritage, and transfrontier conservation areas - position it as a premier eco-tourism destination. The sector is supported by strong logistics corridors, airports, and cross-border linkages.
- The Finance, Personal Services, and Public sectors were the largest contributors to Limpopo's 2024 economic growth, reflecting the province's expanding service economy.
- Transport, Logistics, and Trade Corridors The Maputo Development Corridor and Phalaborwa SDI strengthen Limpopo's role as a regional trade gateway, enhancing investment attractiveness.

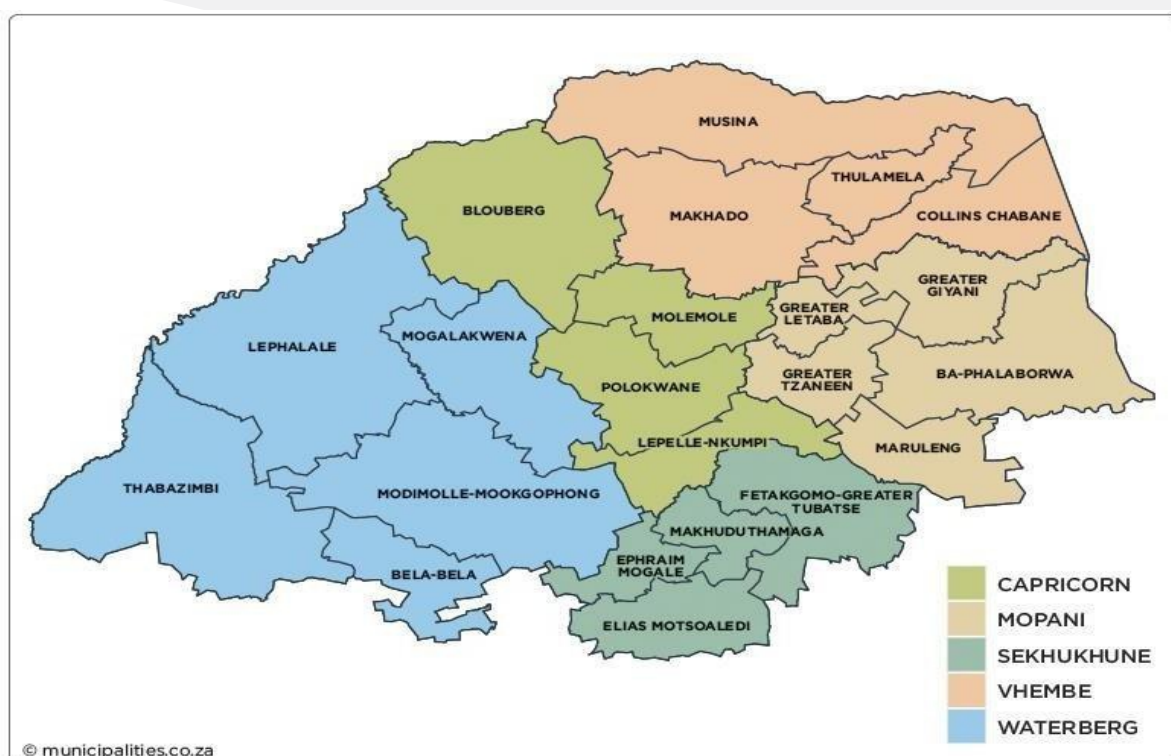
Demographic Profile

Limpopo is home to one of the youngest and fastest-growing populations in the country, with a high proportion of residents living in former homeland areas. This demographic structure presents both developmental challenges and opportunities; particularly for skills development, youth employment, and inclusive growth. The province's cultural richness, anchored in BaPedi, VhaVenda, and VhaTsonga communities, strengthens its tourism value proposition and supports the expansion of heritage, cultural, and rural tourism offerings. Limpopo is widely regarded as South Africa's most predominantly rural province, with estimates suggesting that around 80% of its population resides in rural settlements or village-based communities.

District and Local Municipalities

Limpopo comprises five district municipalities, each with distinct economic and tourism profiles:

Figure 3: Limpopo Districts & Local Municipalities



Capricorn District Municipality (CDM)

The Capricorn District is the provincial administrative hub centred around Polokwane. It serves as centre of governance and economic coordination; with the following key sectors: finance, government services, logistics, and retail. The Capricorn District also functions as a strategic gateway to major *tourism* routes across Limpopo.

Mopani District Municipality (MDM)

Mopani District is a leading agricultural region, distinguished by its citrus, subtropical fruit, and vegetable production. It hosts some of Limpopo's most significant tourism assets, including key sections of the Kruger National Park. This combination positions Mopani as a vital contributor to both *food security* and *tourism* growth.

Vhembe District Municipality (VDM)

Bordering Zimbabwe and Mozambique, Vhembe District plays a pivotal role in cross-border trade and regional integration. Its economy is anchored in high-value agriculture such as bananas, macadamia, and tea. The district's rich cultural heritage further strengthens its appeal as a *cultural tourism* destination.

Sekhukhune District Municipality (SDM)

Sekhukhune District is a mining-intensive region, driven by platinum group metals, chrome, and vanadium extraction. Alongside its mineral base, the district is cultivating emerging opportunities in agro-processing and tourism. These sectors offer pathways for diversification and inclusive local development.

Waterberg District Municipality (WDM)

Waterberg District stands out as a premier conservation and eco-tourism landscape, anchored by the Waterberg Biosphere. Its economy is further supported by strong mining activities and an extensive game-ranching sector. This blend of natural assets and economic activity positions Waterberg as a flagship eco-tourism region.

Each district comprises multiple local municipalities, forming a diverse economic landscape that supports tourism, agriculture, mining, and services.

Employment and Labour Market Dynamics

Construction overtook agriculture as the largest employer among real economic sectors in 2023, reflecting infrastructure expansion and public investment. Mining, while capital-intensive, remains a significant employer in specific districts, particularly Sekhukhune and Waterberg.

The province's youthful population underscores the need for targeted skills development, TVET strengthening, and entrepreneurship support—priorities already embedded in provincial strategies.

Comparative Advantages Relative to Other Provinces

Limpopo holds several strategic advantages that differentiate it within South Africa's provincial economy:

Natural Resource Endowment

- One of the richest mineral reserves in the country, second only to North West and Mpumalanga in mining intensity.
- Dominant producer of key agricultural commodities, outperforming Western Cape and KwaZulu-Natal in several subtropical categories.

Strategic Geographic Position

- Only province bordering three SADC countries.
- Critical to regional logistics, trade, and tourism flows.

Tourism and Conservation Assets

- Home to major game reserves, cross-border parks, and cultural heritage sites.
- Strong eco-tourism and adventure tourism positioning.
-

Resilient Economic Performance

- One of only three provinces with strong positive growth in 2024.
- Finance and personal services sectors expanding steadily.

Agricultural Diversity and Climate Advantage

- Year-round production capacity.
- Unique subtropical climate enabling high-value crops not widely grown elsewhere.

Strategic Implications for Tourism Growth

LEDET's mandate, combined with Limpopo's economic and demographic profile, establishes clear strategic imperatives for tourism growth.

- Limpopo's natural assets are its strongest competitive advantage, requiring tourism development to be grounded in ecological sustainability, sound conservation management, and sustainable resource use.
- Parks, wetlands, forests, and wilderness areas are core economic assets that shape destination appeal, market confidence, and diversification into higher-value nature-based tourism.
- Strong conservation performance directly supports stronger economic outcomes.
- Tourism and environmental management must jointly advance provincial priorities of job creation, enterprise development, and spatially inclusive growth.
- Sustainable resource use and long-term ecological resilience are essential for maintaining the province's economic base.
- Industrial promotion, trade, and public enterprise oversight must integrate environmental safeguards with tourism opportunities.



- Coordinated planning, where environmental sustainability, tourism development, and economic growth reinforce one another, is critical for unlocking Limpopo's full tourism potential.

Within this integrated framework, Limpopo must:

- Leverage natural and cultural assets to expand eco-tourism, heritage tourism, and rural tourism.
- Strengthen tourism-linked value chains in agriculture, crafts, hospitality, and logistics.
- Promote cross-border tourism packages through its proximity to SADC markets.
- Invest in infrastructure and skills development to support inclusive, sustainable tourism growth.
- Position the province as a leading green-economy destination grounded in conservation, community development, and responsible tourism.

5. Situational Analysis

5.1 Introduction

The Situational Analysis provides the analytical foundation for the Limpopo Tourism Growth Strategy (LTGS) by presenting a comprehensive diagnostic of the province's operating environment, competitive position, and long-term growth potential. It establishes the evidence base for the Tourism Growth Strategy through an integrated assessment of the global tourism context, the prevailing macro-economic and sectoral conditions, and the legislative and policy frameworks that shape tourism development in South Africa and Limpopo. This includes an examination of global recovery trajectories, domestic travel patterns, investment trends, and the regulatory instruments that guide destination management and sector transformation.

The analysis further interrogates the current tourism clusters that underpin Limpopo's growth trajectory, assessing their performance, spatial distribution, and alignment with provincial development priorities. Route development opportunities are evaluated to determine connectivity gaps, catalytic corridors, and areas where enhanced access can unlock new tourism value. A detailed market analysis and opportunity scan identifies emerging niches, high-potential segments, and new areas for product diversification and investment attraction.

This technical assessment was strengthened by extensive stakeholder consultations across all five districts, ensuring that local insights, operational realities, and community-level priorities directly informed the findings. Engagements with tourism operators, traditional leadership, conservation entities, municipalities, and private-sector partners provided a grounded understanding of both the opportunities and constraints shaping the sector. Together, these elements form a holistic situational picture that guides the strategic direction, interventions, and targets of the LTGS 2026 - 2030.

5.2 Legislative and Policy Context

Tourism development in Limpopo Province is governed by a multi-layered system of international, national, provincial, and local legislation and policy frameworks that collectively shape the province's strategic direction, priorities, and institutional arrangements. The *Limpopo Tourism Growth Strategy Review (2026–2030)* situates itself within this framework to ensure complete alignment with South Africa's constitutional mandates, national development priorities, and global sustainability commitments. The overarching objective is to harmonise tourism growth with environmental stewardship, community empowerment, and inclusive economic transformation.

At the **international level**, the United Nations' *Sustainable Development Goals (SDGs)* and the African Union's *Agenda 2063 – The Africa We Want* provide the global policy anchor. The SDGs promote poverty reduction, gender equality, and sustainable economic growth, while Agenda 2063 positions Africa as a unified, prosperous, and peaceful continent. Together they emphasise green growth, regional cooperation, and social inclusion, principles echoed in Limpopo's approach to ecotourism, community tourism, and cross-border partnerships. The Southern African Development Community Vision 2050 and Regional Indicative Strategic Development Plan 2020-2030: Focuses on long-term regional development, driven by industrialisation, infrastructure development, and human capital growth. Tourism is a priority sector for regional integration, economic diversification, and creating employment opportunities across Southern Africa.

5.2.1 National Legislative and Policy Framework

At the **national level**, several key frameworks define tourism's developmental role:

1. **The Constitution of the Republic of South Africa (1996)** establishes tourism as a *concurrent national and provincial competence*, mandating cooperative governance and local participation through Local Economic Development (LED) structures.
2. The **National Development Plan (NDP 2030)** recognises tourism as a primary driver of employment and rural development, calling for enhanced infrastructure, safety, and skills development.
3. The **Government of National Unity (GNU 2024–2029)** outlines the following foundational principles and guiding priorities: rapid and inclusive economic growth, social justice, investment in people, local government stabilisation, strengthening state capacity, enhancing law enforcement and national security, enhancing social cohesion, and advancing a foreign policy rooted in human rights, international cooperation and advancing South Africa's interests.
4. Informed by the Indlulamithi Scenarios 2035 processes and the evaluative reviews conducted on the NDP, 30 Years of Democracy, and 2019-2024 period, the **Medium-Term Development Plan (MTDP) 2024-2029** aligns with the GNU priorities and integrates these into the government planning system, in pursuit of the NDP's 2030 goals. The MTDP 2024-2029 serves as the bridge between the long-term aspirations of the NDP and the actionable, immediate interventions required to address the country's socio-economic challenges. It positions tourism as an essential component of inclusive growth, poverty reduction, and state development, ensuring that efforts align with South Africa's broader development agenda.
5. The **Growth, Acceleration and Inclusion (GAIN) Framework**, jointly developed by the government and the Harvard Growth Lab, promotes inclusive economic transformation through infrastructure investment, sectoral diversification, human capital development, and institutional strengthening. Tourism is identified as a high-potential sector for inclusive expansion.
6. South Africa's **Rural Tourism Strategy** is a national framework designed to unlock the economic potential of rural areas by developing, enhancing, and marketing rural tourism products in a coordinated and sustainable manner. The strategy recognises that many of the country's most valuable natural, cultural, and agricultural assets are located in rural spaces that have historically been excluded from mainstream tourism value chains. It therefore prioritises *product development, route creation, capacity building, infrastructure improvement, and market access interventions* that enable rural communities to participate meaningfully in the tourism economy. Central to the strategy is the belief that rural tourism can stimulate inclusive growth, diversify rural livelihoods, preserve cultural heritage, and strengthen local economies through *community-based and agritourism initiatives*.
7. For Limpopo, the implications of this national strategy are both significant and catalytic. Limpopo is one of South Africa's most rural provinces, with abundant cultural heritage, agricultural landscapes, wildlife assets, and community-based tourism offerings that align directly with the national strategy's priorities. The Rural Tourism Strategy reinforces the need for Limpopo to intensify its focus on route development, cluster formation, and the upgrading of rural tourism products to ensure they are market-ready and competitive. It also underscores the importance of integrating smallholder farmers, traditional communities, and rural SMMEs into the tourism value chain; an approach that can

substantially enhance the province's Tourism Growth Strategy. By aligning with the national framework, Limpopo can strengthen its positioning as a leading rural and agritourism destination, attract greater investment, and ensure that tourism growth translates into tangible socio-economic benefits for rural communities across the province.

8. The **Tourism White Paper (2024)** envisions a tourism sector that consistently leverages innovation and digital technology as the basis of creative and compelling tourism experiences, builds partnerships to strengthen tourism's impact, addresses barriers to tourism growth, and responds to the country's social cohesion imperatives. For clarification of priority markets, the map has been replaced with a table listing these priority markets.
9. The **South African Airline Route Strategy (2024–2029)** further supports tourism competitiveness by expanding domestic and international connectivity—an essential condition for Limpopo's growth, given its distance from primary gateways.
10. The **2026 State of the Nation Address** signalled a strong, supportive policy environment for tourism growth, driven by improved economic stability, major infrastructure investment, and rising investor confidence. Commitments to expand transport, water, and digital systems, alongside strengthened public–private partnerships, create a more competitive and investment-ready tourism landscape. Immigration reforms, particularly the nationwide rollout of the Electronic Travel Authorisation, enhance accessibility and are expected to generate significant tourism-linked employment. Government action on crime and border security improves safety perceptions, a critical factor for visitor confidence and destination appeal. While persistent municipal service delivery challenges pose risks, national infrastructure programmes offer long-term solutions. Expanded youth employment initiatives strengthen the tourism skills pipeline, especially for hospitality, guiding, events, and digital services. With tourism reaffirmed as a national priority under the GAINS strategy, the sector gains *increased policy support, funding opportunities, and alignment with inclusive growth objectives*, positioning South Africa to expand *cultural, heritage, and nature-based* tourism while driving job creation and social development.
11. The **National Biodiversity Economy Strategy (NBES)** positions South Africa's biodiversity—across wildlife, bioprospecting, and ecotourism—as a high-potential economic sector capable of driving inclusive growth, rural development, and conservation, but currently underperforming relative to its potential due to weak coordination, regulatory complexity, limited transformation, and underdeveloped value chains. The strategy highlights strong latent demand (domestic and international), significant job creation potential (from +/- 418,000 to potentially 1 million jobs by 2030), and untapped market value (e.g. bioprospecting operating at +/-20% of potential), while also identifying major risks including climate change, disease outbreaks, infrastructure constraints, and market/regulatory barriers. It proposes a coordinated, node-based (Biodiversity Economy Nodes) and partnership-driven approach, underpinned by sustainable use, equitable benefit sharing, community inclusion, and improved market access, with a targeted growth ambition of 10% per annum through structured interventions across all three sectors.

The NBES strongly reinforces the strategic direction already emerging in the LTGS, particularly the positioning of Limpopo as a biodiversity-led destination economy anchored in the Nature, Safari & Adventure and Wildlife Economy & Conservation clusters. It implies that Limpopo should:

- explicitly align its cluster model with the biodiversity economy value chains (*wildlife, ecotourism, and bioprospecting*), strengthening integration between conservation, tourism, and rural economies;
- adopt a *nodal and corridor-based* development approach, similar to Biodiversity Economy Nodes, to structure investment, infrastructure, and SMME participation around key protected areas and community landscapes;

- prioritise community inclusion, beneficiation, and local supply chains as core economic drivers rather than secondary outcomes;
- strengthen regulatory alignment, institutional coordination, and implementation capacity, which NBES identifies as systemic constraints;
- expand product diversification and value addition, especially linking tourism with biodiversity products (e.g. indigenous foods, wellness, traditional knowledge experiences); and
- embed climate resilience and ecological infrastructure protection into tourism planning.

Overall, the NBES provides a national policy mandate that supports, and arguably requires, the LTGS to move beyond traditional tourism development toward a fully integrated biodiversity economy model, with measurable outcomes in conservation, livelihoods, and inclusive growth.

5.2.2 Provincial and Local Frameworks

In addition to the international and national legislative and policy frameworks that the province has to give due regard and alignment with developing tourism in the region, there are various provincial frameworks which are key to the discharge of the tourism development mandate within the province.

The Limpopo Development Plan 2025–2030 articulates the province's roadmap to eliminate poverty, reduce inequality and improve citizens' quality of life by translating the National Development Plan's long term vision into provincially tailored priorities and interventions; it focuses on driving inclusive economic growth and job creation, strengthening infrastructure and basic service delivery, promoting rural and spatial development, investing in human capital and social services, and improving governance and institutional capacity to ensure coordinated, measurable progress across sectors and localities.

Local government legislation, including the **Municipal Systems Act (2000)**, **Municipal Finance Management Act (2003)**, and **Spatial Planning and Land Use Management Act (2013)**, ensures that tourism development is embedded within *Integrated Development Plans (IDPs)* and municipal budgets. District-level IDPs identify catalytic tourism projects, such as route development, heritage site restoration, and community tourism hubs, that directly align with provincial implementation priorities. The detailed legislative review provides a synopsis of the key tourism priorities and projects of Limpopo's district and local municipalities.

The District Development Model (DDM) frames districts and metros as primary planning and implementation units for tourism by aligning national, provincial and local plans, budgets and capacities into a single coordinated district tourism plan that leverages integrated governance, spatial targeting and data-driven decision-making to unlock local economic development, enhance service delivery and create jobs; applied to a tourism strategy, the DDM prioritises strengthening municipal and destination management capacity, aligning infrastructure and safety investments, coordinating destination marketing and community-based tourism initiatives, promoting inclusive participation of local businesses and historically disadvantaged groups, and establishing clear monitoring and accountability mechanisms to ensure that tourism interventions yield visible, sustainable socio-economic benefits at the local level.

5.2.3 Sectoral Legislative and Policy Frameworks

The **Tourism Act (2014)** provides the legal foundation for coordinated management and marketing, establishing the South African Tourism Board and the Tourism Grading Council, and requiring intergovernmental alignment across spheres.

The **National Tourism Sector Strategy (NTSS 2016–2026)** articulates tourism's vision as a *significant and sustainable contributor to GDP and inclusive growth*, structured around five pillars—effective marketing, visitor experience, destination management, sustainability, and transformation.

The **Tourism Sector Growth Strategy (TSMP 2023)** modernises the NTSS by grouping interventions under three interlinked pillars:

1. *Protect and Rejuvenate Supply* – conserving natural and cultural assets, improving infrastructure, and maintaining quality standards.
2. *Re-ignite Demand* – restoring traveller confidence and stimulating domestic, regional, and international markets.
3. *Strengthen Enabling Capability* – enhancing governance, data systems, and partnerships. These are operationalised through seven strategic interventions and three cross-cutting enablers that inform Limpopo's 2026–2030 framework.

The TGCSA, under the Tourism Act, establishes and maintains South Africa's official grading system for tourism establishments. The criteria set clear quality and service standards to assess accommodation and tourism services. Standardised ratings enhance visitor experience by informing tourists of expected service levels, amenities, and facilities. The system uplifts sector competitiveness by promoting global standards and safeguarding South Africa's reputation as a premier tourism destination.

The White Paper on the Development and Promotion of Tourism in South Africa (1996) provides a framework and guidelines for tourism development and promotion in South Africa. The White Paper 2024 was gazetted on 4th October 2024.

The **Green Paper (2023)** sets out a strategy to drive inclusive, sustainable tourism growth, job creation, and increased economic contribution in South Africa. Its priorities are strengthening governance, safety and sector transformation; embracing technology, crisis management, improved visitor services and easier access (including immigration and transport); and promoting rural, peri-urban and domestic tourism alongside effective destination marketing and branding. It also advances responsible tourism, research and knowledge management, tourism diplomacy and investment. Key measures include a regulatory environment for technology, a tourism safety response programme, Tourism B-BBEE codes to improve access to finance, and regulation of short-term rentals for policy certainty.

Drawing on the Green Paper on Tourism, the Tourism BBBEE Charter provides for the transformation of the tourism industry by promoting equitable economic opportunities for historically disadvantaged individuals and communities through a B-BBEE framework that drives enterprise and supplier development, increases Black-owned business participation across the value chain, prioritises skills development to improve employment and entrepreneurship, and supports socio-economic development via community-based tourism, aligning with broader B-BBEE policy to ensure inclusive growth, ownership, and employment for marginalised groups.

At the **provincial level** the **Limpopo Tourism Act (2009)** the Limpopo Tourism Act 2009 establishes the Limpopo Tourism Agency and a provincial legal framework to promote, coordinate and regulate tourism; it prioritises destination marketing and promotion, governance and institutional strengthening, enterprise and community-based tourism support, skills development and investment, and aligns provincial tourism planning with municipal and national initiatives through defined Agency functions and powers.

The **Limpopo Tourism Growth Strategy (2018–2024)** introduced a cluster-based approach - Family & Recreation, Safari & Hunting, Sport & Wildlife, Culture & Heritage, Business Events, and Special Interest - which remains the organising framework for the revised Growth Strategy.

5.2.4 Implications for a Limpopo Tourism Growth Strategy

Alignment and Policy Coherence

The revised Tourism Growth Strategy must function as a policy-integrating instrument that aligns global commitments, national mandates, and provincial implementation realities. This ensures that Limpopo's tourism initiatives qualify for national funding streams, comply with legislative obligations, and contribute meaningfully to broader socio-economic goals such as the NDP 2030 and the SDGs. The Rural Tourism Strategy further reinforces the need for coherence by prioritising rural product development, route creation, and community participation—areas that are central to Limpopo's tourism landscape.

Institutional Coordination and Governance

Clear role definition among LEDET, the Limpopo Tourism Agency, municipalities, traditional authorities, and private-sector partners is essential. Strengthening provincial coordination through a Tourism Governance Forum chaired by the MEC for Tourism will reduce duplication, enhance accountability, and improve decision-making efficiency. The Rural Tourism Strategy underscores the importance of multi-stakeholder governance in rural spaces, where land tenure, community structures, and traditional leadership require coordinated planning and implementation.

Transformation and Inclusivity

National frameworks such as the GAIN Framework, the TSMP 2023, and the Rural Tourism Strategy embed transformation and inclusive growth as non-negotiable priorities. The Growth Strategy must translate these into measurable provincial actions—supporting black-owned enterprises, women and youth-led ventures, community-based tourism enterprises, and agritourism initiatives. The Rural Tourism Strategy specifically calls for integrating smallholder farmers, rural SMMEs, and traditional communities into tourism value chains, which aligns directly with Limpopo's socio-economic profile.

Sustainability and Environmental Stewardship

In line with the SDGs, Agenda 2063, and national environmental legislation, Limpopo must balance tourism expansion with ecological integrity. The legislative framework mandates integrating biodiversity conservation, land-use planning, and responsible tourism certification across all clusters. Rural tourism development, often located in ecologically sensitive landscapes, requires even stronger environmental safeguards, community stewardship models, and sustainable resource-use practices.

Infrastructure and Connectivity

Alignment with the national Airline Route Strategy and Limpopo's infrastructure initiatives highlights the need to improve air, road, and ICT connectivity. Strategic investments in gateway airports (Polokwane and Hoedspruit), access roads to flagship attractions, and digital

connectivity in rural nodes are critical enablers of growth. The Rural Tourism Strategy amplifies this imperative by emphasising infrastructure upgrades in rural areas to ensure product readiness, safety, and market access.

Evidence-Based Planning and Accountability

The PFMA and MFMA require transparent budgeting, performance monitoring, and data-driven decision-making. The Master Plan incorporates a monitoring and evaluation framework aligned with these legislative imperatives, ensuring that project outcomes are measurable and fiscally sound. The Rural Tourism Strategy adds a further requirement for community-level data, rural enterprise mapping, and route-level performance indicators to track inclusive growth.

Regional Integration and Cross-Border Cooperation

Reflecting Agenda 2063 and the AfCFTA, the plan promotes Limpopo's participation in Transfrontier Conservation Areas (the Greater Limpopo TFCA and the Mapungubwe TFCA) as platforms for joint marketing, investment, and cross-border tourism flows. Rural tourism nodes located near borders stand to benefit significantly from harmonised standards, shared routes, and integrated conservation-tourism models.

Innovation and Technology

The Tourism White Paper (2024) emphasises the need for tourism hotspots such as Limpopo to diversify investment into innovation and technology, improve accessibility, and integrate 5IR solutions. These actions are essential for enhancing competitiveness, improving visitor experiences, and unlocking new investment potential. For rural tourism, digital platforms, e-commerce for agritourism products, and virtual storytelling tools can dramatically expand market reach and visibility.

Rural tourism

The Rural Tourism Strategy (2012) emphasises the need to upgrade rural tourism products, strengthen market readiness, and integrate smallholder farmers, rural SMMEs, and traditional communities into tourism value chains. As one of South Africa's most rural provinces, Limpopo is uniquely positioned to leverage national priorities around *rural product development*, *route formation*, and *community-based tourism*. By aligning with this national framework, Limpopo can position itself as a leading *rural and agritourism destination*, attract greater investment, and ensure that tourism growth translates into tangible socio-economic benefits for rural communities across the province.

The implications on strategy formulation and implementation of the various policy frameworks are summarised in the chart below:

Table 3: Policy/ Legislative implications for strategy

Policy / Legislative Framework	Common Themes and Implications
- Sustainable Development Goals (SDGs) - National Biodiversity Economy Strategy 2023 - Agenda 2063 - Constitution of the Republic of South Africa - National Development Plan (NDP) - Government of National Unity Priorities - Growth Acceleration & Industrialisation Framework (GAIN) - Public Finance Management Act (PFMA) - Municipal Finance Management Act (MFMA) - Municipal Systems Act (MSA) - Spatial Planning & Land Use Management Act (SPLUMA) - Tourism Act 2014 - National Tourism Sector Strategy (NTSS) 2016–2026 - Tourism Sector Master Plan 2023 - Rural Tourism Strategy 2012 - White Paper on Tourism Development 2024 - South African Route Development Strategy - SONA 2026 - SOPA 2026 - Limpopo Creative Economy Strategy - Limpopo Development Strategy - Limpopo Tourism Act 2009 - Limpopo Tourism Growth Strategy 2018 - District Development Model (DDM) - Limpopo Tourism Act 2009 - Limpopo Tourism Growth Strategy 2018 - District Development Model (DDM)	- Evidence-based planning - Inclusive and sustainable economic growth - Environmental stewardship/sustainability - Regional integration - Industrialisation - Good governance and accountability - Social and community development - Economic and Spatial transformation - Institutional coordination - Economic diversification - Financial management and resource efficiency - Spatial planning and transformation - Stakeholder collaboration - Integrated development planning - Tourism development and competitiveness - Market growth - Route development - Policy coherence - Connectivity - Infrastructure - Investment mobilisation - Tourism as catalyst for inclusive provincial tourism growth - Policy alignment - Tourism development - Institutional coordination - Tourism competitiveness - SMME development - Stakeholder collaboration - Governance and coordination - Tourism development - Institutional coordination - Tourism competitiveness - SMME development - Stakeholder collaboration - Governance and coordination

5.3 Organisational Review - Tourism Branch

5.3.1 Introduction

Tourism has been identified by the Limpopo Provincial Government as a lead economic sector with the potential to contribute meaningfully to inclusive growth, employment creation and spatial transformation. The effective delivery of this ambition depends on the institutional capacity and configuration of the Tourism Branch within the Limpopo Department of Economic Development, Environment and Tourism (LEDET).

This chapter provides a structured assessment of the Tourism Branch, focusing on its institutional positioning, mandate, capacity, organisational structure, budget allocation and comparative performance relative to other provinces. The analysis draws on official planning and budget documents, agency reports, internal departmental material, and findings emerging from the Tourism Growth Strategy (TGS) process.

5.3.2 Institutional Positioning and Mandate

Position within LEDET

The Tourism Branch is located within LEDET, a combined department responsible for economic development, environmental management and tourism. As such, tourism is not constituted as a stand-alone departmental function, but rather as one programme within a broader governance framework.

The approved departmental structure confirms that tourism is located within the Branch: Environmental Affairs and Tourism, headed by a Deputy Director-General. This branch is made up of three Chief Directorates namely:

- Chief Directorate: Integrated Environmental Management
- Chief Directorate: Biodiversity And Conservation
- Chief Directorate: Tourism

And a Directorate that reports into the Deputy Director General referred to as Directorate: Environmental Research, Planning and Co-Ordination

The LEDET Annual Performance Plan further confirms that tourism is delivered through Programme 4: Tourism, whose mandate is to support the development, promotion and regulation of tourism in the province.

Functional Mandate and Internal Structure

Within the Environmental Affairs and Tourism Branch, tourism is implemented through the **Chief Directorate: Tourism**, which is formally structured into two directorates:

Directorate: Tourism Planning and Regulations

- Tourism policy and strategy development
- Tourism knowledge management
- Quality assurance and compliance

- Registration of tourism businesses and tourist guides

Directorate: Tourism Destination Development and Transformation

- Implementation of tourism strategies
- Destination development and product facilitation
- Responsible tourism practices
- Capacity building and transformation programmes

The approved organisational structure, however, also indicates that key tourism delivery functions are located outside the Chief Directorate: Tourism but within the same branch.

The broader Environmental Affairs and Tourism Branch include additional directorates that perform certain core tourism functions the most notable being:

Directorate: Commercial Development

- Tourism product development
- Sales and marketing of tourism offerings
- Bookings and reservations
- Management of tourism infrastructure within reserves
- Hospitality services
- Tourism operations within provincial parks

Structural Implication

The organogram therefore reflects a **fragmented internal tourism system**, in which:

- Strategic tourism functions are located in the Chief Directorate: Tourism
- Operational and commercial tourism functions are located in **the Chief Directorate for Biodiversity and Conservation**

This results in a situation where:

Tourism is not organised as a single, integrated value chain within the department, but rather as a set of distributed functions across multiple chief directorates.

Integrated Tourism System

The Tourism Branch should therefore be understood as a **four-part functional system**:

- Tourism Planning and Regulations
- Tourism Destination Development and Transformation
- Commercial Development
- Provincial Protected Areas Management

This reflects a structurally dispersed tourism delivery model within the department.

5.3.3 Organisational Capacity

Structural Capacity Constraints

The approved structure indicates that the Tourism Chief Directorate consists of a limited number of posts relative to its mandate, including a Chief Director and two primary directorates supported by a small number of technical and administrative staff.

Importantly, within the **Directorate: Tourism Planning and Regulations**, one of the key posts responsible for **tourism research and information management is currently vacant**. This is a critical gap, as this function underpins:

- Evidence-based policy development
- Market intelligence
- Monitoring and evaluation
- Strategic planning

Research and Information Management Gap

The absence of dedicated capacity in tourism research and knowledge management is not an isolated operational issue but reflects a broader structural weakness. The Tourism Growth Strategy (TGS) process identified **limited tourism research, data systems and information management capacity** as a core constraint affecting the province's ability to plan, monitor and grow the tourism sector effectively.

This gap has several implications:

- Weak evidence base for strategic decision-making
- Limited ability to track tourism performance and trends
- Reduced capacity to support investment facilitation
- Challenges in aligning marketing, product development and planning

Broader Departmental Capacity Pressures

The protected areas memorandum highlights structural challenges including shared management arrangements, vacant posts and limited operational staffing (LEDET, 2023).

Implications

The Tourism Branch operates within:

- A small organisational footprint
- A resource-constrained environment
- A department with significant operational responsibilities

Combined with the identified research capacity gap, this limits its ability to:

- Drive large-scale tourism development
- Coordinate across government
- Deliver complex programmes
- Establish robust monitoring and evaluation systems

5.3.4 Budget Analysis

Departmental Budget Context

LEDET operates within an overall budget envelope of approximately R2.0–R2.1 billion per annum.

Tourism Programme Allocation

Programme 4: Tourism receives approximately R138.149 million in 2025/26. In addition, the Limpopo Tourism Agency receives funding through departmental transfers.

Budget Interpretation

Tourism receives a relatively modest allocation within the broader departmental budget. A substantial proportion of resources is directed towards environmental management and operational functions, limiting funding available for tourism growth initiatives.

5.3.5 Infrastructure and Asset Management

The biodiversity structure confirms that tourism infrastructure and commercial tourism activities are managed within conservation systems (LEDET, 2022).

The protected areas system reflects significant infrastructure and operational challenges, including dilapidated facilities, maintenance backlogs and limited revenue generation.

5.3.6 Institutional Fragmentation

Tourism delivery involves multiple institutions, including:

- LEDET
- Limpopo Tourism Agency
- Municipalities
- Other provincial departments
- National bodies such as South African Tourism

This results in fragmented accountability and weak coordination.

5.3.7 Comparative Provincial Analysis

Overview of Provincial Models

Provincial tourism governance structures fall into three broad categories:

- Dedicated tourism model (Western Cape, Gauteng)
- Agency-based hybrid model (Eastern Cape, Mpumalanga, North West)
- Combined department model (Limpopo, KwaZulu-Natal, Free State, Northern Cape)

Comparative Tourism Budgets

At a national level, the Provincial Budgets and Expenditure Review confirms that tourism expenditure across provinces is generally a relatively small component of provincial economic development budgets and is often subject to reprioritisation pressures (National Treasury, 2025).

Western Cape

Tourism is supported through both the Department of Economic Development and Tourism and the agency Wesgro. Wesgro receives approximately R396.9 million over the medium-term expenditure framework, reflecting a strong, dedicated tourism and investment promotion capability (Western Cape Government, 2026).

Gauteng

Tourism delivery is primarily through the Gauteng Tourism Authority, supported by a department with a budget of approximately R1.8–R1.9 billion. While tourism-specific allocations are not always disaggregated, the institutional model benefits from the absence of a parks management burden (Gauteng Tourism Authority, 2024).

Eastern Cape

The Department of Economic Development, Environmental Affairs and Tourism operates with a budget of approximately R1.8–R1.9 billion, with tourism and parks functions largely delivered through the Eastern Cape Parks and Tourism Agency (Eastern Cape Provincial Treasury, 2025).

Mpumalanga

The Department of Economic Development and Tourism has a budget of approximately R1.3–R1.4 billion, supported by the Mpumalanga Tourism and Parks Agency. This model integrates tourism and conservation functions within an agency structure (Mpumalanga Government, 2025).

North West

The Department of Economic Development, Environment, Conservation and Tourism operates with a budget of approximately R1.0 billion, including approximately R232 million allocated to the North West Parks and Tourism Board, which manages both parks and tourism delivery (North West DEDECT, 2024).

KwaZulu-Natal

Tourism is embedded within Programme 3: Trade, Sector and Tourism Development, with a combined allocation of approximately R580 million. However, this is not a tourism-only budget, as it includes broader economic functions (KZN EDTEA, 2025).

Free State

Tourism is delivered through a combined departmental and entity model, with the Free State Gambling, Liquor and Tourism Authority responsible for marketing and promotion. Tourism funding is integrated with regulatory functions (FSGLTA, 2024).

Northern Cape

Tourism funding is relatively limited, with approximately R18 million allocated to tourism support initiatives in 2025/26, reflecting a smaller-scale tourism economy (Northern Cape Government, 2025).

Limpopo

Tourism funding is approximately R138.149 million for the Tourism Programme, with additional transfers to the Limpopo Tourism Agency. Compared to other provinces, this allocation is modest relative to the scope of responsibilities (LEDET, 2025).

Comparative Insight

The comparative analysis highlights three key issues:

- Provinces with dedicated tourism agencies and clearer institutional separation (Western Cape, Gauteng) demonstrate stronger tourism delivery capacity
- Agency-based models (Eastern Cape, Mpumalanga, North West) provide better separation between policy and operations
- Combined department models (including Limpopo) are more constrained due to competing mandates and operational burdens

5.3.8 Key Findings

- Tourism is structurally subordinate within an environmental branch
- The tourism function is fragmented
- Tourism funding is modest relative to mandate
- Conservation functions dominate institutional capacity
- Operational responsibilities dilute strategic focus
- Critical gaps exist in tourism research and information management capacity

5.3.9 Implications for the Limpopo Tourism Growth Strategy

The current structure limits:

- Strategic execution
- Programme coordination
- Investment facilitation
- Tourism growth delivery
- Evidence-based planning and monitoring

5.3.10 Conclusion

The Tourism Branch of the Limpopo Department of Economic Development, Environment and Tourism operates within a structurally constrained institutional environment. The approved organisational structure confirms that tourism is embedded within a broader Environmental Affairs and Tourism Branch and is implemented through a relatively small Chief Directorate, supported by additional tourism-related functions located in conservation directorates.



This functional structure reflects a fragmented internal tourism system in which strategy, development, commercialisation and operations are distributed across multiple directorates. The identified vacancy in the tourism research and information management function, together with broader capacity constraints, further limits the ability of the branch to support evidence-based planning and sector growth.

Compared to other provinces, Limpopo's tourism system remains **less differentiated, more operationally burdened** and **relatively under-resourced**. Without structural realignment, strengthened institutional capacity and improved investment in tourism research and information systems, the province's ability to deliver on its tourism growth ambitions will remain constrained.

5.4 Key Insights from the Stakeholder Consultations

As part of the review of the 2018 Limpopo Tourism Growth Strategy and the development of the 2026 - 2030 Strategy, extensive stakeholder engagement sessions were conducted across all five districts.

A total of nine (9) stakeholder consultation sessions were convened across Limpopo's districts, with strong representation from key forums, industry bodies, community structures, traditional leaders and public-sector partners. These engagements provided critical qualitative insights that enriched and validated the analytical findings. In the main, the consultations revealed a consistent view that the 2018 Strategy was not implemented to the extent intended.

Stakeholders described weak execution, limited follow-through, and inadequate dissemination of the Strategy, resulting in low levels of awareness and limited understanding of roles and responsibilities at district and local levels. This lack of visibility contributed to poor ownership of the Strategy and minimal alignment with district and municipal planning instruments, particularly Integrated Development Plans.

Governance and coordination challenges emerged as a central concern. Stakeholders highlighted the absence of clear accountability mechanisms, insufficient monitoring and evaluation, and weak coordination across key departments such as tourism, transport, public works, and safety. Public-private collaboration was also identified as underdeveloped, with limited structured engagement platforms and inadequate involvement of traditional leaders, industry bodies, and local economic "actors" such as mines.

While stakeholders associated the 2018 Strategy with general tourism development, they struggled to identify specific achievements or flagship initiatives. Successes were perceived in broad, non-specific terms, suggesting that the Strategy's impact was more conceptual than tangible. Conversely, areas of failure were more clearly articulated, with infrastructure deficiencies and weak marketing efforts emerging as the most prominent concerns. Stakeholders also noted gaps in community and SMME development, product and route development, and event-driven tourism. Across districts, there was limited recognition of interventions that had made a meaningful local impact, reinforcing the perception that the Strategy did not translate into visible, place-based outcomes.

The engagement sessions further revealed that many stakeholders were unable to pinpoint the underlying reasons for non-implementation, indicating a lack of shared understanding of systemic constraints. However, weak execution, poor communication, limited capacity, and inadequate governance structures were repeatedly mentioned as contributing factors. These challenges were compounded by insufficient coordination and the absence of a robust monitoring framework to track progress and ensure accountability. It was also noted that the Covid-19 pandemic also interrupted the implementation of the 2018 strategy.

Disaster response roles are unclear, with no formal Tourism Disaster Response Playbook or structured coordination mechanism. There is therefore a need to strengthen public-private collaboration, institutional alignment, and establish clear governance protocols for crisis response.

In further consultations with stakeholders involved in **sustainable wildlife use activities, including the hunting sector**, several critical issues were highlighted. Stakeholders reiterated that **all forms of tourism are inherently consumptive**, reinforcing the need for **responsible and sustainable practices** to safeguard ecological integrity and long-term sector viability.

They emphasized the importance of **transparent communication with communities regarding hunting quotas and associated beneficiation mechanisms**, noting that improved awareness would help reduce current levels of poaching in the province. Stakeholders also stressed that the **hunting permitting system in Limpopo requires simplification and streamlining** to enhance compliance, efficiency, and conservation outcomes

Looking ahead to the 2026–2030 Strategy, stakeholders emphasised the need for a more implementation-driven approach. They called for clearer governance arrangements, stronger accountability, and a well-defined monitoring and evaluation system. Improved communication and stakeholder engagement were identified as essential to ensuring that the Strategy is widely understood and actively supported. Stakeholders also stressed the importance of aligning provincial priorities with district and municipal plans, strengthening interdepartmental collaboration, and creating structured platforms for engagement with traditional leaders, industry bodies, and private sector partners.

There was strong support for prioritising visible, high-impact interventions that address infrastructure gaps, improve access, strengthen marketing, and stimulate product development. Stakeholders noted a robust rebound in the self-drive and visiting-friends-and-relatives' markets, underscoring the need to enhance experiences that cater to these segments. Township and rural tourism emerged as key priorities, reflecting a desire to broaden the province's tourism footprint and ensure more inclusive participation. Stakeholders also endorsed the seven domestic growth areas identified in Section 5, confirming alignment between provincial priorities and local market realities.

Stakeholders also highlighted the need to expand support for community-based tourism and SMME development, and to leverage partnerships with mines and other local industries to unlock additional resources. Building institutional capacity at district and local levels was identified as a critical enabler of effective implementation.

Summary of Core Issues Identified

The table below summarises the principal issues raised during the consultation sessions. These have been fully integrated into the detailed situational analysis that follows, ensuring that the Tourism Growth Strategy is grounded in both empirical evidence and stakeholder experience.

Strategic Issue	Description	Impact on Tourism
Governance Fragmentation & Weak Implementation	Weak execution of the 2018 strategy, absence of a robust Monitoring & Evaluation (M&E) framework, and unclear accountability structures. Limited coordination between departments (tourism, transport, public works, safety) and insufficient alignment with district and local tourism associations. Stakeholder consultations highlight unclear institutional roles (e.g. Route Development Committee, cluster governance), weak industry inclusion in implementation, and limited research capacity. Public-private collaboration remains underdeveloped.	Delays implementation, weakens delivery, and results in fragmented interventions that fail to translate strategy into measurable outcomes. Undermines investor confidence and reduces the effectiveness of provincial tourism leadership.
Infrastructure Constraints & Access Limitations	Poor road conditions, inadequate signage, maintenance backlogs, and declining condition of tourism assets (including state-owned reserves and facilities). Airport closures and limited air access further constrain accessibility. Stakeholders raised concerns about deteriorating facilities, lack of grading compliance, and weak enforcement of standards. Cross-departmental coordination is required to address infrastructure delivery, maintenance, and service standards.	Reduces accessibility, increases travel time and costs, and negatively impacts visitor experience and satisfaction. Constrains investment and limits the competitiveness of key tourism nodes and routes.

Weak Branding & Marketing Alignment	Limpopo lacks a strong, unified destination identity. Digital visibility remains low, and marketing efforts are not fully aligned with the Tourism Growth Strategy. Limited integration of clusters and routes into destination messaging. Stakeholders noted outdated destination information, insufficient consultation with product owners, and limited geographic targeting of campaigns.	Limits competitiveness, reduces market visibility, and constrains demand growth across domestic and international markets. Weakens brand credibility and reduces conversion from marketing efforts.
Cluster Misalignment & Product Development Gaps	Existing tourism clusters remain relevant but require clearer definition, governance structuring, and alignment with market demand. Limited product diversification, packaging, and quality assurance. Key growth areas include adventure, wellness, culture, MICE, religious tourism, agri-tourism, and gastronomy. Stakeholders highlighted weak product audits, low grading uptake, and underutilised tourism assets requiring revitalisation.	Reduces visitor spend, limits length of stay, and constrains the development of high-value tourism experiences. Weak product-market fit reduces competitiveness and repeat visitation.
Weak Route Development & Spatial Integration	Tourism routes remain underdeveloped as tools for geographic dispersal and SMME inclusion. Lack of coordinated planning, unclear institutional responsibility, weak stakeholder consultation, and limited use of GIS mapping. Stakeholders emphasised the need to revive the Route Development Committee, define route readiness criteria, include additional routes (e.g. Bolobedu, overlanding routes), and integrate routes with product development and refurbishment of assets.	Limits dispersal of visitors, reduces regional economic benefits, and restricts opportunities for local enterprise development. Weakens the ability to structure and market integrated tourism experiences.
Domestic Tourism Underutilisation & Inclusion Gaps	Strong rebound in domestic tourism (particularly VFR and self-drive), but limited structured development of township, rural, and community-based tourism offerings. Seven domestic growth areas have been identified but require coordinated implementation. Stakeholders emphasised the need to expand campaigns beyond the province and improve inclusion of SMMEs and local enterprises.	Lost opportunities to grow domestic tourism, reduce seasonality, and drive inclusive participation in the tourism economy. Limits resilience and broad-based economic impact.
Events & Special Interest Tourism Underdevelopment	Significant opportunities in business events (MICE), religious tourism, wellness, astro-tourism, and niche segments remain underdeveloped. Lack of a structured events calendar, weak coordination, and insufficient institutional support. Stakeholders highlighted the need for a Limpopo Convention Bureau, improved grading of conference facilities, and stronger alignment with national MICE frameworks.	Missed high-yield market opportunities, reduced off-peak demand, and limited positioning in the business events sector. Constrains diversification and revenue growth.
Stakeholder Misalignment & Limited Partnerships	District and local plans are not consistently aligned with the Tourism Growth Strategy. Limited engagement with private sector stakeholders, tourism associations, traditional leaders, and industry bodies. Stakeholders highlighted lack of consultation in product development and marketing, and weak integration of industry into implementation. Insufficient leveraging of mining Social and Labour Plans (SLPs) and partnerships for tourism development.	Restricts access to land, funding, and partnerships, and weakens coordinated implementation at local level. Reduces the effectiveness of tourism interventions and limits scale.
Skills Shortages & Service Quality Constraints	Shortage of trained tourism professionals, including guides, hospitality staff, and destination managers. Limited capacity building programmes aligned with industry needs. Stakeholders highlighted gaps in research capability, product quality verification, and compliance with grading standards.	Impacts service quality, visitor experience, and destination competitiveness. Reduces ability to deliver high-quality, market-ready tourism experiences.
Municipal Service Delivery Failures	Inadequate service delivery, poor maintenance of public spaces, and weak enforcement of by-laws in tourism areas. Declining condition of tourism infrastructure and facilities at municipal level.	Damages destination image, reduces visitor satisfaction, and discourages investment. Undermines the overall tourism value proposition.
Market Underutilisation & Data Limitations	Untapped or underdeveloped segments including domestic leisure, events, religious tourism, wellness, and niche special-interest markets. Limited packaging and targeted marketing. Stakeholders raised concerns about outdated and insufficient statistics, limiting evidence-based planning and decision-making.	Lost growth opportunities, reduced diversification of the tourism economy, and lower resilience to market shocks. Weak data undermines strategic planning and investment prioritisation.

5.4.1 Overview of Recommendations from Stakeholder Consultations

Strengthen Implementation, Accountability, and M&E

- Establish clear implementation responsibilities across provincial, district, and local levels, with defined timelines, deliverables, and measurable performance indicators linked to cluster and route outcomes.
- Introduce a structured provincial–district Monitoring and Evaluation (M&E) framework, including quarterly reporting, performance dashboards, and feedback loops aligned with Tourism Forum processes.
- Clarify institutional roles and governance structures, including the positioning of the Route Development Committee within implementation working groups.
- Strengthen research capacity and ensure the use of credible, up-to-date tourism data to inform planning, targeting, and performance tracking.

Improve Communication and Stakeholder Engagement

- Develop a structured communication and stakeholder engagement plan to ensure that all stakeholders clearly understand the Strategy, cluster frameworks, and their respective roles in implementation.
- Formalise engagement with traditional leaders, tourism associations, product owners, and private sector stakeholders to ensure inclusive and participatory implementation.
- Institutionalise consultation processes in destination marketing, route development, and product packaging to address gaps identified in stakeholder participation.
- Ensure that destination information, marketing content, and product databases are regularly updated, accurate, and reflective of current conditions.

Enhance Intergovernmental and Cross-Sector Coordination

- Align TGS priorities with Integrated Development Plans (IDPs), Spatial Development Frameworks (SDFs), and district tourism plans to ensure integrated planning and budgeting.
- Strengthen coordination across tourism, transport, public works, safety, and environmental management to improve infrastructure delivery, access, and visitor experience.
- Integrate municipalities into planning and marketing initiatives to ensure local-level ownership and alignment.
- Clarify departmental roles in key functions such as route development, infrastructure rehabilitation, and tourism asset management.

Prioritise Visible, High-Impact Interventions

- Prioritise infrastructure upgrades, including roads, signage, and maintenance of tourism assets, with a focus on improving access and visitor experience.
- Accelerate the revitalisation and rehabilitation of key tourism assets, including state-owned nature reserves and underperforming sites.
- Invest in coordinated marketing campaigns, product development, and event attraction strategies to stimulate demand and reposition Limpopo in key markets.
- Strengthen route development as a delivery mechanism, including the identification of priority routes (e.g. Bolobedu and legacy routes), establishment of route readiness criteria, and integration of routes with product packaging and infrastructure investment.

Support Community and SMME Participation

- Expand enterprise development programmes, market access initiatives, and community-based tourism support, with targeted interventions to improve uptake of programmes such as the Market Access Support Programme (MASP).
- Facilitate inclusion of SMMEs in trade platforms, events, and destination marketing initiatives, supported by capacity building and financial support mechanisms.
- Encourage partnerships with mining companies and other local industries to leverage Social and Labour Plans (SLPs) and infrastructure investment for tourism development.
- Promote the development of township, rural, and niche tourism offerings, including agri-tourism and religious tourism, to drive inclusive growth.

Build Capacity and Institutional Readiness

- Strengthen district tourism units, tourism associations, and local tourism organisations to lead implementation at local level.
- Provide targeted training on implementation planning, reporting, M&E systems, and tourism product development.
- Improve quality assurance systems, including grading uptake, product audits, and compliance with tourism standards, particularly for accommodation and conference facilities.
- Build institutional capacity to support priority growth areas such as MICE, including consideration of a provincial convention bureau and improved coordination with national frameworks and industry bodies.

5.5 Macro-Economic Environment Overview

The macro-economic environment shapes the enabling conditions within which Limpopo's tourism sector operates. Globally, 2025 is marked by a moderate but uneven economic recovery following post-pandemic adjustments, with global GDP growth projected at roughly 2.5–2.8 per cent (IMF 2025; World Bank 2025). Inflation has eased but remains above target in many economies, while trade volumes and investment flows are constrained by geopolitical tensions, rising protectionism, and supply-chain realignment.

In South Africa, growth remains subdued yet stabilising. Real GDP is forecast at 1.5–1.8 per cent in 2025, supported by improved energy reliability, logistics reform, and the confidence generated by the Government of National Unity. Inflation is within the Reserve Bank's 4–6 percent band, while fiscal consolidation and governance reforms are improving investor sentiment. Tourism continues to be recognised nationally as a high-impact, employment-intensive sector central to inclusive growth. The broader policy landscape, anchored by the NDP 2030, GAIN Framework, and TSMP 2023, places tourism at the intersection of industrialisation, infrastructure development, and small-business empowerment.

The escalation of conflict in the Middle East has intensified volatility in global oil and shipping routes, contributing to higher fuel prices and increased aviation operating costs. These pressures translate into elevated airfares and potential adjustments to long-haul routing, particularly on services that traditionally connect via Gulf hubs. While South Africa remains a safe and accessible destination, the cumulative effect is a relative increase in travel costs and reduced convenience for selected international markets.

Global travellers often respond to geopolitical instability with heightened caution, and conflict in one region can influence perceptions of destinations far beyond the immediate area. This environment encourages shorter booking windows, greater demand for flexible products, and a more conservative approach to long-haul travel planning. Reduced outbound travel from the Middle East and rerouting by European and Asian travellers may soften growth from some long-haul markets. This reinforces the need to diversify source markets and strengthen messaging around safety, reliability, and destination stability.

Higher fuel and logistics costs contribute to broader inflationary pressures within South Africa, constraining disposable income for both domestic and regional travellers. Corporate travel budgets may also be reprioritised away from long-haul incentive and conference travel. These dynamics heighten price sensitivity across key market segments and increase the importance of value-for-money offerings, bundled products, and competitive pricing strategies.

Limpopo's tourism performance is closely linked to the accessibility of the OR Tambo International Airport gateway and the affordability of road-based travel. Any reduction in international seat capacity or sustained increases in airfares into Johannesburg directly affects the province's competitiveness, particularly for long-haul leisure, hunting, and eco-tourism markets. Rising fuel prices also place pressure on self-drive and coach-based travel, which are central to Limpopo's tourism economy. This may dampen demand for remote attractions and multi-country circuits that rely on cross-border mobility.

The province's strong domestic and SADC markets provide a buffer against global volatility, and targeted positioning around nature-based, cultural, and authentic rural experiences can help sustain demand during periods of international uncertainty.

Emerging markets, especially in Africa and Asia, are driving growth through service diversification, digitalisation, and intra-regional trade. For tourism, these conditions reinforce demand for value, sustainability, and authenticity, as travellers become more cost- and climate-conscious.

Figure 4: Macro Economic Environment



Within Limpopo Province, the economy remains resource- and agriculture-based, but tourism contributes significantly to diversification, rural employment, and SMME participation. The province benefits from its strategic location within the SADC regional corridor, its proximity to major conservation areas, and its involvement in Transfrontier Conservation initiatives, such as the Greater Limpopo TFCA. However, vulnerabilities persist: limited infrastructure investment, high transport costs, skills shortages, and fiscal constraints restrict competitiveness and limit the multiplier effect of tourism spending.

Strategic implications for the Limpopo Tourism Growth Strategy (2026–2030) include:

- **Strengthening Provincial Tourism Resilience**

Given the current geo-political context and conflicts, Limpopo must strengthen its resilience by promoting clustered experiences that reduce travel distances while increasing the value of each trip. Encouraging longer stays, supporting fuel-efficient routing, and collaborating with operators to optimise logistics will be essential.

- **Economic diversification**

Tourism must act as a stabiliser within a volatile macro-environment, linking to agriculture, conservation, and cultural industries.

- **Investment promotion**

Limpopo must leverage national recovery momentum to attract sustainable and impact-driven investment into priority clusters.

- **Infrastructure acceleration**

There is a need to align with the national infrastructure pipeline to improve access roads, airports, and digital connectivity, which is critical for competitiveness.

- **Climate Resilience building**

The province must develop climate-adaptation and crisis-management mechanisms to mitigate global economic and environmental shocks.

- **Skills and productivity enhancement**

Aligning human-capital development with the provincial economic growth agenda.

- **Evidence-based investment prioritisation**

Capital allocation must be directed towards tourism projects that align with national recovery and provincial growth sectors.

- **Disaster and Risk Management and Scenario planning**

Enabling adaptive responses to disaster, inflation, exchange-rate volatility, and global demand shifts is critical.

- **Cross-sectoral integration**

The province needs to ensure that tourism development contributes to broader economic goals such as industrialisation, skills development, and infrastructure modernisation.

- **Sustainability and inclusivity**

Embedding green growth, local ownership, and SMME participation in all tourism value chains is a critical pillar for sustainability and inclusivity.

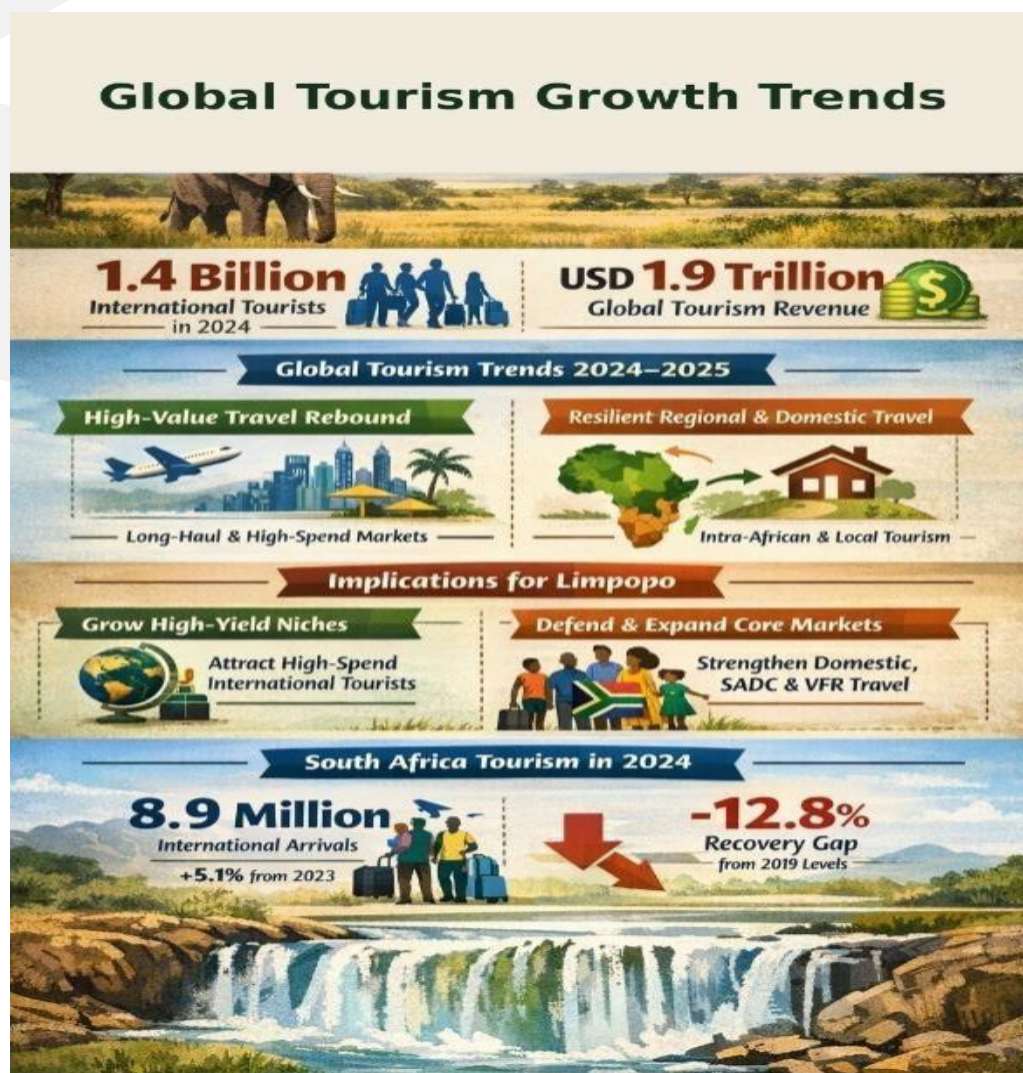
In essence, the macro-economic analysis underscores that Limpopo's tourism growth trajectory will depend on its ability to integrate with national economic reform priorities while capitalising on global recovery trends. The 2026–2030 Tourism Growth Strategy will translate these macroeconomic signals into targeted actions that strengthen resilience, inclusivity, and the province's long-term positioning as a leading sustainable tourism destination in Southern Africa.

5.6 Market Analysis

5.6.1 Global Tourism Overview

Global tourism in 2024–2025 has largely rebounded to near pre-pandemic levels, supported by a strong return in both international arrivals and tourism receipts, with an estimated 1.4 billion international tourists recorded in 2024 and export revenue from global tourism estimated at USD 1.9 trillion, surpassing 2019 receipts in real terms. This recovery is not uniform, however: long-haul, high-spend markets have returned strongly, but short-haul, regional, and cross-border travel (especially intra-regional African and domestic travel) remain the most resilient volume drivers during periods of shock. The global picture is therefore characterised by two simultaneous trends; a return of high-value international travel and the structural entrenchment of regional and domestic tourism as core stabilisers. This has direct implications for Limpopo: it must grow its share of high-yield international niches while deliberately defending and growing domestic, SADC, and VFR (visiting friends and relatives) markets that provide reliable volume. In 2024, international arrivals to South Africa increased by 5.1% from 2023, reaching a total of 8.9 million. This trend marks the highest number of international tourist arrivals since 2019, leaving a marginal recovery gap of -12.8%.

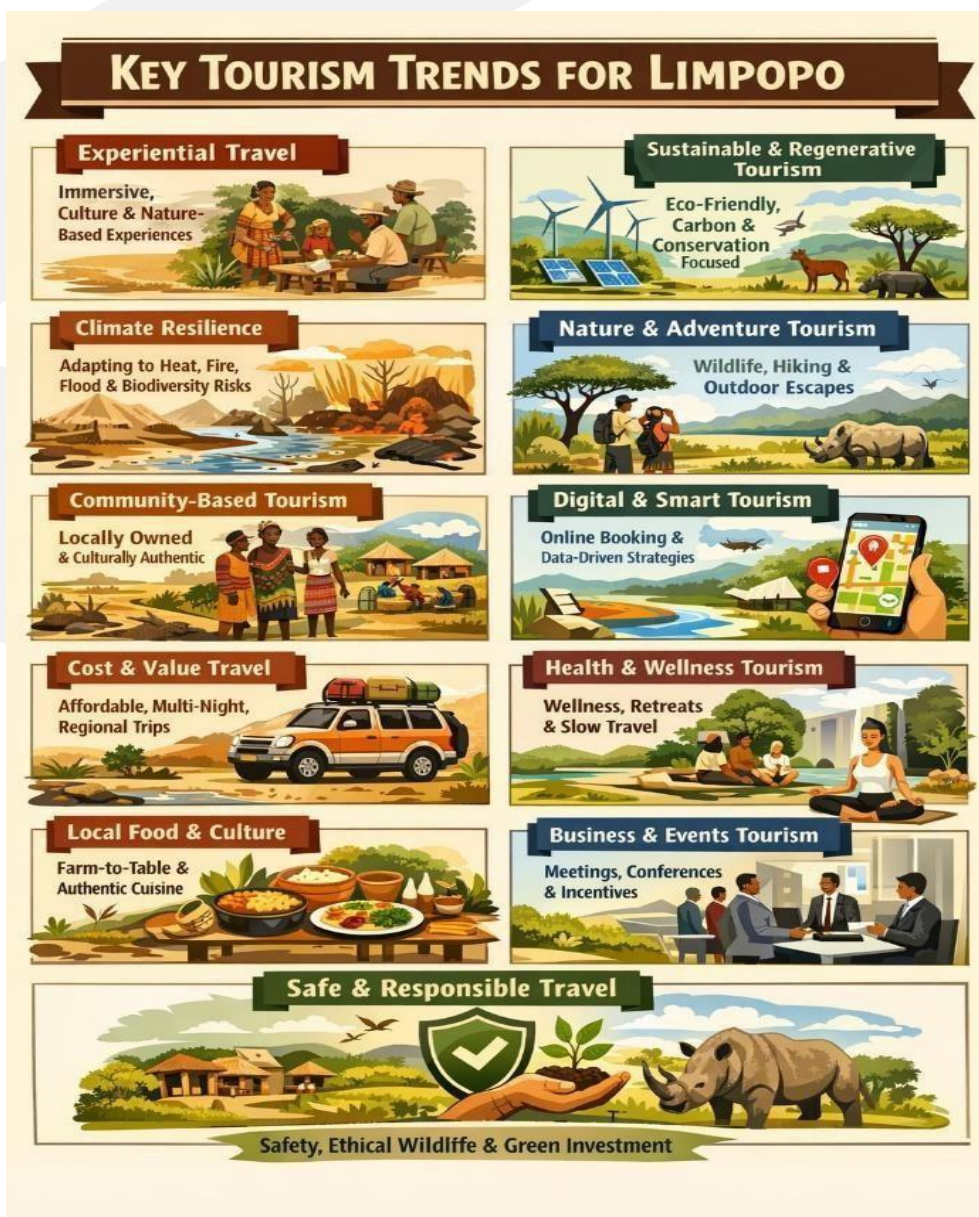
Figure 5: Global Tourism Growth Trends



5.6.2 Key Tourism Trends and Developments

Key tourism trends and developments are reshaping the competitive landscape in ways that directly influence Limpopo's growth trajectory. Global shifts in traveller behaviour, technology, sustainability, and market demand are redefining how destinations position themselves and attract visitors. At the same time, national and regional dynamics are creating new opportunities for product diversification, investment, and route development. This section highlights the most significant trends shaping the future of tourism and their implications for Limpopo's strategic direction.

Figure 6: Key tourism trends & developments



A demand for experiences, not just sights

Travellers are increasingly motivated by immersive, story-rich, place-based experiences

(culture, nature connection, community interaction) rather than passive sightseeing, which means Limpopo must package guided, hosted, meaning-driven, and indigenous experiences rather than only sell "attractions."

Sustainability, stewardship and "regenerative" tourism are non-negotiable

The market now expects destinations not just to avoid harm but to actively consider carbon-neutral or carbon-negative travel by considering options that reduce emissions or offset them and also restore ecosystems, deliver demonstrable social benefit, making environmental credibility, ethical wildlife management, and community revenue-sharing central to Limpopo's brand competitiveness.

Climate risk and resilience

Climate volatility, water stress, heat, fire, flood, and biodiversity loss are now core tourism risks, forcing destinations to adapt infrastructure, diversify seasons, and position themselves as safe, climate-conscious choices.

The demand for nature and outdoor tourism is rising

There is surging demand for open-space, wildlife, wilderness, hiking, and restorative outdoor experiences; which serves as a boost for Limpopo's conservation estates, game farms, biosphere reserves, and World Heritage landscapes.

Community-based and inclusive tourism

Markets (especially long-haul Europe/US and African middle-class travellers) increasingly seek travel that is socially just, locally owned, and culturally authentic, which elevates township/rural nodes, heritage storytelling, traditional knowledge, and craft economies from "add-ons" to core product assets.

Technology, distribution, and data

Digital discovery, dynamic pricing, direct booking, reputation platforms, AI-enabled targeting, and reliable data for decision-making have become foundational, meaning Limpopo destinations and operators cannot remain analogue if they expect to reach and convert demand at scale.

Travel costs and the economic environment

Persistently high travel costs (airfares, fuel, visas, insurance) are reshaping consumer choices toward closer, better-value, bundled, multi-purpose trips — which favours drive markets, regional cross-border tourism, and multi-night stays in single nodes.

Business and other events

The global business-events, incentive, meetings, and conferencing market remains high-value and has recovered in hybrid form: destinations that can host serious business in authentic, differentiated locations—and package pre/post leisure—are outperforming the rest.

Safety, health and governance

Visitor decisions are strongly shaped by perceptions of personal safety, health system

responsiveness, ethical wildlife practice, and general governance quality; reputational harm in these areas directly suppresses demand.

Investment, financing and PPPs oriented to sustainable outcomes

Tourism funding is increasingly tied to demonstrable environmental stewardship, inclusive ownership, green infrastructure, and credible governance both in terms of legal compliance and standards, which means Limpopo's future pipeline must be packaged as investable, impact-positive, and compliant.

Skills shortage and professionalisation of the workforce

Global and national markets face skills gaps in guiding, hospitality, events, digital marketing, compliance, and management, so destinations that can reliably offer professional service quality through training and accreditation gain a structural advantage. In the case of South Africa, where unemployment levels are high, the focus now should be on aligning and linking trained professionals to the market.

Remote workers

The rise of mobile professionals and "work-from-anywhere" travellers is blurring the lines between leisure and residency, creating opportunities for longer-stay, lifestyle-led tourism in safe, nature-rich, connected environments like Limpopo's biosphere and heritage landscapes.

Wellness, Health and slower pace

Rise of travelling for wellness (mental health, well-being, detox, retreats, nature immersion) is growing stronger.

Authentic local food, culture and supply chains

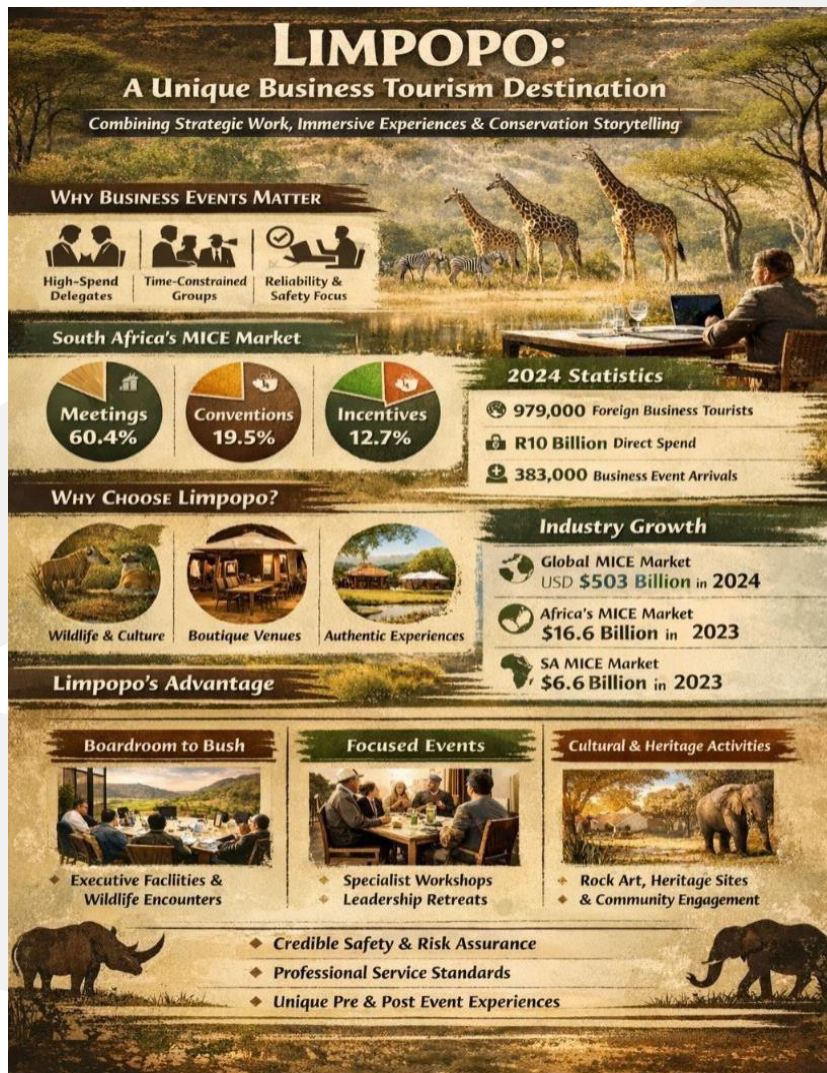
Travellers are increasingly choosing destinations/ restaurants that use local produce, respect local culture and have low environmental footprints.

5.6.3 Business and Other Events

Business events—meetings, incentives, conferences, exhibitions, corporate retreats, and government or association gatherings—are a high-value tourism segment because delegates spend more, travel in organised groups, and work with fixed budgets. The Growth Strategy notes two key features of this market. First, organisers prioritise certainty: reliable venues, smooth logistics, guaranteed safety, and accredited suppliers matter more than glamour. Second, incentives and corporate off-sites now favour immersive, authentic, place-based experiences over standard hotel functions.

This is where Limpopo stands out. It can position itself as a distinctive alternative to major convention cities by pairing boardroom-ready facilities and private executive spaces with immediate access to wildlife, culture, and conservation storytelling. The latest developments in the provision of high-speed internet enhance this opportunity. This blend of strategic work, leadership bonding, and high-end reward travel aligns strongly with global incentive trends.

Figure 7: Business & other events



South African Tourism reports that the meetings segment dominates Africa's MICE market, accounting for 60.4% of the market share, followed by conventions (19.5%) and incentives (12.7%). The incentives market, which is experiencing the highest growth rate at 17.2%, reflects the growing trend toward rewarding employees and clients through immersive travel experiences. The South African business travel market accounted for 11% of foreign tourists (979,000 in 2024) and more than R10 billion in direct foreign tourism spend. The business events component of South Africa's foreign business tourism market accounted for 5.9% of total arrivals, or approximately 383,000 tourists, in 2024.

South Africans undertook approximately 123 million domestic day trips in 2024. Of these, 9.7 million were professional business trips and 4.1 million were for MICE or Business Purposes. (SAT: 2024). Domestic tourism trips were estimated at close to 40.2 million, with spending of over R136 billion. Domestic business travel accounted for approximately 5% of these figures (Professional, MICE, and Purchasing). The MICE or business events component accounted for 1.6% of this market. The average spend on a business event trip was R4910.00 (SAT, 2024).

Global Growth Insights estimates the international MICE market at USD 503.06 billion in 2024, with modest growth to USD 512.11 billion in 2025. Business Research Insights confirms a similar figure, pegging it at USD 503.05 billion in 2024, with a projected reach of USD 589.93 billion by 2033.

South African Tourism indicated that in 2023 it was valued at \$523.3 billion (R9.7 trillion) and is projected to reach \$1,384.9 billion (R25.5 trillion) by 2032, with an impressive compound annual growth rate (CAGR) of 11.4% from 2023 to 2032.

Africa shows promising growth. Africa's business events industry was valued at \$16.6 billion (R295 billion) in 2023 and is projected to reach \$65.6 billion (R1.2 trillion) by 2032, at a compound annual growth rate of 16.8%. South Africa's MICE industry was valued at \$6.6 billion (R121.8 billion) in 2023 and is expected to reach \$25.9 billion by 2028.

The national business-events landscape is also evolving. South Africa's domestic MICE (Meetings, Incentives, Conferences, and Exhibitions) and incentive industry has largely recovered and is now supported by both public-sector and corporate demand. Within that, there is growing pressure to distribute meetings and incentives beyond traditional metros, to demonstrate transformation, localisation, and social impact. This is critical for Limpopo: it can position its nature reserves, heritage sites, religious centres, resorts, and hunting/game estates as settings for executive incentives, specialist technical workshops (e.g. conservation, mining, biodiversity finance), and leadership retreats. The province can also tap specialised sub-segments — faith gatherings, sporting congresses, agriculture and wildlife management conferences, cultural heritage colloquia — which align with Limpopo's comparative advantage and do not necessarily require a 5,000-seat convention centre. MSMEs within the province should be capacitated to compete in the MICE market through the implementation of infrastructure incentives, prioritisation, and marketing.

Strategically, this means that "business events" in Limpopo should not be treated only as classic large-scale conferencing (which is still dominated by metros with major convention centres), but as a layered opportunity: (1) small to mid-scale technical and policy convenings hosted close to field assets; (2) incentive travel combining high-end leisure, exclusivity, and access to wildlife; and (3) purpose-led events that explicitly link to Limpopo's brand pillars — conservation, culture, heritage, land reform, inclusive growth. Success in this segment relies on three enablers flagged in the report: (i) credible safety and risk assurance; (ii) professional service standards and accreditation in venues, guides, and ground-handling; and (iii) the ability to package compelling pre- and post-event experiences (wildlife, rock art, heritage routes, spiritual/religious sites, golf-and-game, etc.). Limpopo's ability to present itself as both "serious and unique" is therefore central to unlocking higher-yield visitors and year-round demand, especially in shoulder seasons.

5.6.4 Tourism Recovery, Growth and Demand Shifts

5.6.4.1 Global market

The global tourism market has normalised mainly in terms of arrivals and receipts, with approximately 1.4 billion international tourists in 2024 (99% of pre-pandemic levels) and receipts exceeding pre-2019 performance in real terms. This confirms that tourism has resumed its role as a major global export sector, but with new expectations around sustainability, authenticity and safety.

5.6.4.2 International Arrivals and Receipts

High-yield, long-haul travel from North America and Europe has recovered strongly, and there is renewed interest in African nature, wildlife, culture, and "purpose travel," while short-haul regional travel remains a stabiliser during shocks.

5.6.4.3 Regional Performance

Africa, and Southern Africa specifically, continues to benefit from strong intra-regional flows driven by proximity, ease of access (especially road-based and cross-border), cultural affinity, and VFR travel; this creates resilience for Limpopo given its SADC adjacency and role as a gateway to Kruger, Mapungubwe, and transfrontier conservation areas.

5.6.4.4 The Current Performance of the South African Tourism Market

South Africa's overall tourism performance has improved, both in terms of international recovery and a robust domestic market that continues to drive volume, but it remains exposed to constraints such as airlift cost, perceptions of safety, and infrastructure reliability.

Figure 8: The Performance of the South African Tourism Market



5.6.4.4.1 International Tourism Market

In 2025, South Africa's tourism sector reached record growth, with international arrivals surpassing 10 million for the first time (10.48 million from January to December). This increase was driven by strong results in African land and air markets, as well as a notable recovery

from Europe and North America. Between January and September 2025, international arrivals totalled 7,634,261, an increase of over 1.1 million compared to the same period in 2024. Arrivals from Africa's land markets grew by 26.7%, Africa's air markets by 28%, Europe by 29%, and North America by 22%.

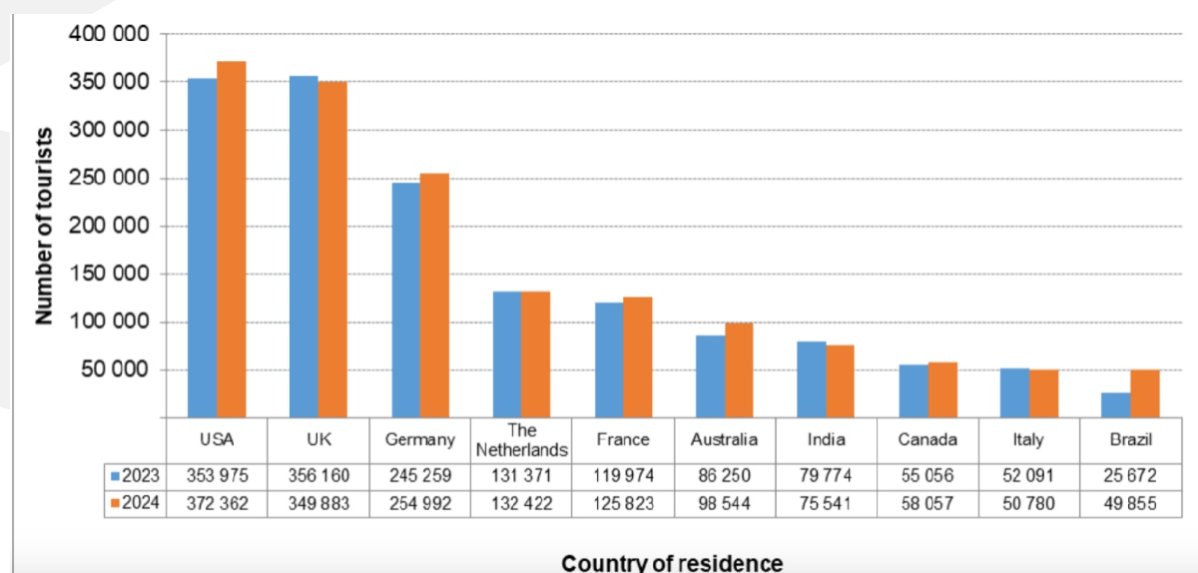
In September 2025, there were 846,367 visitors, a 26.9% increase from September 2024. Zimbabwe remained the top source market, while the United Kingdom saw 7.4% growth in early 2025.

Visitors continue to prioritise wildlife, culture, heritage, and unique experiences. Limpopo is well positioned in this space but competes directly with other provinces for length of stay, spend, and iconic "must-see" status.

5.6.4.4.1 Top Ten SADC Source Markets (2024)

The figure below shows the ten leading countries for tourists from the SADC region in 2024.

Figure 9: Top SADC Source Markets



(Source: South African Tourism)

5.6.4.4.2 Domestic Tourism Market

Domestic tourism remains a cornerstone of stability: South Africans (and regional visitors from neighbouring states) are travelling for family, religious gatherings, shopping, and leisure road trips, often in multi-generational groups. This behaviour directly benefits Limpopo's resorts, pilgrimage nodes, cross-border shopping, game farms, and family-oriented leisure destinations. Total domestic overnight trips continue to show year-on-year positive growth and upward momentum. Despite growth rates slowing in 2023 and 2024, the number of trips increased to 40.2 million in 2024 (a 6.1% rise compared to 2023), up from 34 million in 2022 and 37.9 million in 2023. The South African Tourism quarterly reports for 2025 indicate that the domestic tourism trips for 2025 may have reached some 44.7mn in 2025. This is not yet the official figure for 2025, but it indicates an increase of almost 12%.

In contrast, total domestic day trips have declined by 14.3%, down to 123 million in 2024 (compared to 143.4 million in 2023).



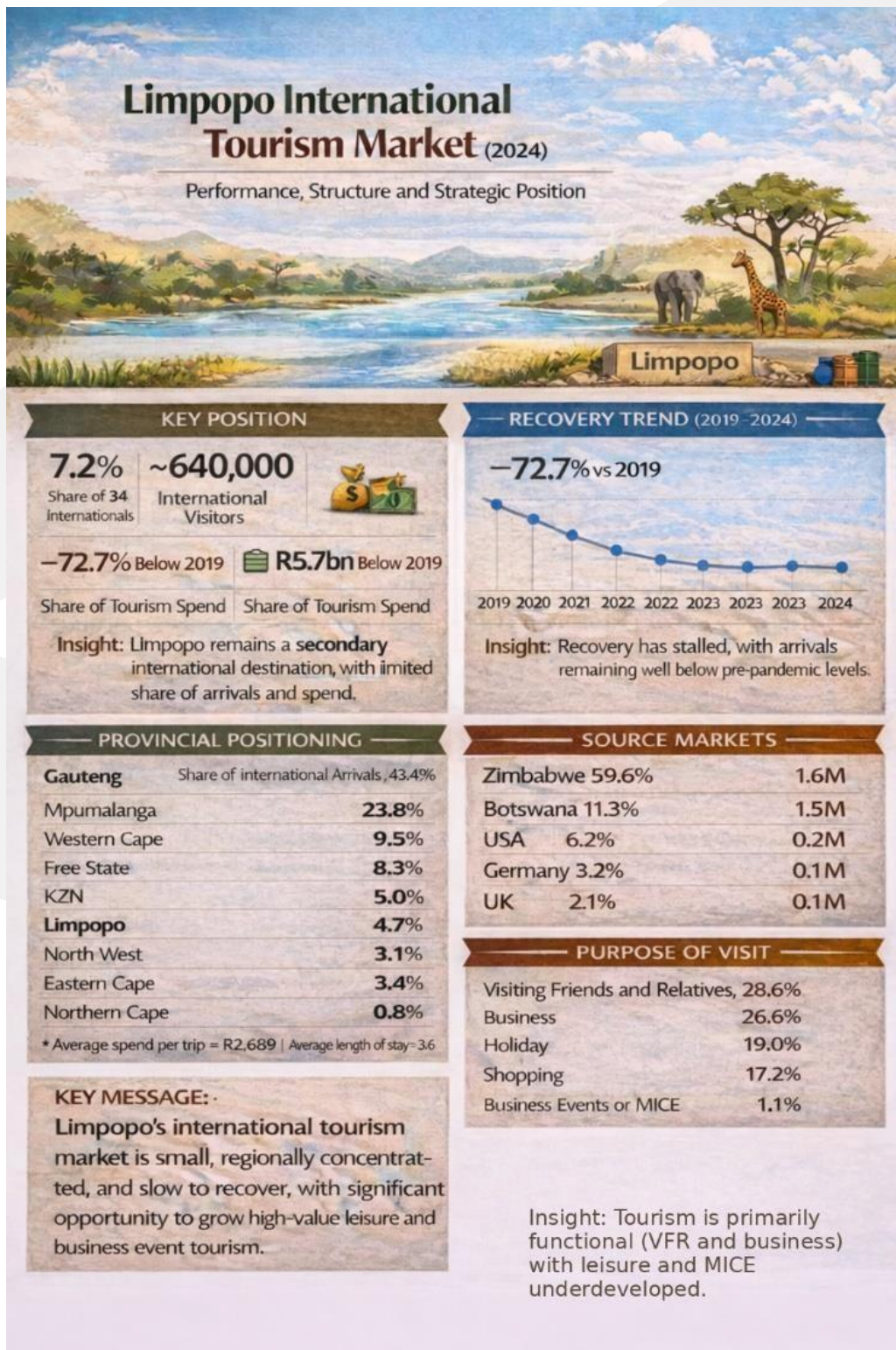
5.6.5 Limpopo's Current Tourism Performance

5.6.5.1 The Limpopo International Tourism Market

Limpopo was one of South Africa's most visited provinces by international tourists, historically recording well over a million international arrivals per year, driven by two main streams: (1) long-haul high-yield visitors seeking wildlife, heritage, and authenticity; and (2) very large regional flows, predominantly from Zimbabwe, Botswana, and Mozambique, often linked to shopping, visiting friends and relatives, transit, and short-break nature-based trips. Limpopo's top long-haul markets include the USA, Germany, the UK, France, and the Netherlands, while emerging prospects exist in Asia and Latin America. These markets are motivated by ecotourism, heritage (e.g., Mapungubwe), and specialised-interest travel (photographic safaris, birding, paleontological and archaeological tourism).

The report notes that Limpopo's positioning within two Transfrontier Conservation Areas, multiple biosphere reserves, and World Heritage and archaeological landscapes gives it leverage over competitors; it can claim authentic, irreplaceable natural-cultural capital. At the same time, it faces pressure to defend this status through credible conservation management, responsible wildlife practices, and improved access and safety.

Figure 10: Limpopo's International Tourism Market



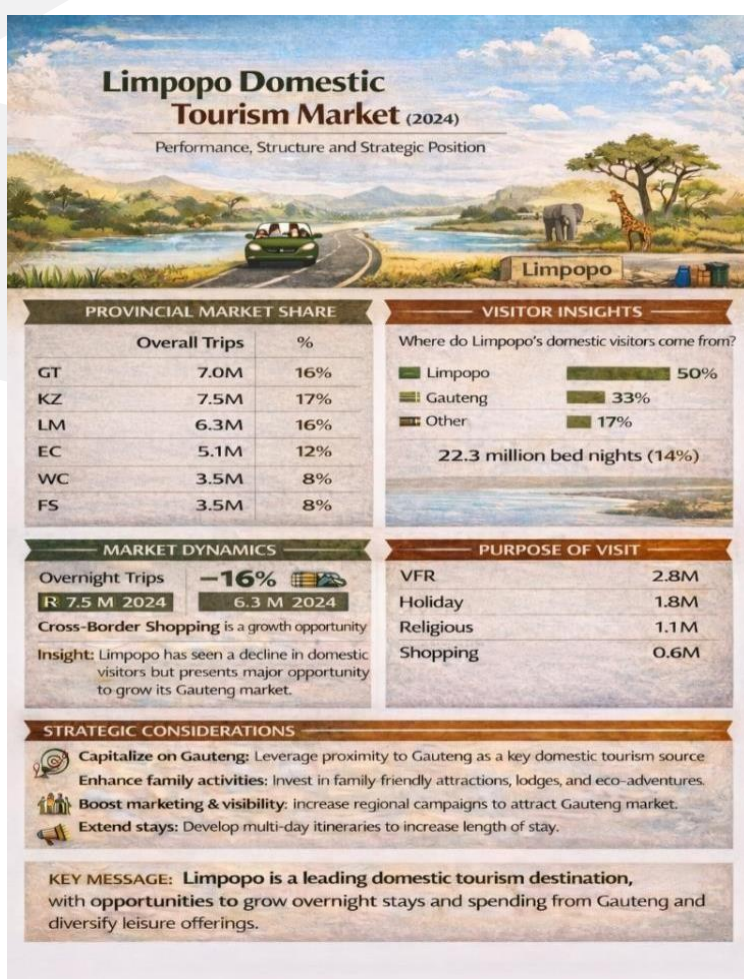
Unfortunately, the Limpopo foreign tourism market is struggling to recover to 2019 levels and even more so than other regions in South Africa. The Limpopo Province also has a small share of South Africa's international tourism arrivals and spending. This share accounted for 7.2% of international tourists, or approximately 640,000 (vs 2.2mn in 2019), and a 6.3% share of expenditure, or R5.7 billion, in 2024. Despite national international tourism recovery reaching

approximately 10.5 million in 2025, Limpopo captured only approximately 418,300 arrivals (+4% share), with total foreign spend of approximately R5 billion. This confirms that the province is not meaningfully participating in South Africa's international tourism recovery.

5.6.5.2 The Limpopo Domestic Tourism Market

Domestic tourism is the province's stabiliser and primary volume engine. Limpopo performs extremely well with South African travellers who come for family visits, religious and spiritual gatherings, shopping, and affordable nature/leisure escapes. The Limpopo Province holds a significant share of the South African Domestic Tourism Market, both in terms of trips (16%) and expenditure (17%). This is similarly true for bed nights (14%). Limpopo province has a slightly shorter length of stay in terms of nights than the national average, namely 3,6 nights. Most provinces experienced growth in domestic overnight trips as destinations compared to 2023. However, Limpopo experienced a decline in trips, from 7.5 million to 6.3 million. **The latest initial data from South African Tourism's domestic market quarterly reports indicate that Limpopo may have achieved 7.6million tourism trips in 2025 this represents growth of some 21%**

Figure 11: Limpopo's Domestic Tourism Market 2024



The province benefits from strong drive-market access from Gauteng, which feeds Bela-Bela resorts, hunting/game farms, family recreation estates, and affordable multi-night stays. Religious and cultural pilgrimage tourism — especially large-scale gatherings — is a powerful and distinctive domestic driver. The domestic segment, however, is highly price-sensitive and seasonal, with strong peaks and comparatively weak shoulder/low seasons. The Tourism Growth Strategy highlights the need to convert domestic visitors from short-stay/low-spend or VFR patterns into longer-stay, higher-yield packaged experiences by improving product bundling (e.g. faith tourism + heritage routes + nature escapes + events).

The consultation sessions revealed that there is a strong rebound in self-drive and VFR markets. Township and rural tourism are a key priority. The seven domestic growth areas identified were supported by the stakeholders in the consultation sessions.

STR Global Hotel Accommodation Performance

Limpopo's hotel sector achieves reasonable occupancy levels, at or above 60%. However, its performance declined when compared to 2023 and 2022 occupancy levels. Growth in terms of ADR and RevPAR has also been marginal. This finding relates to Limpopo's overall performance in terms of both international and domestic arrivals.

Strategic Reading of Limpopo's Performance

Overall, Limpopo already has the raw materials of a globally distinctive destination; biosphere reserves, World Heritage assets, safari and hunting estates, spiritual and cultural pilgrimage sites, archaeological depth, and large-scale cross-border flows. However, the Province is not yet consistently monetising them at their full potential. The province's challenge is not only to attract visitors, but to deepen spend, extend stay, and increase repeat visitation through credibility (safety, standards, conservation ethics), access (roads, airports, border efficiency), packaging (bundled experiences rather than stand-alone attractions), and visibility (digital reach, storytelling, distribution).

5.6.6 Relevance of Tourism Recovery and Demand Shifts

The recovery and restructuring of global, regional, national, and provincial tourism carry direct strategic consequences for Limpopo's Tourism Growth Strategy:

- First, Limpopo must compete for high-yield, values-driven international travellers who are actively seeking authentic wildlife, culture, heritage, archaeology, and community-grounded experiences — which means Limpopo must frame itself as rare, ethical, and meaningful, not generic.
- Second, Limpopo must secure and formalise its role as a major driver of domestic, pilgrimage, regional cross-border, and VFR tourism — these markets give it resilience, cash flow, and political relevance, and cannot be treated as "secondary."
- Third, Limpopo must deliberately counter seasonality and geographic concentration by using events, incentives, learning retreats, and bundled itineraries to push demand into weaker times and places.

- Fourth, Limpopo must position tourism as a provincial economic-development instrument aligned with inclusive growth, youth employment, and SMME empowerment — this is consistent with national policy expectations under the Government of National Unity, the NDP 2030, and the TSMP 2023. Finally, Limpopo must invest in enabling systems: governance clarity, accurate data, integrated marketing, air and road access, safety and compliance standards, and digital visibility. In other words, recovery is not just about "getting back to 2019"; it is about using tourism as a strategic engine for transformation, rural development, and fiscal resilience through 2030.

5.6.7 Limpopo Tourism Supply Side Overview

The supply-side analysis of Limpopo's tourism sector highlights the province's diverse and extensive resource base, encompassing wildlife, culture, heritage, and recreational assets across all five district municipalities. The province is home to more than 50 protected areas, numerous private game reserves, world heritage sites, and globally significant biodiversity hotspots, including the Kruger National Park (Limpopo section), the Waterberg Biosphere, the Kruger-to-Canyons Biosphere, the Vhembe Biosphere Reserve, and the Mapungubwe Cultural Landscape World Heritage Site. These assets form the backbone of Limpopo's tourism offer and underpin its positioning as a premier nature, culture, and heritage destination. The GIS data that defines these assets is available but may need further refinement to be used to spatially represent the assets. This data can be overlaid with various other tourism-related layers to assist with development planning.

5.6.7.1 Accommodation

The accommodation sector consists of an extensive network of establishments, dominated by Micro, Small and Medium Enterprises (MSME). The Waterberg, Mopani, and Vhembe districts account for the bulk of bed capacity, serving key markets such as family leisure, wildlife safaris, hunting, and short-break travel from Gauteng. Game lodges, hunting estates, family resorts, guesthouses, and self-catering units dominate the supply mix, supported by an emerging base of conference venues, cultural attractions, and special-interest facilities.

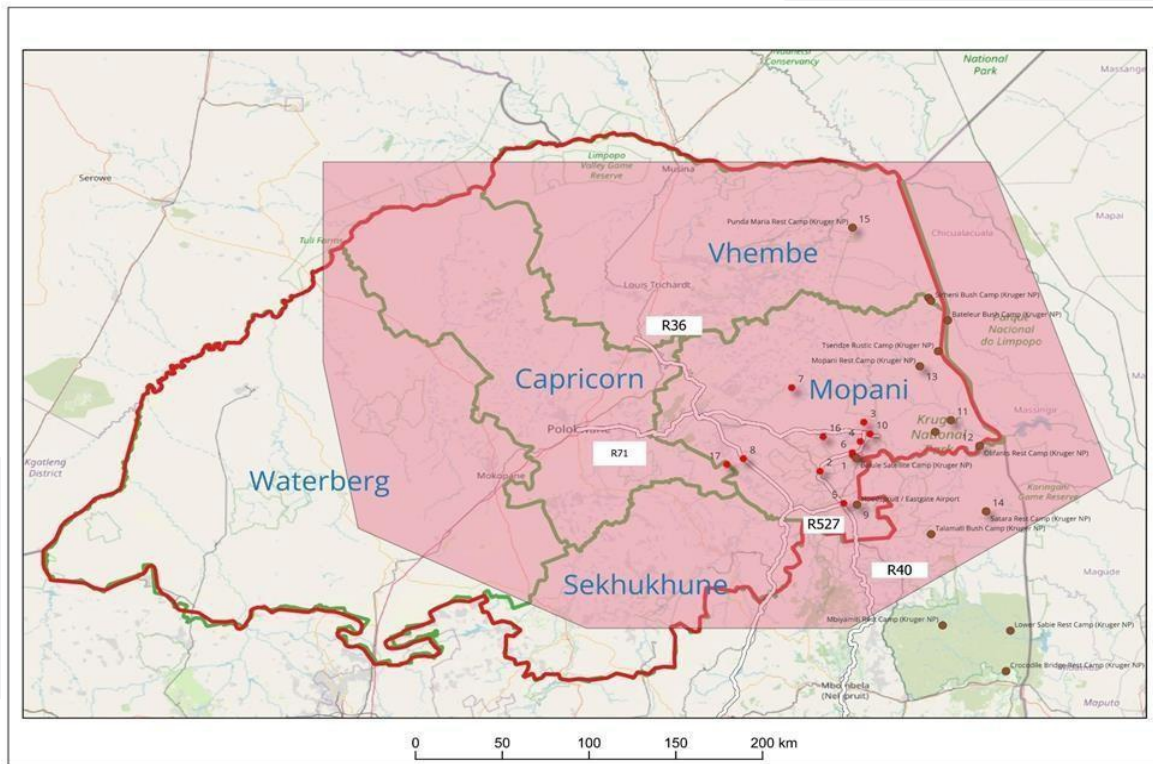
5.6.7.2 Infrastructure

Despite these strengths, spatial disparities persist. Well-developed hubs along primary corridors (such as the N1 north, the Bela-Bela/Modimolle strip, and key gateways into Kruger) contrast sharply with rural nodes where tourism infrastructure, signage, public facilities, and market visibility remain underdeveloped. Secondary and district roads leading to many high-potential attractions are often in poor condition, which constrains visitor flows and investor confidence.

Limpopo Province experienced severe flooding during December 2025 and January 2026 following prolonged heavy rainfall, prompting the declaration of a national disaster. The floods caused significant loss of life and widespread damage, affecting over 3,000 households and resulting in at least 27 fatalities as rivers overflowed and communities were cut off from essential services.

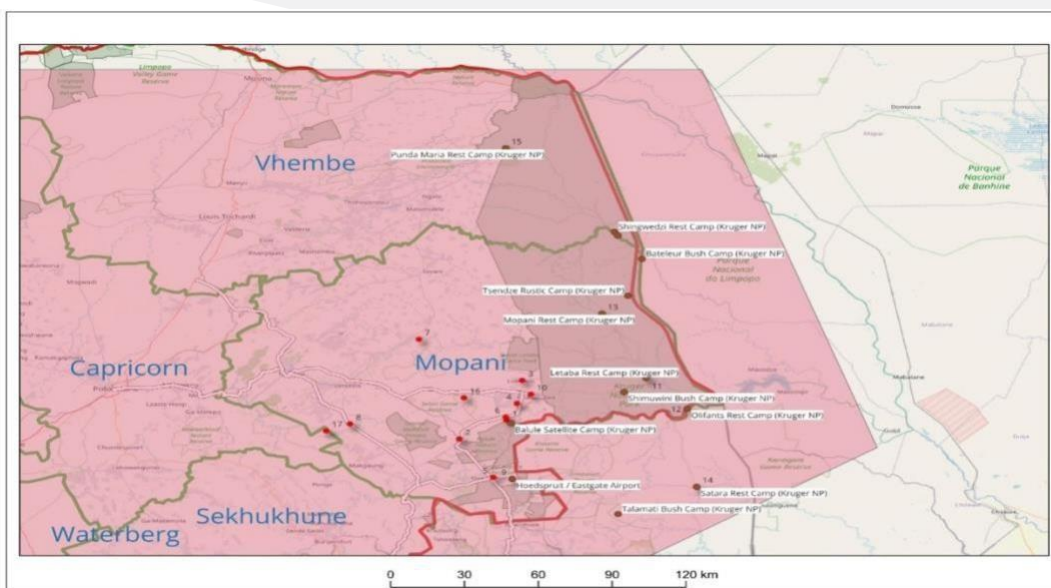
The tourism sector was particularly hard hit, with approximately 439 provincial and municipal roads, covering an estimated 600km, damaged or rendered impassable. Key tourism corridors and access routes such as the R40, R71, R36, and R527 suffered extensive damage, with some bridges failing and important towns like Phalaborwa temporarily isolated, disrupting access to attractions like the Kruger National Park and other key destinations.

Figure 12: The impact of the Limpopo Floods



Internal infrastructure within the Kruger National Park, including roads, bridges, and tourist facilities, was also damaged, leading to temporary closures of park gates and restricted visitor movement. Beyond the park, private lodges and reserves across Limpopo experienced cancellations, reduced occupancy, and operational disruptions due to access constraints and delayed infrastructure repairs, especially in rural and flood-prone areas.

Figure 13: Close up of some of the most significant impact of the floods



Government and SANParks sources do not publish detailed, lodge-by-lodge impact lists for private operators, but reports indicate that access disruption, cancellations, and temporary

operational closures have been widespread among private tourism businesses. The floods have highlighted the vulnerability of Limpopo's tourism sector to extreme weather events and underscored the need for resilient infrastructure and disaster risk management.

The outputs from the consultation sessions emphasized that poor roads, signage and maintenance is perhaps the most critical threat to tourism development in Limpopo province. Airport closures are also limiting access. Furthermore, cross-departmental coordination required is required to deal with the infrastructure constraints of Limpopo.

The stakeholder consultations revealed that Limpopo's tourism infrastructure is highly vulnerable to climate-related shocks (floods, storms, heat), with limited resilience planning and no dedicated funding for recovery. Cross-departmental coordination is required to address infrastructure delivery, climate resilience, and service standards.

There is no permanent, structured Tourism Infrastructure Development and Emergency Support Fund to assist tourism businesses during crises. Recovery mechanisms are ad hoc, slow, and insufficient, particularly for SMMEs. International best practice demonstrates the need for pre-approved, quickly deployable shock-absorption funding mechanisms embedded within governance systems.

Tourism lacks a standardised Disaster Preparedness Framework at business and destination level. Operators have limited access to practical toolkits, risk assessments, and emergency protocols. Communication systems are fragmented, with no centralised tourism emergency communication channel, poor feedback loops, and delayed information dissemination during crises.

Limited digital infrastructure, particularly in rural areas, constrains tourism marketing, safety communication, and business operations. Tourism is not fully aligned with provincial broadband and digitisation programmes. Lack of integrated digital platforms for crisis communication, visitor information, and data management.

Tourism disaster management is currently reactive, ad hoc, and not supported by a structured, pre-approved framework. Lack of defined implementation plans, timelines, responsible parties, and monitoring systems for disaster preparedness and recovery.

5.6.7.3 Infrastructure Gaps Limiting Tourism Growth

The consultation session survey results show that inadequate road infrastructure and poor transport access are the most significant barriers to tourism growth in Limpopo, underscoring the urgent need to improve connectivity between tourism nodes. While many respondents did not specify particular gaps, the responses received consistently point to access-related challenges as the dominant constraint. Secondary issues such as insufficient signage, limited air access, and gaps in basic services like water, sanitation, energy, and digital connectivity also emerged, indicating that broader service readiness remains uneven. Overall, the findings confirm that improving physical access, especially road networks, must be prioritised, supported by enhancements in visitor information systems and essential service infrastructure.

5.6.7.4 Priority Access Challenges to Address by 2030

Stakeholders overwhelmingly identify road access and transport connectivity as the top priority for improving tourism accessibility by 2030, reinforcing the central role of road infrastructure in unlocking tourism potential. Additional access challenges were noted, though these tend to be localised and less consistently articulated. Air access improvements are recognised as important for attracting higher-value markets, while public transport was not currently seen as a major constraint. The high number of non-responses suggests that many stakeholders may not yet have fully developed views on long-term access priorities. Nonetheless, the overall conclusion is clear: strengthening road connectivity should be the primary focus, complemented by targeted improvements in air access and localised access issues.

5.6.7.5 Role of SOEs and Partnerships in Improving Tourism Readiness

The findings indicate broad recognition of the importance of partnerships in enhancing tourism readiness, though many stakeholders lack clarity on how these partnerships should operate. Among the more specific responses, collaboration on road and transport infrastructure stands out as the most critical area, highlighting the key role of agencies such as SANRAL and RAL. Maintenance and upgrades of existing infrastructure also emerge as important, reflecting the need for both new investment and sustained upkeep. Partnerships related to municipal service delivery, institutional coordination, energy, funding, and rail logistics are acknowledged but receive less emphasis. Overall, the results point to the need for clearer partnership frameworks, stronger coordination mechanisms, and a focused approach to infrastructure delivery and maintenance.

5.6.7.6 Digital Enablers Required to Unlock Competitiveness

Stakeholders recognise the importance of digital transformation for tourism competitiveness, though many have not yet articulated specific digital needs. The most prominent requirement is the development of integrated digital platforms and applications that can centralise marketing, information access, and service delivery. Improved connectivity—particularly in rural tourism areas—is also seen as essential, alongside online booking and payment systems that enable SMMEs to participate more effectively in the digital economy. Digital information systems such as e-signage and visitor information tools are also noted, while digital marketing receives comparatively little emphasis. Overall, the findings highlight the need for a coordinated digital ecosystem that integrates platforms, connectivity, and transactional capability to strengthen the province's tourism competitiveness.

5.6.7.7 Human Capital

Human-capital capacity is uneven. While there are pockets of excellence in conservation management and high-end hospitality, many smaller operators struggle with skills gaps in digital marketing, guiding, customer service, financial management, and compliance.

Collaboration with CATHSSETA, TVET colleges, universities, and private training providers is therefore critical to professionalise the workforce.

5.6.8 Strategic implications for the Tourism Growth Strategy include:

- Addressing infrastructure, accommodation and skills constraints through coordinated, climate-responsive planning and investment will be essential to unlock new markets, enhance resilience against seasonality and extreme weather events, and foster deeper local participation in tourism value chains.
- Flood recovery and reconstruction efforts present an opportunity to prioritise climate-resilient design standards, improved maintenance regimes and better integration between tourism planning, disaster risk management and spatial development frameworks.
- Supporting enterprise development, transformation, and market access for emerging tourism businesses.
- Investing in structured skills development programmes across the tourism value chain.
- Using a cluster- and corridor-based lens to integrate disparate supply elements into coherent routes and destinations.
- Leveraging PPP frameworks to upgrade public attractions and develop new tourism nodes in underserved areas.

5.7 Benchmarking and Competition Analysis

Limpopo faces strong competition from both domestic and international destinations offering comparable tourism experiences. Understanding these competitors is essential for positioning Limpopo effectively in the market.

5.7.1 Domestic Competitors

Limpopo is one of South Africa's strongest tourism provinces, particularly in the domestic market, where it consistently ranks among the top destinations for overnight trips. Recent national data indicate that Limpopo has emerged as South Africa's leading domestic tourism province by total trip volumes, driven by strong Visiting Friends and Relatives (VFR) travel, road-trip demand, faith-based travel (notably ZCC pilgrimages), and an expansive network of wildlife and nature-based destinations. Its strategic location as a gateway to Botswana, Zimbabwe and Mozambique further strengthens its position within the SADC self-drive and cross-border market.

In the international tourism market, Limpopo performs strongly within the wildlife and safari segment, anchored by the northern Kruger National Park, private reserves in the Waterberg and Greater Kruger region, and the Mapungubwe Cultural Landscape (a UNESCO World Heritage Site). However, the province remains a mid-tier international destination relative to Gauteng, Western Cape and KwaZulu-Natal, largely due to limited international airlift, a smaller global city footprint, and the absence of coastal products that dominate the national tourism image.

Compared with its competitors, Limpopo holds a clear advantage in nature-based, cultural, cross-border, and pilgrimage tourism, while other provinces outperform it in luxury coastal tourism (Western Cape), large-scale events and beach resorts (KZN), and major urban and business tourism (Gauteng). Mpumalanga remains Limpopo's closest competitor for safari-based tourism, although Limpopo now surpasses it in domestic trip volumes and product diversity.

Overall, Limpopo's tourism competitiveness is strongest in the wildlife, cultural, pilgrimage, adventure, and regional road-travel markets, positioning it as a key pillar in South Africa's domestic tourism economy and a growing force in SADC-focused tourism flows. Strategic action is needed to strengthen international market visibility, improve air access, expand product diversification, and elevate destination branding to match its strong domestic performance.

A summary of the benchmarking analysis is presented in the table below:

Table 5: Domestic Benchmarking

Province	Domestic Tourism Strength	International Tourism Strength	Key Competitive Advantages	Key Areas Where Limpopo Outperforms	Key Areas Where Other Province Outperforms Limpopo
Limpopo	Very strong – among the top provinces for domestic overnight trips	Mid-tier; strong in safari & SADC land markets	Wildlife, culture, pilgrimage, road-trip, cross-border	—	Limited airlift; no coast; small global city
Gauteng	High volumes (VFR + business)	Strongest international arrivals	Business, events, shopping, air access	Safari, rural tourism, cross-border	Global city appeal, international connectivity
Western Cape	Strong domestic leisure	Second strongest international	Coastal, wine, gastronomy, city-break	Safari, faith tourism, SADC markets	Coastal & wine tourism, global brand
KwaZulu-Natal	Strong domestic (coast + culture)	Moderate international	Beaches, Drakensberg, events	Safari, pilgrimage, road-trip	Coastal resorts, major events, brand strength
Mpumalanga	Strong domestic + Kruger	Strong safari; long-haul access via KMI	Panorama Route, Kruger gateways	Domestic volumes, product diversity	Scenic routes, Kruger air access
Eastern Cape	Moderate–strong	Lower international share	Coast, Big 5 (malaria-free), heritage	Safari concentration	Coastal tourism, Garden Route spillover
North West	Moderate	Low international	Sun City, Pilanesberg, bush	Volume, diversity	Icon attractions (Sun City)
Free State	Moderate	Low	Vredefort Dome, Karoo, rural towns	Volumes, wildlife	Heritage towns, central location
Northern Cape	Low–moderate	Niche international	Kgalagadi, Namaqualand, astro-tourism	Overall volume, accessibility	Extreme wilderness, astro-tourism niche

5.7.2 International Competitors

Botswana – Competes directly in the exclusive wildlife safari segment through destinations like the Okavango Delta and Chobe National Park, supported by strong conservation branding.

Kenya & Tanzania – Global safari icons with extensive infrastructure and worldwide recognition. Their dominance in nature and cultural tourism attracts the same market Limpopo seeks.

Zambia & Zimbabwe – Leverage attractions such as Victoria Falls and the Lower Zambezi, drawing adventure and nature enthusiasts from similar target markets.

Mozambique – Provides beach and marine alternatives that attract travellers seeking combined coastal and safari experiences within Southern Africa.

Comparable regional and international destinations that share its product typologies include the Kruger Lowveld, the Northern Cape, Namibia, Botswana, and Zambia. These destinations outperform Limpopo in integrated branding, destination access, and product packaging but are similar in their reliance on nature-based and cultural tourism. Limpopo's competitive advantage lies in its *authentic cultural landscapes*, *transfrontier conservation context*, and *affordability*, yet its competitiveness is constrained by infrastructure, digital visibility, and brand coherence. The benchmarking highlights that high-performing peers integrate conservation, heritage, and community tourism through public-private partnerships, specialised marketing consortia, and incentive-driven investment programmes.



Strategically, Limpopo must therefore:

- Position itself as a **"Conservation and Culture Economy"** integrating mega-parks, heritage routes, and rural enterprise;
- Develop a **provincial destination-management platform** linking cluster marketing, booking systems, and visitor data;
- Benchmark and monitor tourism yield, quality, and satisfaction through shared standards with SANParks and neighbouring SADC authorities; and
- Repurpose benchmarking into a **continuous competitiveness index** aligned to the NTSS (2016-2026) and TSMP (2023).

These lessons emphasise that Limpopo should not imitate metros such as Cape Town or Durban but differentiate through *authenticity, stewardship, and inclusive prosperity*.

5.8 SWOT Analysis

Table 6: SWOT Analysis

Strengths	Weaknesses
• Exceptional Natural and Cultural Assets: Limpopo possesses globally significant biodiversity, protected areas, UNESCO World Heritage Sites, Biosphere Reserves, and Ramsar wetlands, forming a strong foundation for nature and heritage tourism. • Established Tourism Demand: The province is one of South Africa's most visited domestic destinations, with strong SADC regional flows and a recovering self-drive and VFR market. • Cluster-Based Development Framework: The six tourism clusters provide a structured basis for product development, investment attraction, and market segmentation, although refinement is required. • Institutional Framework in Place: Existing governance structures (LEDET, LTA, MEC forums) support coordination and alignment with national strategies. • Potential for Inclusive Growth: Tourism supports rural development, SMMEs, and community participation, with strong potential for expansion in township and rural tourism.	• Infrastructure, Access and Digital Connectivity Constraints: Poor Road conditions, limited air access, weak ICT infrastructure, and border inefficiencies significantly constrain accessibility and destination competitiveness. Limited broadband and digital infrastructure, particularly in rural areas, restrict marketing, business operations, safety communication, and data management. Lack of integrated digital platforms for booking, visitor information, crisis communication, and tourism data systems. Tourism is not fully aligned with provincial digitisation and smart infrastructure programmes. • Weak Governance, Coordination and Implementation Capacity: Previous strategies have been poorly implemented, reflecting weak accountability, limited monitoring and evaluation, and inadequate interdepartmental coordination. Fragmented stakeholder alignment, with limited awareness of the strategy and weak integration between provincial, district, and local plans (including IDPs and SLPs). Limited integration of tourism into broader provincial infrastructure, disaster management, and economic planning systems. Compared to other provinces, Limpopo's LEDET tourism system remains less differentiated, more operationally burdened and relatively under-resourced. • Limited Tourism Product Development and Market Integration: Underdeveloped and fragmented tourism products, with weak linkages between clusters, routes, and destinations. Limited packaging of experiences and underutilisation of heritage, cultural, and community assets. Low international brand visibility, weak digital marketing capability, and lack of integrated booking and distribution platforms. • Low SMME Participation and Inclusive Growth: Insufficient support for SMMEs and community-based tourism enterprises limits local economic participation and inclusive growth. Barriers to market access, funding, and integration into tourism value chains persist. • Market Structure and Seasonality Constraints: Heavy reliance on VFR and domestic peak-season demand results in uneven performance and limited yield optimisation. Limited diversification into high-value international and niche tourism segments. • Service Quality, Safety and Skills Gaps: Inconsistent service standards, skills shortages, and gaps in training and professionalisation affect visitor experience and competitiveness. • Perceptions and realities of safety and security continue to impact destination appeal. • Limited Disaster Preparedness, Climate Resilience and Crisis Management Systems: Tourism infrastructure and destinations are highly vulnerable to climate-related shocks (floods, storms, heat), with limited resilience planning and inadequate alternative access routes. Tourism disaster management is largely reactive and ad hoc, with no standardised, province-wide disaster preparedness framework for tourism businesses or destinations. There is no dedicated Tourism Infrastructure Development and Emergency Support Fund, and recovery mechanisms are slow, fragmented, and insufficient—particularly for SMMEs. Absence of defined implementation plans, roles, timelines, and monitoring systems for disaster preparedness and recovery. Fragmented crisis communication systems, with no centralised tourism emergency communication platform and weak feedback loops between government and industry during crises.

Opportunities	Threats
• Nature-Based and Ecotourism Growth: Biodiversity assets and conservation areas position Limpopo strongly for eco-tourism and sustainable travel markets. • Cultural and Heritage Tourism Development: Significant potential exists to leverage heritage sites, rock art, and living cultures into immersive tourism experiences. • Route Development and Spatial Integration: Integrated tourism routes and circuits are a key opportunity to improve visitor dispersal, strengthen SMMEs, and link clusters. GIS-based planning and route committees are essential. • Infrastructure and Connectivity Investment: Airport expansion, road upgrades, and ICT improvements can significantly enhance access and growth. • Digital Transformation and Smart Tourism: Adoption of digital platforms, GIS, and online systems can improve marketing, booking, and destination management. • Domestic Tourism Growth: Strong potential in family, leisure, and VFR markets to provide a stable demand base. • Business Events and Special Interest Tourism: Opportunities exist in MICE, religious tourism, wellness, astro-tourism, and niche segments, including the establishment of a provincial convention bureau. • Community-Based Tourism and Job Creation: Skills development and enterprise support can expand participation and local economic benefits. • Climate-Resilient and Smart Infrastructure Investment: post-disaster reconstruction and infrastructure investment provide an opportunity to build climate-resilient, digitally enabled tourism infrastructure, including alternative access routes, smart communication systems, and integrated destination management platforms. • Tourism Resilience and Risk Management Systems: Development of a Tourism Infrastructure Development and Emergency Support Fund, combined with a standardised disaster preparedness framework, offers an opportunity to position Limpopo as a resilient, future-ready destination aligned with international best practice. • Destination Branding and Positioning: Limpopo can position itself as an authentic nature–culture destination with a distinctive identity. • Events and Experience Development: A structured events calendar can address seasonality and stimulate demand.	• Infrastructure Failure, Climate Risk and Systemic Disruption: Increasing frequency and intensity of climate-related events (floods, storms, heat) threaten tourism infrastructure, accessibility, and visitor safety. Poor road networks limited alternative access routes, and reliance on single corridors can isolate destinations and disrupt tourism flows. Limited climate-resilient infrastructure and weak integration of climate risk into planning increase long-term vulnerability. • Weak Governance, Delivery and Crisis Management Capacity: Continued gaps in implementation, coordination, and accountability may undermine strategy execution and investor confidence. Tourism disaster management remains largely reactive and ad hoc, with no standardised, province-wide preparedness framework. • Absence of a dedicated Tourism Infrastructure Development and Emergency Support Fund limits rapid response and recovery, particularly for SMMEs. Lack of defined roles, implementation plans, and monitoring systems weakens preparedness and recovery capacity. • Fragmented Communication, Digital Systems and Information Flows: • Absence of a centralised tourism emergency communication system results in delayed, inconsistent, and unreliable information during crises. Weak feedback loops between government, industry, and local stakeholders reduce responsiveness and coordination. Limited broadband and digital infrastructure constrain marketing, operations, safety communication, and data management. Lack of integrated digital platforms for visitor information, crisis communication, and destination management reduces competitiveness in a digital-first tourism environment. • Competitive Market and Economic Volatility: Competing destinations with stronger branding, infrastructure, and digital capabilities may attract key markets and investment. Slow and uneven recovery of international tourism, combined with reliance on domestic and VFR markets, increases vulnerability to economic shocks. Global and regional economic volatility may impact travel demand, spend, and investment flows. • Environmental and Land-Use Pressures: Ongoing tensions between conservation, mining, agriculture, and infrastructure development pose risks to environmental sustainability and destination integrity. Failure to balance economic development with conservation may erode the natural and cultural assets underpinning Limpopo's tourism value proposition

5.8.1 Key Insights and Strategic Imperatives

The SWOT points to seven growth-planning imperatives:

1 Cluster-Based Product Diversification and Market Positioning:

Enhance, consolidate and prioritise the six strategic clusters by integrating niche markets, including ecotourism, adventure tourism, MICE, and cultural heritage, and strengthening their market positioning.

2 Integrated Infrastructure and Climate-Resilient Planning:

Tourism infrastructure planning must extend beyond access improvement to include climate resilience, disaster preparedness, and the development of alternative access routes.

3 Digital Transformation and Smart Tourism Systems:

Expand digital marketing, GIS-based planning, booking platforms, and integrated tourism information systems to improve competitiveness, decision-making, and visitor experience.

4 Capacity Building and Community-Based Tourism Development:

Strengthen skills development, SMME support, and inclusive community-based tourism programmes to expand participation in the tourism economy.

5 Sustainable Tourism, Environmental Management and Climate Risk Mitigation:

Embed sustainability, conservation, and climate risk mitigation into tourism planning, development, and operations.

6 Governance, Coordination and Performance Monitoring:

Strengthen multi-level stakeholder collaboration, enforce regulatory compliance, improve accountability, and align municipal IDPs and sector plans with provincial tourism priorities.

7 Investment Promotion and Market Development (Including a Provincial Convention Bureau):

Enhance investment facilitation, project packaging, and market development, including the establishment of a Provincial Convention Bureau to drive business events and high-value tourism segments.

The most critical strategic shift required is from planning to delivery, supported by:

- Strong governance and accountability mechanisms
- Infrastructure and access improvements
- Integrated route and cluster development
- Digital transformation and brand positioning
- Climate resilience and risk management
- Inclusive, community-based tourism growth.

5.9 STEEPL Analysis

The STEEPL framework highlights multi-dimensional drivers shaping the tourism strategy.

Table 7: STEEPL Analysis

Analysis Factor	Implications
Social	Tourism supports rural livelihoods and cultural pride; however, inequality, unemployment, and limited youth participation threaten inclusivity.
Technological:	Digital marketing, GIS-based planning, and broadband expansion via Limpopo Connexion are enabling factors, yet rural connectivity gaps persist and must be addressed through smart-tourism infrastructure. The Limpopo Province has extensive GIS resources and skills in the Premier's Office. However, the available tourism-related data needs refinement, especially in terms of subcategories, and should be regularly updated. It will be important to develop this capacity either in the LEDET or in the Tourism Authority, which also needs a dedicated tourism research and knowledge management section.
Economic:	Tourism contributes significantly to GDP diversification but faces external headwinds from energy costs, inflation, and constrained household income. Investment incentives and PPPs are vital to maintain growth.
Environmental:	Limpopo's rich biodiversity and extensive conservation areas form the foundation of its nature-based tourism economy, but these assets face mounting threats from over-tourism, land-use conflicts, environmental degradation, and increasing climate-related hazards such as flooding. Recent extreme weather events have intensified challenges like infrastructure damage, soil erosion, and pressures on biodiversity, putting the long-term sustainability of tourism and local communities at risk. To ensure resilience, tourism planning must prioritize environmental sustainability, climate adaptation, integrated spatial management, and proactive disaster-risk mitigation.
Ethical	Tourism practices such as responsible wildlife management, authentic cultural representation, and community-centred development are essential to maintaining the reputation of destinations as responsible tourism destination. Ensuring that tourism development is inclusive, respectful, and socially just must be a foundational principle for the new Growth Strategy.
Political:	South Africa faces higher travel costs, route disruptions and more cautious long-haul demand due to Middle East instability, alongside domestic inflation that suppresses travel spend. Limpopo is particularly exposed through its reliance on Johannesburg gateways and road-based travel, requiring stronger resilience through clustered itineraries, longer stays and more efficient logistics. Stable governance and alignment with the Limpopo Development Plan (2025–2030) underpin tourism as a provincial priority, but inter-jurisdictional coordination (especially in transfrontier parks) remains critical.
Legal/Regulatory:	Compliance with national acts such as the Tourism Act 2014, SPLUMA 2013, and Limpopo Tourism Act 2009 must be streamlined for investor clarity and community empowerment.

Collectively, these elements frame a policy environment that is *enabling but fragmented*, requiring a cohesive Growth Strategy to align economic, spatial, and social objectives.



5.10 Market Opportunities

Limpopo's market opportunities are anchored in its comparative biodiversity, cultural heritage, and spiritual landscapes. Emerging growth segments include:

- Conservation and Regenerative Tourism: Positioning Limpopo as Southern Africa's model for biodiversity-based development; and leverage cultural heritage for sustainable destination management;
- Adventure and Wellness Tourism: Expanding soft-adventure and wellness retreats in mountain and bush settings;
- Cultural Routes and Creative Economy: Packaging Mapungubwe, Makapan Valley, VhaVenda, and BaPedi heritage circuits into cohesive itineraries; and
- Business and Learning Events: Attracting meetings and incentive retreats linked to conservation, agriculture, and heritage themes through a dedicated convention bureau.

Unlocking these opportunities requires **investment packaging**, **skills development**, and **market-specific promotion** within each cluster, supported by accurate demand data and partnerships with SAT, Brand SA, and private consortia.

Table 8: Consolidated Implications of the Strategic Diagnostic, Policy Review and Consultation Findings

Strategic Context	Implications
- Weak implementation of the 2018 Strategy - Limited alignment with district/ municipal planning - Infrastructure and access constraints - Climate shocks affecting tourism - Weak data and intelligence systems	- Shift from planning to delivery; embed accountability, M&E, and implementation protocols. - Integrate TGS into IDPs, SDFs, LED strategies; create joint planning cycles. - Prioritise catalytic infrastructure pipeline; integrate climate-resilient standards. - Embed climate-risk mitigation, disaster preparedness, and resilient design. - Establish a provincial Tourism Intelligence Unit and digital data platform
Legal and Policy Environment	Implications
- International Development Agendas - National and Constitutional Development Mandates - Provincial Development Mandates - Local Development Mandates - Legal and Policy Environment - National and provincial legislation require alignment	- Evidence based planning - Inclusive economic growth - Industrialisation - Infrastructure prioritisation - Tourism Development and Competitiveness - Regional integration - Social and Community development - Spatial planning, Transformation and Integrated Development - Position tourism as a cross-cutting economic driver; secure multi-departmental buy-in. - Strengthen partnerships with SANParks, SADC, and cross-border authorities. - Policy alignment and strategic coherence - Sustainable development and Environmental Stewardship - Partnerships and Stakeholder Collaboration - Economic Transformation and SMME Development - Good governance, accountability and institutional coordination - Financial Management and Resource Efficiency
SWOT Analysis	Implications
Strengths: Biodiversity, culture, clusters Weaknesses: Implementation, infrastructure, coordination Opportunities: Regenerative tourism, faith tourism, wellness, creative economy Threats: Climate risk, environmental degradation, inequality	- Position Limpopo as a Conservation & Culture Economy; - Develop signature routes. - Strengthen governance, M&E, and intergovernmental alignment. - Develop niche-market products and investment packages per cluster - Integrate ESG, climate adaptation, and sustainable land-use controls. - Escalating global geopolitical conflicts and potential supply-chain disruptions, investment uncertainty, and operational risk across key markets. - Rise fuel prices, inflation and slowdown in travel
STEEPL Analysis	Implications
- Social - Technological - Economic - Environmental - Ethical - Political - Legal	- Responsible wildlife management, authentic cultural representation, and community-centred development. - Strengthen cross-border and inter-agency governance mechanisms. - Promote domestic drive-to markets; incentivise PPPs and blended finance. - Prioritise youth skills, rural tourism, and inclusive enterprise development. - Build a Digital Destination Platform; expand broadband and smart- tourism tools. - Mainstream climate resilience, disaster-risk mitigation, and ecosystem protection. - Simplify regulatory processes and strengthen municipal delivery and enforcement capacity
Market Opportunity Analysis Factors	Implications
- Market size - Customer segmentation - Competitive landscape - Market trends - External environment as per STEEPL	- Conservation and Regenerative Tourism - Faith and Pilgrimage Tourism - Adventure and Wellness Tourism - Cultural Routes and Creative Economy - Business and Learning Events:

5.11 Strategic Imperatives

The final diagnostic identifies structural and operational issues that the Growth Strategy must resolve:

- **Access and infrastructure bottlenecks** — poor road quality, limited airlift, and weak public transport undermine competitiveness. In the context of increasing climate variability, recurring flooding and extreme weather events have emerged as a critical cross-cutting risk, directly affecting access routes, tourism infrastructure, protected areas, and community-based enterprises across the province. Addressing infrastructure resilience, including flood-prone road networks, bridges, water systems, energy supply and digital connectivity, is now central to safeguarding tourism competitiveness and business continuity. Strategic priorities must therefore incorporate climate-resilient design standards, disaster-risk mitigation, and rapid recovery mechanisms alongside efforts to improve safety, service quality and visitor confidence.
- **Data and information systems** — limited, inconsistent tourism data impedes decision-making; establishing a provincial tourism research and knowledge management is essential.
- **Human-capital constraints** — skills gaps in guiding, hospitality, and digital marketing weaken service delivery.
- **Fragmented governance** — overlaps between provincial, municipal, and parastatal mandates dilute accountability.
- **Environmental stewardship** — balancing conservation and development remains a core risk requiring strict compliance and climate adaptation.
- **Brand visibility and marketing reach** — weak international perception despite rich assets demands a revitalised storytelling and digital campaign.
- **Rural Tourism** — enhance rural or community tourism by improving entrepreneurial support, improve infrastructure, and insufficient marketing

Priority Actions for Tourism Growth Strategy (2026–2030)

- Integrate tourism into the Limpopo Spatial Development Framework to secure cross sectoral investment;
- Establish a Provincial Tourism Coordination Council to oversee the committees needed to mobilise the clusters chaired by LEDET to align municipalities, agencies, and private stakeholders;
- Implement a Tourism Infrastructure Investment Pipeline with project readiness support;
- Create a Digital Destination Platform (smart-tourism ecosystem) aggregating booking, branding, and analytics; and
- Introduce a Green and Inclusive Tourism Finance Facility to crowd-in sustainable and community projects.
- Integrate Environmental, Social, and Governance (ESG) with explicit incorporation of climate-risk and flood-resilience measures, including sustainable land-use planning, protection of critical ecosystems and river catchments, resilient tourism infrastructure, inclusive community risk-management and livelihood protection, and strengthened governance systems for disaster preparedness, inter-agency coordination, monitoring, and accountability.

5.11.1 Overall Synthesis

Together, the benchmarking, SWOT, STEEPL and opportunity analyses confirm that Limpopo's tourism economy is rich in potential but fragmented in delivery. The 2026–2030 Growth Strategy must therefore shift the Province from a product-driven to a systems-driven destination, integrating environmental stewardship, digital innovation, and inclusive growth. Competitive differentiation should be anchored in Limpopo's inherent strengths: *authenticity, biodiversity, spirituality, culture and heritage, wildlife and conservation*; positioning the Province as a Conservation, Heritage and Culture Economy rather than imitating metropolitan models.

Across all analyses, the consistent message that emerges is that Limpopo's clusters, biodiversity assets, cultural landscapes and spiritual routes offer a strong foundation, but weak implementation, limited coordination, infrastructure constraints, and climate-related shocks undermine performance. Benchmarking highlights the need for a unified destination-management platform, shared standards, and a competitiveness index aligned with national frameworks. The SWOT reinforces the importance of diversifying and strengthening the six clusters, embedding sustainability, improving governance, and expanding community participation. STEEPL insights emphasise the urgency of climate-resilient planning, pro-active disaster management planning and execution, responsible tourism practices, improved rural connectivity, and stronger cross-border and intergovernmental collaboration. The market opportunity analysis further confirms demand for *regenerative tourism, adventure and wellness, cultural experiences, and business and learning events*; opportunities that require targeted investment packaging, skills development, and accurate supply and demand side market intelligence.

- Across these perspectives, several cross-cutting themes converge, namely the need to:
- integrate climate adaptation, disaster and environmental management into all planning;
- modernise the sector through digital platforms, GIS-enabled decision-making, and improved data systems;
- strengthen governance, accountability, and alignment across provincial, district and municipal structures; and
- expand authentic and inclusive community-based tourism that supports rural livelihoods and cultural pride.

Infrastructure development must move beyond access to incorporate resilience, alternative routes, and catalytic investment in priority nodes. Ethical and responsible tourism practices (authentic cultural representation, community benefit, and conservation stewardship) must remain central to Limpopo's identity.

Across all perspectives, it is clear that Limpopo's competitive differentiation and positioning need to be anchored on Limpopo's competitive advantages, namely: *authenticity, biodiversity, spirituality, culture and heritage, wildlife and conservation*.

Overall, the insights from all analyses point to a clear set of strategic imperatives which should form the backbone of a coherent, future-focused Tourism Growth Strategy for Limpopo.

6. Tourism Developmental Cluster Review

6.1 Introduction

A tourism cluster is a sectoral, territorial and voluntary association of business structures that cooperates closely with scientific (educational) institutions, non-governmental organisations and local authorities, with a view to improving the competitiveness of the tourism product and facilitating the economic development of the region.

Limpopo's tourism system is vast and varied — from Kruger's wilderness to Mapungubwe's archaeology and Venda's living culture. To organise such diversity, the province adopted a **cluster-based tourism-development framework**, grouping complementary experiences under six themed clusters:

1. Family & Recreation
2. Safari & Hunting
3. Sport & Wildlife
4. Culture & Heritage
5. Business Events
6. Special Interest Tourism

This model enables spatial balance, integrated product packaging, and coherent marketing. Each cluster functions as an **economic-development corridor** linking conservation, enterprise, and community livelihoods.

6.2 Framework for Applying the Cluster Approach

Applying the cluster model follows a structured process that ensures alignment between tourism assets, market demand, and spatial planning.

Step 1: Resource and Asset Mapping

- Conduct a **comprehensive audit** of tourism resources — natural, cultural, heritage, recreational, and infrastructure assets.
- Use GIS and stakeholder mapping to identify **product concentrations** and **access corridors**.
- Categorise assets by quality, accessibility, and readiness.

Step 2: Market Segmentation and Demand Assessment

- Match each cluster's product mix to target markets (domestic vs. international, high yield vs. volume).
- Analyse visitor behaviour, length of stay, and spending patterns.
- Identify product-market gaps and emerging trends (e.g., wellness, faith, adventure).

Step 3: Cluster Definition and Boundary Setting

- Delineate **geographical zones** or **routes** that naturally group complementary products.
- Define anchor nodes (major attractions) and support nodes (services, communities, logistics).

- Align with municipal SDFs, biodiversity plans, and investment corridors.

Step 4: Value Chain and Enterprise Analysis

- Examine the **tourism value chain: accommodation, guiding, transport, retail, events, and** creative industries.
- Identify leverage points for SMME participation and localisation.
- Map existing and potential partnerships (PPP, concession, or community-owned models).

Step 5: Gap Analysis and Intervention Design

- Prioritise infrastructure, policy, and human-capital gaps.
- Propose catalytic projects—e.g., hub development, route signage, and digital booking systems.
- Integrate sustainability, climate resilience, and transformation criteria.

Step 6: Implementation and Governance Framework

- Establish **Cluster Working Groups**, chaired by LEDET/LTA, with municipal and private participation.
- Define investment pipelines, funding mechanisms, and measurable KPIs.
- Embed monitoring and evaluation (M&E) through quarterly reporting and tourism-data systems.

Step 7: Marketing and Brand Integration

- Develop **cluster-specific sub-brands** under a unified Limpopo identity.
- Package experiences as themed journeys (e.g., "Safari & Soul," "Family & Fun," "Heritage & Hope").
- Use data-driven campaigns and OTAs to reach segmented audiences.

Step 8: Review and Adaptive Management

- Conduct biennial performance reviews for each cluster.
- Adjust boundaries, products, and priorities in response to market shifts and environmental changes.

Outcome:

The process transforms dispersed attractions into **integrated, investable, and self-reinforcing tourism systems**, promoting balanced regional growth and measurable social impact.

The detailed cluster development tables developed for the 2018 review have been updated with on-line data. The Pillars were aligned to correspond with the 2023 Tourism Sector Growth Strategy (TSMP). The three interlinked pillars are to **protect and rejuvenate supply, re-ignite demand, and strengthen enabling capacity for long-term sustainability**. The seven strategic interventions are:

- Enhancing education and skills development;
- Promoting entrepreneurship and economic growth;
- Improving infrastructure and connectivity;

- Fostering social cohesion and well-being;
- Preserving the environment and natural resources;
- Strengthening governance and institutions; and
- Promoting regional cooperation.

The enablers are:

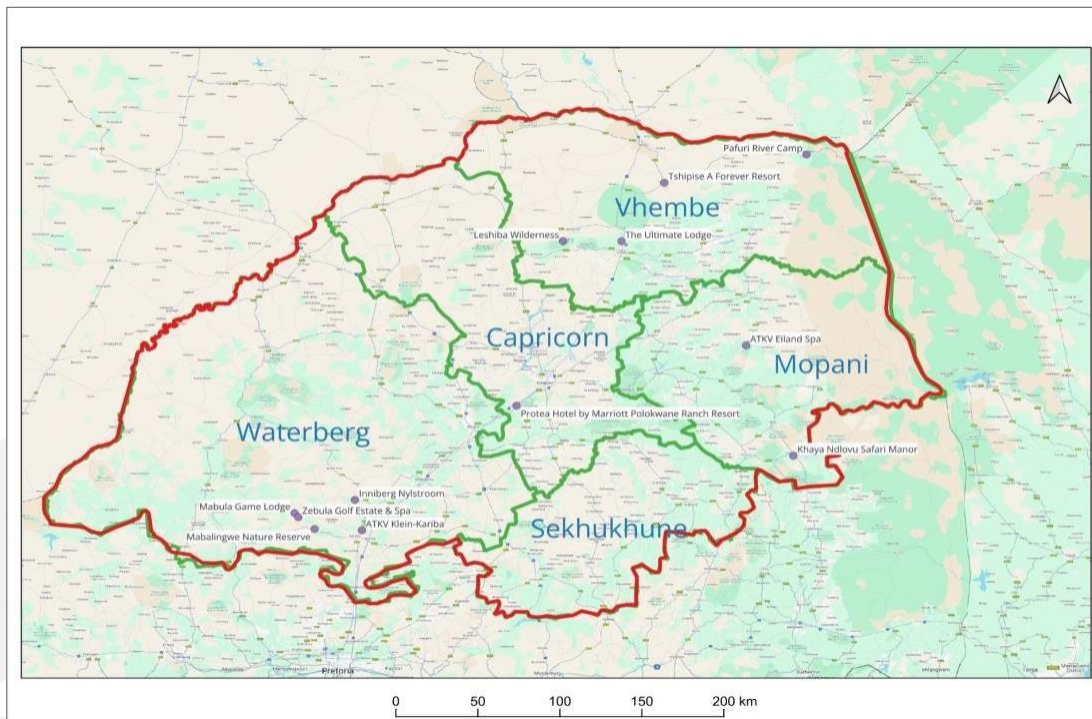
- Targeted, strategic partnerships between government and industry;
- Partnering with relevant government departments to improve travel facilitation: e-visas, tourist safety, increasing airlift capacity, and faster processing of tour-operator licenses; and
- Stimulating domestic demand via government consumption expenditure.

6.3 Cluster Overview

6.3.1 Family & Recreation Cluster

This cluster represents Limpopo's largest share of domestic leisure demand — families, couples, and short-break travellers from Gauteng and neighbouring provinces. Core nodes include Bela-Bela, Modimolle, Tzaneen, and Makhado, anchored by resorts, hot springs, adventure parks, and farm tourism. A simple table outlining some of Limpopo's core family resorts, which can be represented spatially or in GIS format, has been developed. This table could be enhanced by the cluster committee responsible for this cluster. Additionally, the province has an extensive GIS dataset of tourism accommodation, which needs to be sub-categorised by type. The various other accommodation venues that could be used by families and for recreational purposes could then be more comprehensively outlined by this committee.

Figure 14: Family & Recreation Cluster



Strengths

- Strong drive-market proximity from Gauteng (two- to three-hour access).
- Established family resorts with high bed capacity.
- Linkages with lifestyle and retail economies (weddings, golf, and wellness).

Challenges

- Seasonality and weekend concentration; limited weekday demand.
- Ageing resort infrastructure and inconsistent service standards.
- Fragmented marketing — many properties sell individually rather than as a provincial experience.

Strategic Opportunities & Priorities

- Upgrade and reposition resorts as multi-season wellness and recreation destinations.
- Package "family adventure circuits" linking hot springs, wildlife farms, and cultural sites.
- Encourage private reinvestment through infrastructure incentives and targeted marketing.
- Leverage digital booking and social-media campaigns to attract younger families and multi-generational groups.

Expected Outcomes

A revitalised, year-round leisure economy offering value, safety, and authentic local flavour: the foundation for Limpopo's domestic tourism resilience.

6.3.2 Safari & Hunting Cluster

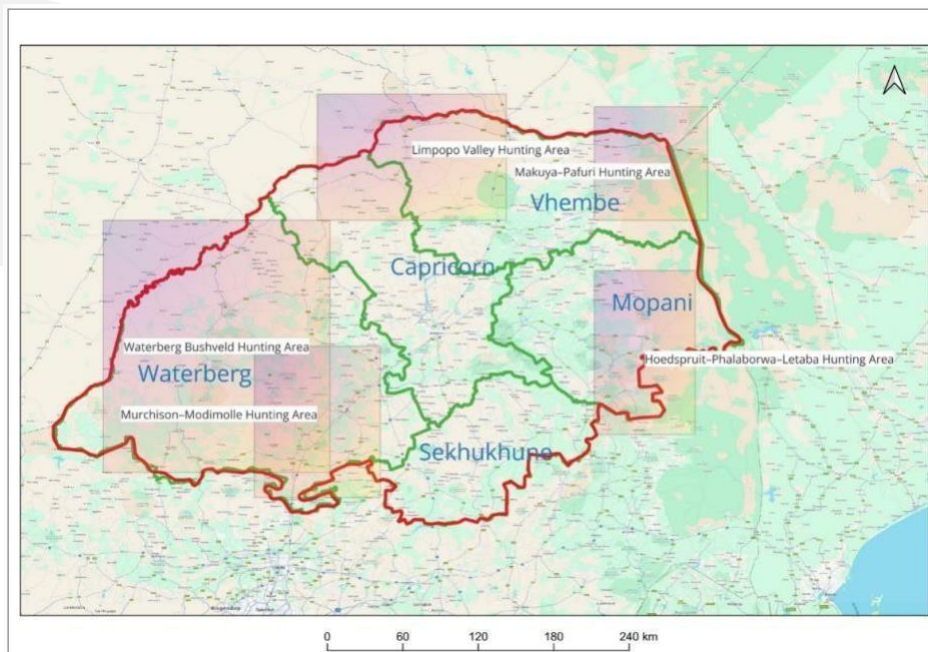
The Safari & Hunting Cluster is Limpopo's flagship for international arrivals and foreign exchange.

Hunting in Limpopo Province is highly regulated and economically significant. While private game farms and concessions dominate, controlled hunting in certain provincial and community reserves is legally sanctioned and contributes to conservation finance and local livelihoods. The province's diverse ecological regions, the Limpopo Valley, Waterberg, Bushveld, and Lowveld, offer extensive opportunities for both domestic and international hunters under the supervision of licensed outfitters and in compliance with environmental legislation.

Reasonable GIS data regarding PHASA operators and provincial and private reserves exists. Input from this cluster is, however, needed to ensure this data is comprehensive and up to date.

The core nodes for hunting in Limpopo are Murchison-Modimolle; Waterberg-Bushveld (Waterberg District Municipality); Limpopo-Valley; Makuye-Pafuri (Vhembe District Municipality); Hoedspruit, Phalaborwa-Letaba (Mopani District Municipality).

Figure 15: Limpopo's Sustainable Wildlife Use Area



Competitive Positioning

Limpopo ranks among the top African destinations for sustainable wildlife and hunting tourism, second only to Namibia and Botswana.

The province's reputation for ethical hunting, conservation breeding, and private-land stewardship underpins its international brand.

Challenges

- Regulatory complexity — permitting, trophy-export processes, and fragmented land management.
- Global pressure regarding ethical wildlife utilisation and sustainability credentials.
- Limited transformation — emerging black-owned operators face barriers to entry.

Strategic Priorities

- Consolidate Limpopo as Southern Africa's Ethical Safari Destination, emphasising conservation impact and community benefit.
- Promote wildlife-ranching linkages with ecotourism, photography, and hospitality to diversify revenue.
- Develop a Wildlife Economy Investment Fund supporting infrastructure and transformation projects.
- Enhance digital traceability and certification systems to ensure international credibility.

Outcome

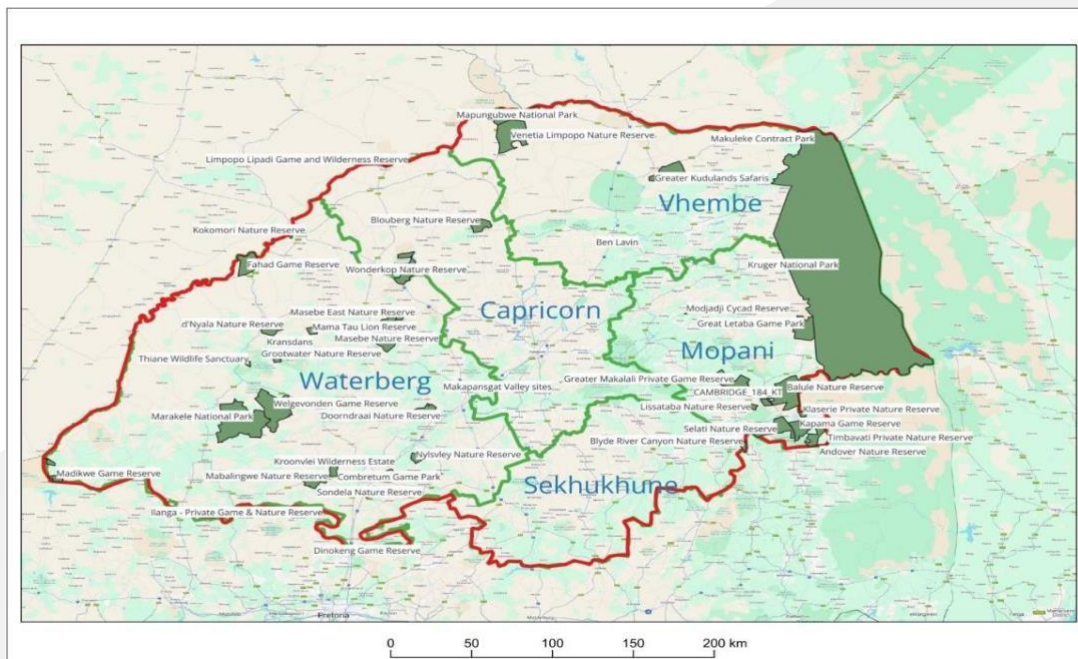
A modern, conservation-led wildlife economy balancing economic returns, biodiversity protection, and inclusive participation; a core pillar of Limpopo's global competitiveness.

6.3.3 Sport & Wildlife Cluster

This cluster bridges active adventure, nature-based sport, and event-driven tourism. It includes hiking, mountain biking, trail running, endurance races, birding competitions, angling, and adventure events across Waterberg, Magoebaskloof, Thohoyandou, and Letaba. Reasonable GIS data regarding national, provincial and private reserves exists. Soccer is particularly popular in Limpopo and could be integrated into such facilities as training camps.

Limpopo's core safari and wildlife nodes are thus the Vhembe, Mopani and Waterberg District Municipalities.

Figure 16: Limpopo's Key Nature Reserves



Current Status

- Hosts signature events such as the Tour de Tuli, Kudu Classic, and regional fishing tournaments.
- Combines scenic landscapes with well-developed lodge and camp infrastructure.
- Attracts high-income repeat visitors and contributes to rural SMME development.

Challenges

- Limited destination coordination; events managed in isolation.
- Inconsistent infrastructure maintenance (trail signage, safety, environmental management).
- Minimal packaging of multi-day adventure circuits.

Strategic Priorities

- Develop an annual Limpopo Adventure Calendar to anchor the province in the national event circuit.
- Partner with adventure-sport federations to certify trails and expand global marketing.
- Promote eco-friendly standards for all sport-tourism activities (low-impact waste and trail ethics)
- Support youth and community participation as guides, marshals, and small-business service providers.

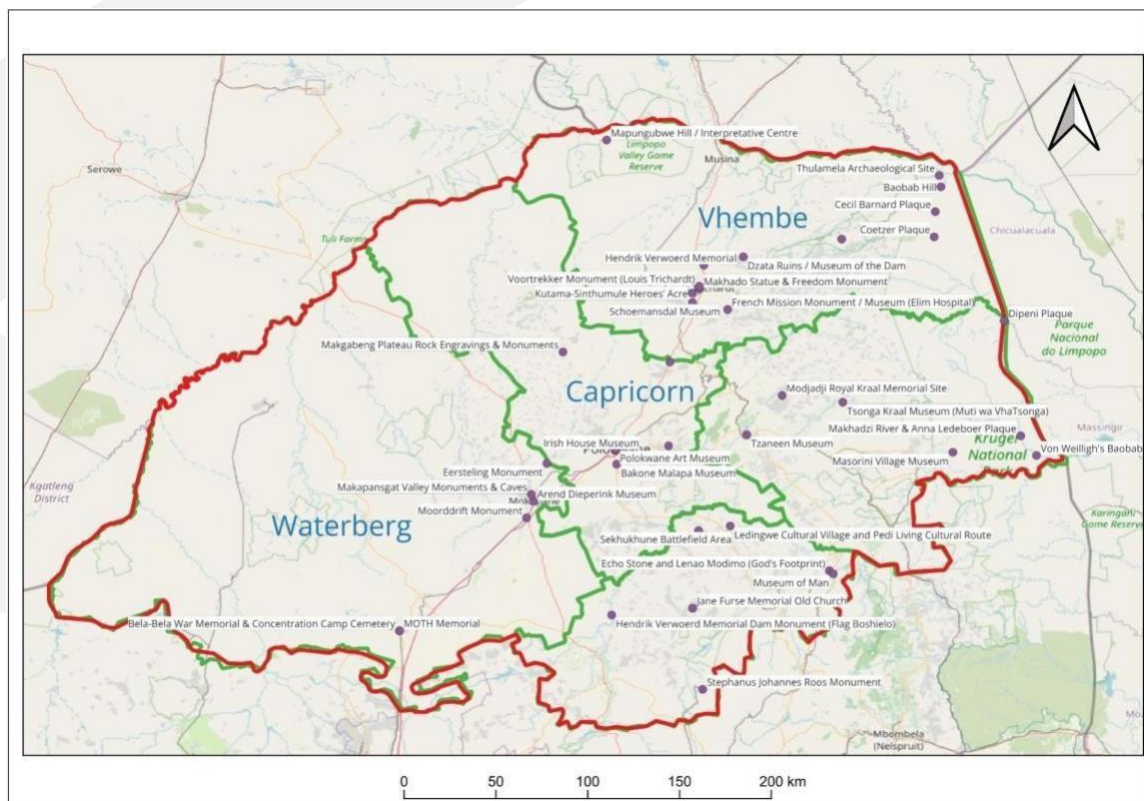
Outcome

A dynamic, sustainable adventure-sport destination that generates repeat visitation, strengthens Limpopo's youthful image, and extends stays beyond wildlife viewing.

6.3.4 Culture & Heritage Cluster

This cluster embodies Limpopo's soul — its living cultures, spiritual heritage, archaeological wonders, and creative expressions. Key assets include the Mapungubwe World Heritage Landscape, Makapan Valley Caves, Limpopo Sacred Landscapes Route, Limpopo Heritage Heartlands Route and Limpopo Living Culture Corridor, traditional craft centres, and sacred sites such as Modjadji's Royal Kraal. Tables have been developed of Limpopo's main museums, monuments, cultural activities and landscapes which can be represented spatially. Additionally, the Premier's planning division has an extensive GIS dataset of cultural and historical assets that needs to be sub-categorised.

Figure 17: Some of Limpopo's Museums, Monuments & Historical Sites



The Core districts for cultural and heritage tourism the Limpopo province based on the concentration of cultural and heritage assets are the Vhembe, Capricorn (Polokwane) and Mopani district municipalities.

Strengths

- Global significance of Mapungubwe and Makapan Valley as early civilisation centres.
- Rich intangible heritage — music, dance, oral history, and crafts.
- Strong potential for cultural tourism, film, and creative industries.

Challenges

- Limited interpretation facilities and poor visitor flow at heritage sites.

- Need for community custodianship, conservation training, and storytelling skills.
- Weak integration between cultural and mainstream tourism marketing.
- Lack of adequate legislation that promotes the protection of indigenous resources and knowledge

Strategic Priorities

- Develop Heritage Interpretation Centres and guided storytelling programmes in partnership with traditional authorities.
- Integrate Mapungubwe-Makapan Route with national heritage circuits (Freedom Route, Cradle of Humankind).
- Expand living-culture tourism — craft trails, festivals, gastronomy, and homestay experiences.
- Create a Creative Industries Fund to support performing arts and cultural entrepreneurs.

The Creative Economy

Limpopo's strategy integrates the creative industry with tourism by leveraging the province's cultural heritage, arts, and crafts to generate distinctive visitor experiences that stimulate economic growth and employment. The creative sector cluster, encompassing music, theatre, dance, publishing, poetry, craft, and film, should be developed and promoted as a central element of all tourism routes and growth initiatives. The creative sector is positioned to serve as the foundation for the province's cluster-based tourism development model.

This approach builds upon heritage tourism, storytelling, and content creation. Developing creative infrastructure, including studios and theatres, and supporting local artisans enables the province to position the creative sector as a competitive tourism asset and integrate it as a strategic tourism cluster.

Key Components of the Tourism and Creative Industries Integration Strategy

- **Cultural and Creative Tourism Promotion:** Integrate traditional arts, crafts, and heritage, particularly in rural areas, to provide authentic cultural experiences.
- **Infrastructure Support:** Develop specialized creative infrastructure, such as theatres and studios, to support local artists and content creators.
- **Strategic Partnerships:** The Limpopo Tourism Agency (LTA) should collaborate with relevant government departments and the private sector to upgrade facilities and enhance marketing efforts.
- **Economic Empowerment:** Encourage small, medium, and micro enterprises (SMMEs) and local artisans to participate in the creative value chain across film, music, fashion, theatre, digital content creation, entertainment, and related sub-sectors.
- **Targeting Growth:** Stimulate provincial economic growth by prioritizing the creative industry and strengthening the sector to attract additional visitors and generate employment through concerts, theatre, fashion, gastronomy, and related activities.
- **Marketing Focus:** Implement targeted marketing campaigns to showcase Limpopo's creative sectors to domestic and diaspora travellers, thereby increasing awareness and supporting the local economy.

By developing these components, Limpopo can transform its cultural, social, and environmental resources into sustainable, income-generating tourism opportunities.

Limpopo hosts several major annual arts and culture initiatives that celebrate local heritage, music, and performance. These events foster social cohesion and support the local tourism and creative economy. Clustering, positioning, and marketing these initiatives as distinctive tourism assets will strengthen the integration between the two sectors. Key events include the Mapungubwe Arts Festival, the Limpopo Arts and Culture Awards (LACA), the Marula Festival (Ku Luma Vukanyi), the Annual National Oral History Conference, and the Galowe Cultural Festival, a competition focused on a cappella performances that aims to revive traditional cultural dance and music.

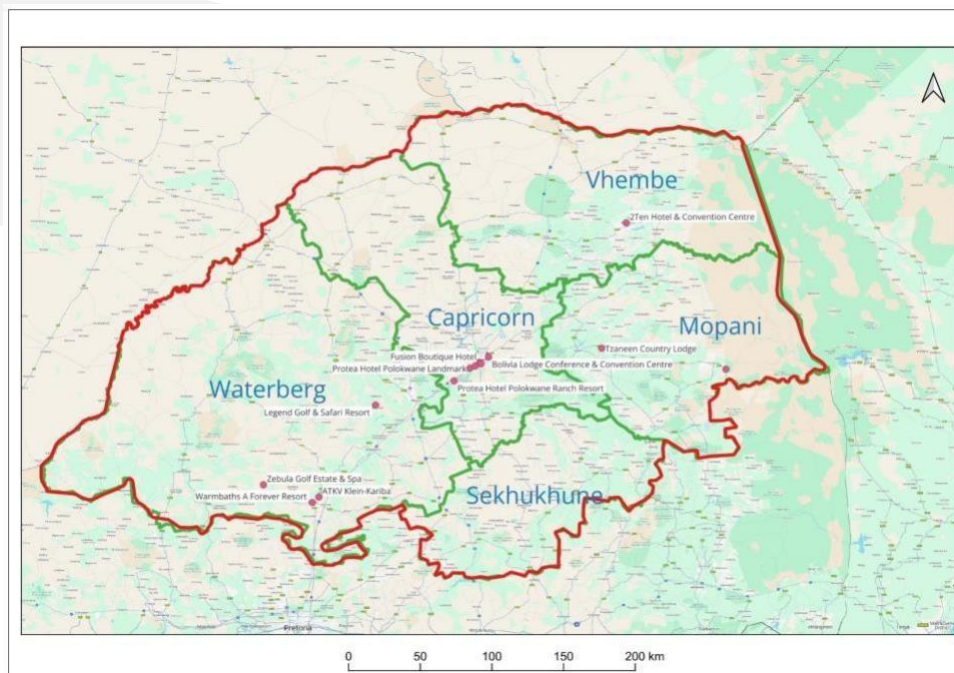
Outcome

A vibrant, inclusive cultural-heritage economy showcasing Limpopo as "the cradle of southern African civilisation", generating pride, jobs, and preservation of heritage.

6.3.5 Business Events Cluster

This cluster focuses on meetings, incentives, conferences, and exhibitions (**MICE**), anchored in Polokwane, Bela-Bela, Tzaneen, and emerging nature-based executive venues. Polokwane is the core node. It is a high-value, low-volume segment with strong links to other clusters (safari, faith, and recreation). This cluster will require a dedicated strategy and institutional arrangement such as a dedicated Convention Bureau.

Figure 18: Some of Limpopo's conference venues



Opportunities

- Rising demand for out-of-city, nature-immersive conference experiences.
- Growth of government, corporate, and professional-association meetings in secondary cities.
- Incentive travel combining business with wellness, golf, or conservation experiences.

Challenges

- Limited large-scale venue capacity; fragmented service standards.
- Inconsistent marketing within national MICE platforms.

Strategic Priorities

- Develop an aggressive business events strategy for the Limpopo Province;
- Establish a Limpopo Convention Bureau and Partnership Platform coordinated by LEDET and LTA.
- Upgrade Polokwane's conference infrastructure and promote niche executive venues in Waterberg and Magoebaskloof.
- Develop capacity-building and accreditation programmes for MICE professionals.
- Package "Business + Leisure" itineraries linking conferences with wildlife, culture, and golf.

Outcome

A distinctive **meetings-and-incentive** destination where business productivity meets natural inspiration; anchoring year-round, high-yield tourism.

6.3.6 Special Interest Cluster

This diverse cluster consolidates high-niche markets that drive yield, specialisation, and diversification. It comprises six sub-segments: Birding Tourism, Fresh-Water Angling, Adventure Tourism, Medical Tourism, Religious Tourism, Gastronomy tourism and Golf & Game Tourism.

6.3.6.1 Birding Tourism

Limpopo's biodiversity (over 600 recorded species) and unique biomes make it a top African birding destination. The strategy is to formalise routes Soutpansberg-Limpopo, Capricorn- Letaba, Waterberg-Nylsvlei, and Kruger to Canyon with certified guides, hides, and digital field apps.

6.3.6.2 Fresh-Water Angling

Dams such as Doorndraai host popular competitions. Infrastructure improvements and harmonised regulations can elevate Limpopo to the status of the "Inland Fishing Capital of South Africa." A GIS Dataset of Limpopo's core angling venues has been developed, that can be represented spatially is in the main report. This can be further enhanced by a committee responsible for this segment.

6.3.6.3 Medical Tourism

Centred in Polokwane and Bela-Bela, combining healthcare, rehabilitation, and wellness travel. Partnerships with private hospitals and insurance providers can position Limpopo for regional SADC wellness-care travel.

6.3.6.4 Religious Tourism

Large-scale pilgrimages and faith gatherings (ZCC Moria, St Engenas and Manche Masemola) are key economic drivers. Priorities include crowd management, infrastructure investment, and formal tourism packaging around major events.

6.3.6.5 Golf & Game Tourism

High-end golf estates (e.g., Entabeni, Elements, Hans Merensky) offer strong potential for sport-leisure integration. Marketing should target corporate incentives, international golf-safari circuits, and domestic weekenders. A table of Limpopo's golf courses is in the main report and can be represented spatially.

6.3.6.6 Astro-tourism

Astro-tourism represents a high-potential niche within the Special Interest Tourism cluster, focused on the observation and interpretation of the night sky, astronomical phenomena, and associated cultural narratives. The National Astro-Tourism Strategy (2023–2034) identifies this segment as a strategic opportunity to diversify South Africa's tourism offering, particularly in rural and nature-based destinations. By leveraging unpolluted night skies, scientific infrastructure, and indigenous knowledge systems, astro-tourism can contribute to economic growth, job creation, and enhanced visitor experiences, while supporting environmental sustainability and cultural preservation.

For Limpopo, astro-tourism aligns strongly with existing provincial assets, including extensive rural landscapes, biosphere reserves, low light pollution areas, and rich cultural heritage. The integration of indigenous celestial narratives (star lore) with nature-based and heritage tourism provides a distinctive and authentic visitor experience. The development of astro-tourism also supports broader policy objectives, including rural development, inclusive economic participation, and skills development, particularly through community-based tourism enterprises and guide training initiatives.

The successful development of astro-tourism in Limpopo will require a coordinated, route-based approach supported by targeted infrastructure investment, skills development, and strategic partnerships. Key opportunities include the development of dark sky sites, astro-tourism routes, and flagship projects, as well as the positioning of Limpopo as an emerging “dark sky destination.” By integrating astro-tourism into the Limpopo Tourism Growth Strategy, the province can strengthen its competitiveness within the special interest tourism market while driving inclusive and sustainable growth.

6.3.6.7 Agritourism

Agritourism offers immersive farm-based experiences that showcase rural life, agricultural practices, and community livelihoods.

6.3.6.8 Gastronomy Tourism

Gastronomy tourism explores a destination through its food culture, traditions, and culinary experiences, deepening cultural connection through taste.

6.3.6.9 Geotourism

Geotourism highlights a destination's geological features, landscapes, and natural heritage, offering travellers meaningful encounters with Earth's history while supporting conservation and education.

6.3 Strategic Implications

Together, these sub-clusters embody specialisation and diversification; vital to sustaining year-round demand and attracting new private investment. A summary of the implications for the tourism growth strategy is presented in the table below:

Table 9: Cluster Strategic Implications

Insight	Implications
<i>1. Limpopo's Tourism System Functions as an Integrated, Cluster-Based Growth Engine</i> The province's tourism economy is best advanced through a clustered, spatially balanced system that links conservation, enterprise development, and community livelihoods.	Continue strengthening cluster governance, route-based development, and cross-cluster synergies to drive inclusive growth, investment readiness, and regional competitiveness.
<i>2. Alignment with National Growth Pillars Requires a Shift Toward Sustainability, Demand Re-Ignition, and Enabling Capacity</i> The review integrates the TSMP's three pillars: protect and rejuvenate supply; re-ignite demand; strengthen enabling capacity, and seven strategic interventions. It highlights the need to align with South Africa's 2023 Tourism Sector Growth Strategy.	Cluster strategies must explicitly embed: Sustainability and climate resilience, Skills development and transformation, Infrastructure and connectivity improvements, and Governance strengthening and regional cooperation. This will assist in positioning the province to compete in sustainability-led tourism economy.
<i>3. Strong Core Assets, but Infrastructure, Standards, and Coordination Gaps Persist Across Clusters</i> Across all clusters, the review identifies recurring constraints: ageing infrastructure, fragmented marketing inconsistent service standards, and limited packaging. For example, the Family & Recreation cluster notes "ageing resort infrastructure and inconsistent service standards	Ensure a province-wide Quality and Standards Improvement Programme, coupled with targeted reinvestment incentives, is essential to modernise products, enhance visitor experience, and unlock higher yield market segments.
<i>4. High-Potential Growth Segments Require Structured Development and Market Positioning</i> The review highlights multiple high-growth niches: adventure, birding, gastronomy, medical tourism, religious tourism, and astro-tourism.	Prioritise niche-market development frameworks, including certification, route creation, skills training, and investment packaging, to diversify the provincial tourism economy and increase resilience.
<i>5. The Wildlife Economy Remains a Global Competitiveness Anchor, but Requires Modernisation and Transformation</i> The Safari & Hunting cluster is positioned as Limpopo's "flagship for international arrivals and foreign exchange". Yet challenges include regulatory complexity, global ethical scrutiny, and limited transformation.	A modernised, conservation-led wildlife economy, with digital traceability, community benefit models, and a Wildlife Economy Investment Fund, is essential to sustain global credibility and unlock inclusive growth.
<i>6. Culture & Heritage is Underdeveloped Relative to Its Global Significance</i> The review emphasises the global importance of Mapungubwe and Makapan Valley, noting "global significance of Mapungubwe and Makapan Valley as early civilisation centres". However, interpretation, custodianship, and marketing remain weak.	Limpopo must elevate culture and heritage as a signature provincial differentiator, investing in interpretation centres, storytelling, creative industries, and legislative protection of indigenous knowledge.
<i>7. MICE Offers High-Yield Potential but Requires Institutional Strengthening</i> The Business Events cluster highlights the need to "establish a Limpopo Convention Bureau" to coordinate marketing, standards, and investment.	A dedicated Convention Bureau and partnership platform is critical to position Limpopo as a nature-immersive MICE destination and to stimulate year-round demand.
<i>8. Data, GIS, and Digital Systems Are Foundational Enablers</i> Across clusters, the review repeatedly calls for improved GIS datasets, digital booking systems, and data-driven marketing. For example, the Family & Recreation cluster notes "the province has an extensive GIS dataset which needs to be sub-categorised".	Limpopo must invest in tourism intelligence systems, digital platforms, and GIS-based planning to support evidence-led decision-making and investment promotion



6.5 Limpopo Tourism Cluster Quantification

Limpopo's tourism economy is underpinned by approximately **6.94 million annual trips**, comprising **6.3 million domestic trips and 640,000 international arrivals**. These visitors engage across six core tourism clusters that collectively define the province's tourism offering. It is important to emphasise that these clusters represent **experience categories rather than distinct visitor segments**, and therefore should not be aggregated to represent total visitor volumes.

The inclusion of an estimated **1.5 million Easter pilgrimage movements** significantly influences the **Special Interest cluster**, although these are primarily low-spend, event-driven trips and are incorporated within the broader domestic tourism system rather than treated as additional unique arrivals.

Within this structure:

- **Family & Recreation** remains the primary driver of domestic tourism, accounting for the largest share of trip volumes.
- **Safari & Wildlife** (including hunting) continues to underpin Limpopo's international tourism performance, supported by the Kruger National Park and a well-established network of private reserves.
- **Cultural & Heritage** and **Sport & Adventure** contribute to product diversification and support spatial distribution of tourism benefits.
- **Special Interest** encompasses both niche experiential tourism and large-scale pilgrimage movements.
- **Business & Events (MICE)** plays a strategic role in urban centres, particularly in sustaining occupancy and midweek demand.

Cluster Participation Profile (Experience-Based)

Note: The figures below represent **participation across clusters** and not unique visitor totals. Individual visitors may engage in multiple clusters during a single trip.

Table 10: Cluster Participation

Cluster	International Visitors	Domestic Visitors	Total Participation
Family & Recreation	150,000	3,250,000	3,400,000
Safari & Wildlife	514,000	1,350,000	1,864,000
Cultural & Heritage	115,000	550,000	665,000
Sport & Adventure	10,000	600,000	610,000
Special Interest (incl. pilgrimage)	182,700	1,700,000	1,882,700
Business & Events (MICE)	6,000	224,000	230,000

Approach to Economic Value Attribution

Each tourism cluster attracts visitors with distinct behavioural patterns and expenditure profiles. To estimate the economic contribution of each cluster, a structured attribution model was applied, incorporating:

- Cluster participation volumes
- Typical spend per visitor by cluster type
- Relative value intensity across clusters
- **Alignment with the verified provincial tourism baseline of R22.6 billion**

Because visitors often participate in multiple experiences during a single trip, the model applies **proportional attribution**, ensuring that the aggregate value across clusters aligns with the total tourism economy and avoids double counting. This approach reflects standard practice in tourism economic modelling and provides a defensible basis for cluster-level analysis.

Basis for Average Spend per Visitor

Average spend estimates were derived using six primary determinants of tourism expenditure:

- Length of stay
- Accommodation typology
- Activity cost and intensity
- Transport usage
- Food and beverage consumption
- Entry fees, permits and event-related costs

These variables reflect observed travel behaviour patterns across both domestic and international markets.

Most-Probable Spend per Visitor (Per Trip)

Table 11: Probable expenditure

Cluster	Visitor Profile	Avg Spend (R)
Safari & Wildlife	Multi-night stays, guided wildlife experiences	9,000
Family & Recreation	Domestic leisure travel, resorts, camping	4,500
Cultural & Heritage	Short cultural visits and guided experiences	4,500
Sport & Adventure	Outdoor recreation (fishing, hiking, MTB)	3,000
Special Interest – General	Niche tourism (birding, geology, astro-tourism)	3,500
Special Interest – Pilgrimage	Day or low-cost event-based travel	1,500
Business & Events (MICE)	Accommodation, venues, catering and conferencing	15,000

Given the composition of the Special Interest cluster—combining approximately **1.5 million low-spend pilgrimage visitors** with smaller volumes of higher-spend niche travellers—a **blended average spend of R2,500 per visitor** is applied. This is considered a realistic and conservative estimate within the provincial context.

Estimated Tourism Value by Cluster (Aligned to R22.6 Billion)

Table 4: Cluster Value

Cluster	Estimated Value (R billion)	Share of Total
Safari & Wildlife	8.41	37.2%
Family & Recreation	7.67	34.0%
Special Interest (incl. pilgrimage)	2.36	10.4%
Business & Events (MICE)	1.73	7.7%
Cultural & Heritage	1.50	6.6%
Sport & Adventure	0.92	4.1%
Total	22.60	100%

This distribution highlights the significant contribution of **high-value, lower-volume segments**, particularly Safari & Wildlife and Business Events, alongside the stabilising role of high-volume domestic tourism.

Clusters with the Highest Growth Potential

Stakeholders identified Family and Recreation, followed by Nature and Wildlife, as the clusters with the strongest growth potential, signaling a clear preference for strengthening broad-based, accessible tourism experiences that appeal to domestic and regional markets. Adventure and Sport, along with Culture and Heritage, were also recognised as meaningful opportunities, suggesting room to diversify into more specialised, experience-driven products. The limited emphasis on MICE and Business Events indicates that this segment is not yet widely viewed as a major growth driver, despite its economic potential. The high number of non-responses points to limited familiarity with cluster-based development, underscoring the need for clearer communication and alignment. Overall, the consultations reveal a strong appetite for consolidating core leisure tourism while selectively expanding into niche experiential offerings.

Constrained Clusters and Priority Fixes

Stakeholders highlighted that all clusters face constraints, with Culture and Heritage, Nature and Wildlife, and MICE emerging as the most affected, indicating that both traditional and niche segments are hindered by systemic challenges. Adventure and Sport, as well as Family and Recreation, also experience constraints, reinforcing that limitations are not isolated but cut across the entire tourism landscape. Infrastructure improvements were identified as the most urgent intervention, echoing the broader diagnostic that access and basic services remain the most significant barriers to growth. Marketing, promotion, and skills development were also noted as important enablers, while funding and governance issues, though less frequently mentioned, remain relevant. The overall conclusion is that cluster constraints stem largely from cross-cutting issues, requiring systemic, province-wide interventions rather than isolated, cluster-specific fixes.

Strengthening Linkages Between Tourism Clusters

Stakeholders acknowledged the importance of strengthening linkages between clusters, though many struggled to articulate specific mechanisms, as reflected in the high proportion of non-responses and general comments. Among the more concrete proposals, partnerships and stakeholder coordination, along with route development and integration, were seen as the most effective ways to create a more connected and cohesive tourism system. Shared marketing and branding also emerged as a key opportunity, highlighting the need for a unified destination identity that spans multiple clusters. Additional enablers such as joint training, coordinated events, and digital information platforms were recognised as supportive but secondary. Overall,

the consultations point to the need for stronger collaboration, integrated spatial planning, and aligned marketing to unlock synergies across clusters and enhance the overall visitor experience.

Priority Niche Tourism Opportunities

Stakeholders identified several promising niche opportunities that could diversify Limpopo's tourism offering, with gastronomy and culinary tourism emerging as the most prominent, followed by faith tourism and the creative economy. These preferences reflect a growing interest in culturally rooted, experience-based travel that can differentiate the province in a competitive market. Wellness and eco-tourism also featured strongly, aligning with global trends toward sustainability and personal wellbeing. Heritage and adventure niches received less emphasis, likely because they are already embedded within mainstream tourism products. The presence of unspecified niche ideas suggests additional localised opportunities that require further exploration. Overall, the findings highlight the potential to broaden the tourism portfolio through targeted niche development, particularly in food, faith, and creative experiences, supported by deliberate product development and strategic marketing.

Strategic Implications

Safari & Hunting – Limpopo's largest value generator

- Highest yield cluster
- Requires investment in conservation, access roads, anti-poaching, and protected area management
- Strategic asset for international marketing

Family & Recreation – Foundation of domestic tourism

- Drives mass visitation and SMME jobs
- Requires improved public amenities, safety, and visitor services

Special Interest (incl. pilgrimage) – Major surge driver

- Over 1.5 million pilgrimage visitors create seasonal demand
- Requires infrastructure for peak flows: roads, sanitation, emergency services
- Opportunity for structured faith-based tourism

Business & Events (MICE) – Highest spend per visitor

- Supports weekday occupancy and urban development
- Justifies investment in conference centres and quality hotels

Cultural & Heritage – Identity and legacy

- Supports rural development and cultural preservation
- Requires improved access, interpretation, and product packaging

Sport & Wildlife – Niche growth

- Strong potential in events (MTB, trail runs, fishing competitions)
- Appeals to youth and adventure markets

6.6 Crosscutting Roles and Responsibilities in Cluster Delivery

Effective cluster delivery depends on coordinated governance:

Provincial Leadership and Strategic Oversight

LEDET provides strategic direction for Limpopo's tourism sector, ensuring policy alignment and enabling a supportive investment environment. Its leadership coordinates growth initiatives across stakeholders to attract high-impact domestic and international investment.

Marketing, Branding, and Visitor Services

LTA drives Limpopo's destination marketing, brand positioning, and visitor information services. Through targeted campaigns and partnerships, it strengthens the provincial brand and boosts visitor numbers and product competitiveness.

Spatial Planning, Infrastructure, and Land-Use Management

District and Local Municipalities enable tourism development through spatial planning, infrastructure provision, and land-use approvals. Their decisions shape tourism nodes, routes, and precincts, directly influencing investment viability and visitor experience.

Product Development, Service Delivery, and Community Participation

The private sector and communities anchor Limpopo's tourism offering through product ownership, service excellence, and cultural authenticity. Strengthening skills, enterprise support, and community-based models ensures inclusive, sustainable sector growth.

Financing Catalytic Projects and Partnerships

DFIs unlock capital for catalytic tourism projects, enabling large-scale infrastructure and public-private partnerships. Their alignment with provincial priorities accelerates investment, diversifies products, and enhances competitiveness.

Provincial Tourism Coordination Council

A Provincial Tourism Coordination Council is recommended to integrate planning, monitor progress, and coordinate implementation across all clusters. By uniting LEDET, LTA, municipalities, DFIs, private sector, and communities, it ensures coherence, accountability, and streamlined decision-making.

The consultation sessions emphasised that the clusters and cluster approach are relevant for the Limpopo Province. However, they need reconfiguration. Key growth areas are adventure, wellness, culture, business events, and gastronomy. There is a need to upgrade resorts and improve the online presence of the clusters.

6.6 Recommended Tourism Cluster Framework (2026–2030)

The cluster review process marks a deliberate shift *from* traditional, supply-driven tourism categories, such as safari, culture, sport and business events, *towards* a more modern, experience-led and market-facing approach. Instead of organising products around what the sector currently supplies, the new framework groups offerings according to traveller motivations and the types of experiences they actively seek. This transition enables the development of activity-based, demand-aligned clusters that are easier to package, promote and scale, ultimately positioning Limpopo's tourism economy to respond more effectively to evolving market trends and visitor expectations.

Table 53: Recommended Cluster Framework 2026 - 2030

Cluster	Description	Rationale for Inclusion and Consolidation
1. Family Recreation & Sport	This cluster includes resorts, holiday estates, self-catering accommodation, wellness facilities, and family-oriented attractions, particularly those serving the domestic and regional self-drive market. It focuses on accessible, affordable leisure experiences.	Domestic tourism is the primary volume driver for Limpopo, particularly from Gauteng and neighbouring provinces. The consolidation and repositioning of "Family & Recreation" into a clearly defined leisure cluster aligns with strong self-drive, VFR, and short-break travel trends. This cluster plays a critical role in stabilising demand, reducing seasonality, and supporting SMME participation, while providing opportunities for product upgrading and improved visitor experiences.
2. Sustainable Wildlife Use	This cluster encompasses the sustainable use, management and conservation of wildlife resources, including game ranching, hunting, breeding, biodiversity-based enterprises, and conservation-linked tourism activities. It recognises wildlife as both an ecological and economic asset.	The wildlife economy is a significant land-use and investment driver in Limpopo, particularly on private land. Separating this cluster from mainstream tourism allows for targeted policy, investment, and transformation interventions, while aligning with national biodiversity economy priorities. Reframing the cluster around conservation and sustainable use improves international positioning and ensures alignment with environmental, social and governance (ESG) principles, while retaining the economic contribution of the sector.
3. Nature, Safari & Adventure	This cluster focuses on Limpopo's core nature-based tourism assets, including protected areas, private reserves, biosphere regions, and outdoor adventure activities such as hiking, trails, birding, mountain biking, and photographic safaris. It integrates wildlife viewing with active outdoor experiences.	Limpopo's strongest competitive advantage lies in its natural assets, including national parks, biospheres, and private reserves. Global demand for nature-based, outdoor and wellness-oriented experiences is increasing, making this a primary growth driver. The consolidation of "Safari & Wildlife" and "Sport & Wildlife" addresses fragmentation and aligns the cluster with experience-based travel trends, improving packaging, route development, and investment focus.
4. Culture & Heritage	This cluster focuses on Limpopo's cultural, historical, and archaeological assets, including heritage sites, living cultural experiences, rock art, traditional villages, and community-based tourism. It emphasises authentic, place-based storytelling and local participation.	There is growing demand for immersive, authentic, and culturally meaningful experiences. Limpopo's rich heritage, including World Heritage Sites and living cultural landscapes, is underutilised and poorly packaged. Strengthening this cluster supports inclusive growth, community participation, and rural tourism development. It also enhances destination differentiation and supports the development of integrated routes and experiential products.

Cluster	Description	Rationale for Inclusion and Consolidation
5. Business Events/ MICE	This cluster focuses on meetings, incentives, conferences, exhibitions, and corporate and government events, including retreats and small to medium-sized convenings linked to Limpopo's natural and cultural assets.	Business events represent a high-value tourism segment that can increase visitor spend, reduce seasonality, and support infrastructure investment. The consultation sessions identified lifestyle events and business events as underdeveloped opportunities. Strengthening this cluster, including the potential establishment of a Limpopo Convention Bureau, will improve coordination, marketing, and investment in venues and services, while leveraging Limpopo's unique positioning for experiential business events.
6. Special Interest Experiences & Lifestyle Events	This cluster includes emerging and niche tourism segments such as religious tourism, wellness and retreat tourism, astro-tourism, gastronomy, festivals, creative industries, and educational tourism. It focuses on targeted, experience-driven markets.	The existing "Special Interest" cluster lacked clarity and strategic focus. Consolidating niche markets with events creates a more coherent, market-driven cluster that supports innovation and product diversification. The consultation sessions highlighted opportunities in religious tourism, wellness, and events, as well as the need for a structured events calendar. This cluster enables Limpopo to respond to evolving traveller preferences and develop high-yield, differentiated experiences.

6.7 Strategic Integration Across Clusters

The six clusters are interdependent and must be marketed under one Limpopo narrative:

1. Nature, Safari & Adventure;
2. Wildlife Economy & Conservation;
3. Family Recreation & Sport;
4. Culture & Heritage;
5. Business Events/ MICE
6. Special Interest Experiences & Lifestyle Events

Cross-cluster synergies; for example, combining heritage with business events or adventure with family recreation, will maximise *yield* and *inclusivity*. Similarly coupling business events with pre and post tours will contribute towards dispersal, inclusion and diversification.

6.8 Strategic Outlook for Cluster Development: 2026 – 2030

By 2030, the cluster approach aims to achieve:

- Balanced spatial growth — equitable distribution of tourism benefits across districts;
- Increased employment — especially youth and women in tourism enterprises;
- Investment mobilisation — through public-private partnerships and impact finance;
- Enhanced sustainability — through conservation partnerships and climate-resilient infrastructure; and
- Unified branding — Limpopo as "Africa's Living Landscape of Heritage and Hope."
- Sustainable Tourism - through integration of Environmental Social, and Governance principles.

7. Tourism Benchmarking Value Chain

The Limpopo Tourism Growth Strategy (2026–2030) emphasises a shift toward **cluster-driven, route-based, value-chain development**. To support this transition, a comprehensive benchmarking value chain framework has been developed to guide the systematic upgrading of tourism experiences, infrastructure, skills, and governance across the province. This framework enables Limpopo to compare its performance against leading domestic, regional, and global destinations, while ensuring alignment with the National Tourism Sector Strategy (NTSS), Tourism Sector Master Plan (TSMP 2023), and the “Protect & Rejuvenate Supply / Re-ignite Demand / Strengthen Enabling Capacity” transformation pillars.

Benchmarking value chains provide a structured method to evaluate strengths, diagnose gaps, and prioritise investment at the levels of **clusters, routes, and specific product categories**. They are especially crucial for Limpopo, which possesses exceptional natural and cultural assets; ranging from the Waterberg Biosphere and Mapungubwe to sacred landscapes, safari and game ranching networks, and fast-growing family leisure circuits. The framework prioritises domestic growth markets while maintaining a competitive edge in international nature-based tourism, adventure, conservation, and the safari-game industry.

7.1 The Benchmarking Value Chain Approach

The benchmarking model is structured around six universal value-chain pillars consistent with UNWTO and WTTC methodologies:

7.1.1 Product & Experience Development

Evaluates the quality, uniqueness, authenticity, infrastructure readiness, interpretation, trail systems, conservation integrity, facilities, and thematic coherence of each product, cluster, and route.

7.1.2 Market Development & Promotion

Assesses digital presence, target segmentation, route branding, visibility, packaging, storytelling, and alignment with national marketing campaigns.

7.1.3 Visitor Services & Amenities

Examines accessibility, safety, route signage, accommodation variety, food services, ablutions, transport options, trailheads, route gateways, and visitor-support systems.

7.1.4 Skills, Capacity & Human Resources

Measures the quality and accreditation of guides, customer service standards, specialist skills (birding, culture, geology, 4x4, conservation), and overall SMME/entrepreneur readiness.

7.1.5 Governance, Partnerships & Institutional Support

Reviews collaboration between LEDET, LTA, district municipalities, landowners, conservation agencies, and route stakeholders; regulatory efficiency; and community participation models.

7.1.6 Enablers & Infrastructure

Covers roads, digital connectivity, signage, border posts (where relevant), conservation infrastructure, tourism safety systems, financing, and environmental management.

Each cluster and route is benchmarked against global and domestic reference points, including the Okavango Delta conservation model, Garden Route family safety standards, Drakensberg hiking networks, Zimbabwe's Great Zimbabwe heritage management, Mauritius' golf tourism model, and leading international scenic route frameworks.

7.2 Benchmarking Value Chains by Cluster

The value chain framework has been systematically applied across Limpopo's six reconfigured tourism clusters to identify performance gaps, investment priorities, and competitive positioning opportunities. The revised clustering reflects a more integrated, activity-based approach aligned to market demand, product strengths, and development potential.

Nature, Safari & Adventure

Benchmarking within this cluster focuses on the quality, diversity, and integration of nature-based and adventure experiences, including safari lodges, protected areas, hiking trails, 4x4 routes, and wilderness experiences. Key performance indicators include biodiversity quality, landscape integrity, trail infrastructure, safety standards, guiding quality, and experiential depth. The cluster is benchmarked against leading destinations such as the Kruger National Park, Namibia's conservation landscapes, and East African safari circuits. Emphasis is placed on strengthening route integration, improving access infrastructure, and enhancing the packaging of multi-activity itineraries that combine wildlife, scenery, and adventure.

Wildlife Economy & Conservation

This cluster is benchmarked against global best practice in conservation-led tourism and sustainable wildlife economies. The focus is on protected area management, biodiversity conservation, community beneficiation, and the commercialisation of wildlife assets through both photographic and regulated hunting models. Key metrics include conservation effectiveness, wildlife population management, anti-poaching measures, revenue generation, and community participation. International frameworks, including those of the International Union for Conservation of Nature, inform benchmarking. The cluster prioritises strengthening conservation governance, expanding community-based conservation models, and enhancing the integration between conservation and tourism value chains.

Family Recreation & Sport

Benchmarking focuses on the accessibility, affordability, and quality of family-oriented and recreational tourism products, including resorts, dam-based recreation, picnic sites, holiday parks, and sport tourism facilities. Key performance indicators include safety, cleanliness, maintenance standards, signage, accessibility, and the quality of recreational infrastructure. The cluster is benchmarked against established domestic destinations such as the Garden Route and the KwaZulu-Natal South Coast. Priority areas include improving public amenity standards, expanding sport and event infrastructure, enhancing digital visibility, and developing packaged, affordable family and group experiences.

Culture & Heritage

This cluster is benchmarked against globally recognised heritage destinations, with a strong focus on the protection, interpretation, and presentation of cultural and historical assets. Key metrics include site management effectiveness, authenticity, storytelling quality, community

involvement, and visitor interpretation infrastructure. Benchmarking draws on international standards such as those promoted by UNESCO World Heritage frameworks and African cultural landscape models. The cluster emphasises strengthening heritage conservation, improving interpretation and storytelling, and positioning Limpopo's cultural landscapes as immersive, experience-led destinations.

Business Events / MICE

Benchmarking is aligned with leading convention and business events destinations, focusing on competitiveness within the meetings, incentives, conferences, and exhibitions (MICE) sector. Key focus areas include venue quality, accommodation capacity, conferencing technology, accessibility, safety, and destination coordination. The cluster is assessed against established convention bureau models across Africa and globally. The establishment of a Limpopo Convention Bureau is identified as a critical enabler, alongside the development of integrated event precincts and targeted business tourism marketing. Emphasis is placed on leveraging urban nodes such as Polokwane to drive regional economic impact and extend visitor stay.

Special Interest Experiences & Lifestyle Events

This cluster encompasses niche and high-value tourism segments, including birding, hiking, pilgrimage, wellness, adventure events, and lifestyle festivals. Benchmarking focuses on route development, specialist guiding capacity, event quality, interpretation systems, and digital integration (including GPX/KML mapping and online platforms). The cluster is benchmarked against globally competitive niche tourism destinations, with emphasis on authenticity, experiential depth, and market differentiation. Priority areas include the formalisation of thematic routes, strengthening event portfolios, enhancing digital accessibility, and positioning Limpopo as a destination for distinctive, experience-led travel.

7.3 Route-Based Benchmarking

Route benchmarking applies a universal value chain to the province's key routes:

- Birding Routes (Soutpansberg–Limpopo; Capricorn–Letaba; Waterberg–Nylsvlei; Kruger-to-Canyon)
- Heritage Routes (Mapungubwe, Limpopo Sacred Landscapes Route, Limpopo Heritage Heartlands Route and Limpopo Living Culture Corridor)
- Stone Kingdoms Limpopo– Zimbabwe)
- Cultural Routes such as the Ribola and Ivory Routes
- Adventure Routes (hiking, 4x4, MTB)
- Golf Routes
- Cross-Border Routes
- Routes are benchmarked against global scenic trail principles, focusing on:
 - Gateway nodes
 - Grading, safety, wayfinding and mapping
 - Interpretation and storytelling
 - Guide accreditation
 - Maintenance and governance
 - Infrastructure and ICT readiness

Cross-border routes add benchmarks for border facilitation, joint marketing, and integrated narratives (e.g., Ancient Civilisations: Mapungubwe–Great Zimbabwe).



7.4 Key Recommendations

- Adopt the value chain as the official provincial benchmarking tool for all clusters and routes from 2025 onward.
- Undertake baseline audits of each cluster and priority route to identify gaps and prioritise investments.
- Allocate funding for route signage, ICT upgrades, branding, gateway infrastructure, and trail rehabilitation.
- Develop 10–12 benchmarked Signature Routes, such as the Limpopo Sacred Landscapes Route, Limpopo Heritage Heartlands Route and Limpopo Living Culture Corridor, Limpopo Birding Mega-Route, Waterberg Adventure Route, and the Stone Kingdoms Transboundary Route with Zimbabwe.
- Establish a Provincial Route Quality Index (PRQI) for annual monitoring and reporting.
- Strengthen partnerships with conservation agencies, private reserves, community custodians, and national tourism bodies to ensure coordinated implementation.

8. Tourism Route Development Opportunities

Tourism route development has emerged as a globally recognised instrument for strengthening destination competitiveness, structuring fragmented attractions, enhancing visitor experience, and expanding tourism benefits into rural communities. A tourism route is not merely a linear pathway but a structured **network of experiences**, integrating landscapes, cultural heritage, activities, accommodation, guiding services, communities and infrastructure under a coherent theme. International literature (Meyer, 2004; Lourens, 2007; UNWTO & ETC, 2017; Pedrosa et al., 2025) shows that routes function most effectively when they incorporate thematic storytelling, inclusive governance, quality assurance, and coordinated marketing.

Within the **Limpopo Tourism Growth Strategy (2026–2030)**, route development provides a practical mechanism to activate provincial tourism clusters, improve spatial distribution of visitor flows, enhance local economic participation, and strengthen Limpopo's position within domestic, regional and cross-border tourism systems. This summary synthesises best-practice route development principles and applies them to Limpopo's unique opportunities, including established birding routes, a proposed Ancient Stone Kingdoms heritage corridor, and emerging cluster-based route concepts such as golfing, culture, craft and scenic touring.

8.2 Why Route Development Matters

Tourism routes respond to several strategic needs:

- **Destination Competitiveness**

Routes integrate individual attractions into coherent, market-ready products that enhance length of stay, visitor spend, and regional visibility.

- **Spatial Development**

They help disperse tourists beyond existing hubs (e.g., Polokwane, Hoedspruit), stimulating underdeveloped rural areas and enhancing geographic equity.

- **Community Benefits**

Routes strengthen local value chains through community guiding, craft markets, homestays and small enterprises.

- **Heritage Conservation**

They create interpretive frameworks that deepen visitor understanding of cultural and natural heritage, supporting conservation and awareness.

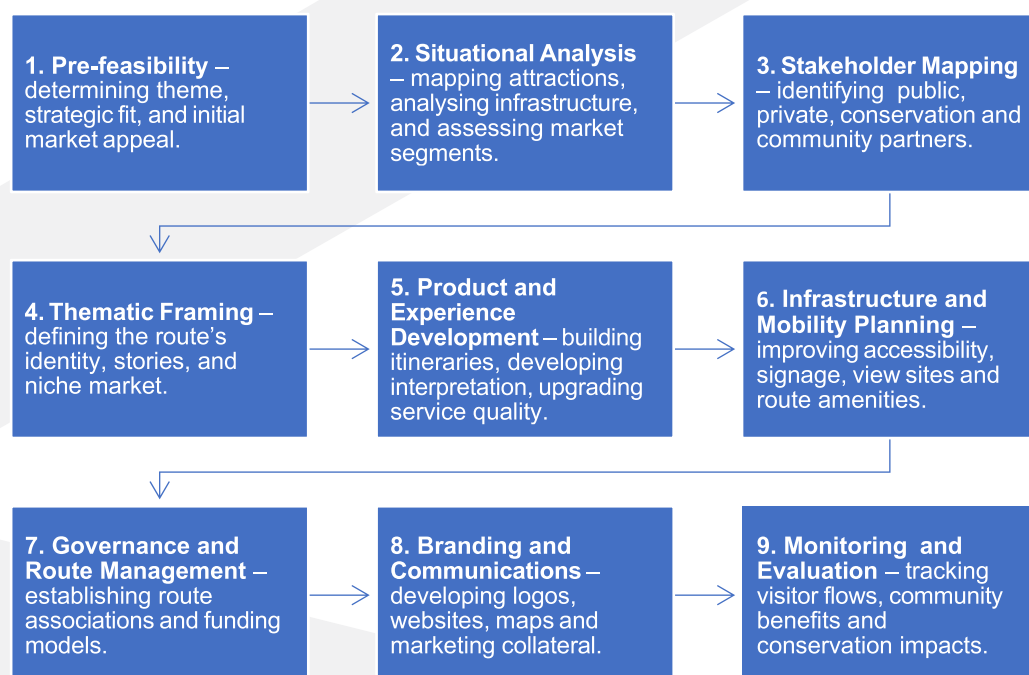
- **Marketing**

Routes offer strong narrative branding (e.g., ancient civilisations, birding, scenic highlands), making them easy to promote across digital and trade platforms.

8.3 Methodology for Developing Tourism Routes

International best practice highlights a structured process for tourism route development; as depicted below:

Figure 19: Route development methodology



The Limpopo Department of Economic Development, Environment and Tourism (LEDET) recognises route development as a central strategic mechanism for activating the Tourism Growth Strategy and unlocking the full potential of Limpopo's six tourism clusters. Route-based development enables the spatial organisation of tourism assets, strengthens product integration, enhances visitor dispersal, and supports coordinated marketing across priority corridors and nodes. The following clusters are particularly suited to activation through structured route development:

Nature, Safari & Adventure

Integrated nature-based routes linking protected areas, private reserves, scenic landscapes, and adventure nodes. These include safari circuits, wilderness trails, 4x4 routes, and multi-day hiking networks that combine wildlife viewing with outdoor adventure. Emphasis is placed on creating coherent geographic corridors that enable seamless movement between parks, lodges, and activity sites, while strengthening interpretation, access, and route signage.

Wildlife Economy & Conservation

Specialised conservation-led routes connecting provincial parks, private reserves, community conservancies, and wildlife economy nodes. These routes support both photographic tourism and regulated hunting, while highlighting conservation practices, biodiversity stewardship, and community participation. They are designed to demonstrate the integration of conservation and tourism value chains, with a strong focus on sustainability, governance, and local economic benefit.

Family Recreation & Sport

Accessible leisure and recreation routes focused on dams, rivers, resorts, holiday parks, and sport facilities. These include family-friendly touring loops, short-break circuits, and sport tourism routes linked to events, tournaments, and outdoor recreation hubs. The emphasis is on affordability, accessibility, and ease of travel, with clearly packaged itineraries designed for domestic and regional markets.

Culture & Heritage

Thematic heritage routes that organise Limpopo's cultural landscapes into coherent visitor experiences. These include established and proposed routes such as the Ancient Stone Kingdoms Route, Sacred Landscapes Route, Heritage Heartlands Route, and Living Culture Corridors. The focus is on linking archaeological sites, heritage towns, cultural landscapes, and community-based experiences through strong storytelling, interpretation, and local participation.

Business Events / MICE

Strategic corridors linking key urban nodes, conferencing venues, accommodation hubs, and supporting infrastructure. These routes enable the packaging of meetings, incentives, conferences, and exhibitions with leisure extensions, including safari, cultural, and recreational experiences. The emphasis is on connectivity, accessibility, and integrated destination packaging, particularly around primary nodes such as Polokwane and other emerging business event centres.

Special Interest Experiences & Lifestyle Events

Niche and experience-led routes designed around specific interests and motivations, including pilgrimage corridors, birding routes, geo-tourism trails, wellness journeys, and lifestyle or event-based itineraries. These routes cater to high-value and purpose-driven visitor segments, with strong emphasis on route definition, specialist guiding, digital mapping (GPX/KML), and immersive, authentic experiences.

Cluster committees are encouraged to utilise route development as a practical implementation tool to organise and package tourism products, strengthen local economic linkages, enhance SMME participation, and coordinate marketing and investment efforts across districts and municipalities.

8.4 Consolidated Route Development and Packaging Framework for Limpopo

Limpopo already has a substantial base of tourism routes that can be strengthened, refined and repositioned within a more coherent provincial route development framework. Existing routes identified in the approved route packaging work include the African Ivory Route, Greater Mapungubwe Heritage Route, Waterberg Meander Route, R71 Route, Valley of Olifants Route, Escarpment Route, Sekhukhune Routes, Open Africa-linked routes, Bush to Beach Route, Seraki Blouberg Route and Limpopo Birding Routes. These provide a strong practical platform for route-based tourism development, but require clearer thematic positioning, improved packaging, stronger signage, better digital presentation and closer linkage to cluster development priorities.

The route packaging work already shows that Limpopo's routes are diverse in character, spanning wildlife, cultural heritage, adventure, sport, ecotourism, birding, pilgrimage, arts and cross-border tourism. The opportunity now is not to start from scratch, but to consolidate and strengthen what already exists while incorporating additional high-potential routes and thematic corridors identified in more recent route planning work.

8.4.1 Existing Provincial Route Base

The existing packaged routes form the core of Limpopo's current tourism route system. These include:

8.4.1.1 African Ivory Route

A well-established and registered experiential route linking parts of Waterberg, Capricorn, Mopani and Vhembe. It combines wilderness areas, conservation assets, cultural camps, community-based tourism experiences and heritage sites, and remains one of the province's strongest route development foundations.

8.4.1.2 Greater Mapungubwe Heritage Route

A major cultural, natural and heritage corridor in Vhembe, anchored by Mapungubwe, Dzata, Thulamela, Schoemansdal, Lake Fundudzi and related heritage landscapes. This route has strong potential for repositioning as a flagship heritage tourism offering of provincial and international significance.

8.4.1.3 Waterberg Meander Route

A well-established and signposted route built around ecotourism, wildlife, culture, heritage and sport. It links attractions such as Nylsvlei, Marakele, the Waterberg Biosphere, Bela-Bela hot springs, Makapan Valley and associated scenic and cultural assets.

8.4.1.4 R71 Route

A highly strategic tourism corridor connecting Polokwane, Magoebaskloof, Haenertsburg, Tzaneen, Gravelotte, Phalaborwa and the Kruger gateway. It incorporates pilgrimage, cultural attractions, entertainment, nature, adventure and scenic mountain landscapes. It is already

recognised as one of Limpopo's most useful and scenic tourism corridors and should be prioritised for further development and signposting.

8.4.1.5 Valley of Olifants Route

A route with strong wildlife, cultural heritage, golf, adventure and aviation-related appeal, incorporating major attractions such as the Kruger gateway, Modjadji, Letaba Elephant Hall, rehabilitation centres and nature attractions. It has significant tourism value but still requires stronger route identity and coordinated packaging.

8.4.1.6 Escarpment Route

An existing route focused on adventure, wildlife and avi-tourism, with strong scenic and outdoor appeal linked to Magoebaskloof, Ebenezer, Bewaarskloof and related mountain landscapes. It overlaps strongly with the Wolkberg and R71 tourism geography and should be positioned more clearly within an integrated escarpment product system.

8.4.1.7 Sekhukhune Routes

These routes include heritage, geo-tourism, agriculture, events and cultural tourism elements, including Tjate Heritage Route, Mapoch's Cave, St Manche Masemola, the Platinum Route and various landscape and village attractions. They represent an important area for route consolidation and stronger thematic packaging.

8.4.1.8 Ribola Art Route

A distinctive cultural tourism route focused on indigenous art, craft, studios, galleries and living creative traditions in the province's northern areas. This route has strong potential for niche cultural tourism and creative economy development.

8.4.1.9 Bush to Beach Route

An existing cross-border experiential route linking Mopani with Mozambique through wildlife, Tsonga culture, textiles and coastal tourism. It already demonstrates the value of route-based regional tourism linkages and could be further developed as a transfrontier leisure product.

8.4.1.10 Limpopo Birding Routes

BirdLife South Africa has already established two major birding routes in Limpopo: the Capricorn–Letaba Birding Route and the Waterberg–Nylsvlei Birding Route. These routes provide a strong base for nature-based tourism, bird guide development and conservation-linked visitor experiences. The Waterberg–Nylsvlei area is internationally recognised for wetland and raptor birding, while the Capricorn–Letaba corridor offers exceptional altitudinal and habitat variation. These routes form the foundation for a broader Limpopo Birding Route Network, including possible cross-border extensions into Botswana and Zimbabwe.

8.4.2 New and Expanded Route Opportunities

In addition to existing packaged routes, a number of important route opportunities have been identified which should be developed, rejuvenated, packaged and promoted in a coordinated way.

Ancient Stone Kingdoms Route

This is one of the province's most significant strategic opportunities. It would connect major archaeological and heritage landscapes in Limpopo with linked sites in Zimbabwe and Botswana, including Schroda, K2/Bambandyanalo, Mapungubwe Hill and Thulamela, together with Great Zimbabwe, Khami, Danangombe, Naletale, Ziwa and Domboshaba. This route would interpret the continuum of southern African civilisations associated with Mapungubwe, Great Zimbabwe and related stone-building cultures, and could reposition the Limpopo–Zimbabwe basin as one of Africa's great heritage tourism corridors.

Limpopo Golfing Route

The proposed golfing route would link Euphoria, Zebula, Elements, Koro Creek, Polokwane Golf Club and Hans Merensky with safari lodges, wellness facilities and business events venues. This provides a strong basis for a higher-value leisure and corporate product, particularly in the Waterberg, Polokwane and eastern tourism system.

Bela-Bela Route

The Bela-Bela route has strong potential as a nature-based, wellness and leisure corridor built around warm mineral springs, resorts, lodges, family recreation and bushveld escapes. It also offers scope for stronger cultural tourism and SMME linkages with surrounding communities, while functioning as both a destination in its own right and a gateway to the wider Waterberg Biosphere.

Wolkberg Tourism Route

The Wolkberg route follows the scenic escarpment between Polokwane, Haenertsburg, Magoebaskloof and Tzaneen. With its forests, mountains, rivers, biodiversity and adventure opportunities, it is one of Limpopo's strongest scenic and nature-based route prospects. It also serves as an important connector between the escarpment, the Lowveld and the Kruger gateway system.

Limpopo Sacred Landscapes Route

This proposed route would package sacred sites, pilgrimage landscapes, spiritual heritage locations and associated cultural narratives into a distinctive heritage and living-culture experience. It has strong potential for both domestic cultural tourism and deeper interpretation of place-based belief systems.

Limpopo Heritage Heartlands Route

This route would draw together significant historical settlements, archaeological resources, liberation and colonial-era sites, royal landscapes and heritage towns into a coherent province-wide cultural product.

Limpopo Living Culture Corridor

This corridor would focus on living traditions, indigenous knowledge, village-based experiences, craft, performance and local cuisine. It would be particularly valuable for community-based tourism development and for strengthening participation of local enterprises in route packaging.

Waterberg Scenic Loop, Vhembe Geotrail and Great Rivers Route

These scenic and nature-based concepts offer additional opportunities for self-drive touring, geotourism, river-based landscapes and thematic dispersal into less-visited parts of the province. They should be developed further as secondary routes and packaged into digital itineraries and cluster-based promotion.

8.4.3 Insight and Implications

Taken together, the existing routes and the newly identified opportunities show that Limpopo already possesses the building blocks of a diversified and highly marketable provincial route network. What is required is a more deliberate route development programme that:

- consolidates overlapping routes and clarifies route themes;
- upgrades product packaging, signage and wayfinding;
- links routes more directly to cluster development and destination marketing;
- supports local guides, SMMEs and community tourism enterprises along routes;
- strengthens digital route presentation through maps, itineraries and online referral systems; and
- develops selected flagship routes of national and cross-border significance.

In practical terms, some routes are already relatively mature, such as the African Ivory Route, Waterberg Meander Route and parts of the birding network, while others are better understood as corridors with strong future potential, such as the Ancient Stone Kingdoms Route, Bela-Bela Route, Wolkberg Tourism Route and the proposed cultural routes. The route strategy should therefore distinguish between established routes, routes requiring rejuvenation, and new routes requiring full concept development and market testing.

Implementation priorities

Identify priority routes (Birding Network, Ancient Stone Kingdoms, Golfing Route)

Prioritising these flagship routes provides a focused foundation for phased development and investment. Each route aligns with Limpopo's competitive strengths and enables the province to package high-value, experience-driven tourism corridors.

Establish route working groups under relevant clusters

Dedicated working groups ensure coordinated planning, stakeholder alignment, and technical oversight within each thematic cluster. This structure strengthens accountability and accelerates implementation across government, private sector, and community partners.

Develop GIS datasets (nodes, routes, service points)

A consolidated GIS database will map attractions, access routes, amenities, and service gaps, enabling evidence-based planning. This spatial intelligence supports route optimisation, investment targeting, and improved visitor navigation.

Create interpretive content (maps, narratives, signage concepts)

Developing compelling interpretive material enhances the storytelling power of each route and elevates visitor experience. Maps, narratives, and signage concepts ensure consistent branding and a coherent sense of place across the province.

Strengthen governance and partnership models

Robust governance frameworks will formalise roles, responsibilities, and collaboration mechanisms across stakeholders. This ensures long-term sustainability, shared ownership, and improved resource mobilisation for route development.

Pilot itineraries and stakeholder consultations

Testing sample itineraries allows for real-world validation of route feasibility, product readiness, and visitor flow. Ongoing consultations refine the offering, build buy-in, and ensure that local communities and operators shape the final product.

Launch coordinated marketing platforms

A unified marketing approach will position Limpopo's routes under a cohesive brand, improving visibility and market reach. Digital platforms, campaigns, and trade engagement will drive demand and support route uptake once operational.

8.4.4 Recommended Route Development Categories

For planning purposes, Limpopo's routes can be grouped into three broad categories:

1. Established routes to strengthen and refresh

African Ivory Route, Waterberg Meander Route, Limpopo Birding Routes, Bush to Beach Route, Ribola Art Route and parts of the Sekhukhune route system.

2. Strategic corridors requiring coordinated development and clearer packaging

R71 Route, Valley of Olifants Route, Escarpment/Wolkberg corridor, Greater Mapungubwe Heritage Route and Bela-Bela route system.

4. New flagship opportunities for phased development

Ancient Stone Kingdoms Route, Limpopo Golfing Route, Limpopo Sacred Landscapes Route, Limpopo Heritage Heartlands Route, Limpopo Living Culture Corridor, Waterberg Scenic Loop, Vhembe Geotrail and Great Rivers Route.

9. New Domestic Tourism Growth Areas

Domestic tourism has become the most important driver of South Africa's tourism recovery and long-term sustainability. National tourism data indicates a strong rebound, with more than 40 million overnight trips and 123-million-day trips taken in 2024.

This resurgence is underpinned by a widespread preference for affordable, short-break, self-drive travel; the enduring strength of the Visiting Friends and Relatives (VFR) segment; and the growing domestic appeal of authentic cultural, nature-based, and event-driven experiences. Household budget pressures continue to shape consumer choices, reinforcing the need for value-for-money products, safe travel environments, and convenient destinations close to major metros.

Limpopo is well positioned to benefit from these trends. It remains one of South Africa's leading domestic destinations and consistently draws large numbers of travellers from Gauteng, North West, Mpumalanga and neighbouring SADC countries. The province offers strong competitive advantages, including rich cultural traditions, sacred and heritage landscapes, major pilgrimage centres, extensive protected areas, abundant outdoor recreation assets, and a diverse township and village economy. However, the tourism economy remains unevenly distributed, with limited product diversification outside major flagship areas such as Greater Kruger and parts of the Waterberg. To strengthen resilience, inclusivity and geographical spread, Limpopo now requires a targeted focus on new and under-leveraged domestic tourism growth areas.

This summary presents ten priority domestic tourism growth areas identified through the broader Tourism Growth Strategy analytical process, aligning them with domestic market trends, demand expectations, and Limpopo's strategic planning framework.

9.1 Key Domestic Tourism Trends Influencing Limpopo

A synthesis of national and provincial data highlights several clear patterns shaping domestic travel behaviour:

- **Short-break, self-drive travel dominates:** Most domestic trips are two to four nights in length and use private vehicles, making drive-to destinations highly competitive.
- **Affordability is central:** Domestic travellers are price-sensitive and increasingly favour self-catering, camping, low-cost outdoor activities, and destinations near major population centres.
- **VFR travel remains the largest segment:** This creates strong opportunities to convert VFR flows into paid cultural, nature, and leisure experiences.
- **Cultural, township, creative and food experiences are growing in appeal:** Travellers seek authentic, community-rooted experiences that are easy to book and access.
- **Faith-based travel is a major driver:** Limpopo is home to some of the largest religious gatherings in the region, presenting a major under-leveraged opportunity.
- **Outdoor recreation continues to expand:** Hiking, trail running, mountain biking, river and dam recreation, and adventure travel resonate strongly with younger and middle-income domestic travellers.
- **Events trigger significant mobility:** Football matches, marathons, trail races, church events, music festivals and rural sports tournaments all stimulate domestic trips.
- **Emergence of blended travel ("workations"):** Scenic, safe, cool-climate areas are increasingly attractive for remote work, retreats and extended stays.

These trends underpin the growth areas proposed below.

9.2 Priority Domestic Tourism Growth Areas

Gauteng–Limpopo Self-Drive Short-Break Loops

Structured two- to four-night loops linking small towns, dams, escarpments, forests and cultural landscapes. These loops appeal to Gauteng self-drive markets seeking affordable, flexible travel. They create distribution across Capricorn, Waterberg, Vhembe, Mopani and Sekhukhune.

Polokwane and Seshego Urban Breaks and Events Hub

Polokwane can evolve into a domestic city-break destination anchored on stadium events, township cuisine, nightlife, creative industries, and accessible nature areas such as the Polokwane Game Reserve.

Faith and Pilgrimage Tourism Circuit

A structured circuit around ZCC Moria, St Engenas and other fast-growing churches, supported by homestays, shuttle services, dining nodes and post-service nature/cultural excursions. This targets massive annual domestic flows.

Dams and Inland Leisure

A family-oriented offering around key dams such as Ebenezer, Nandoni, NZhelele, Flag Boshielo, Glen Alpine, Doorndraai and Mokolo. Activities include swimming, fishing, paddling, picnics, braai sites, and small festivals.

Hiking, Trail Running and Mountain Biking Networks

Magoebaskloof, Wolkberg, Waterberg and Soutpansberg can become signature adventure destinations through connected trails, graded routes, digital mapping and annual events.

Ribola–Giyani Creative and Cultural Routes

Immersive cultural experiences involving craft workshops, food, rituals, storytelling, sacred sites, music and dance. This involves transitioning from static cultural villages to bookable, hosted experiences.

Sekhukhune Mining and Heritage Belt

A heritage-learning route integrating mining landscapes, labour migration narratives, resistance history, and adjacent rural cultural experiences, supported by guided storytelling and safe viewing points.

Sports, Stadium and Rural Events Tourism

A provincial events calendar integrating stadium football matches, rural soccer tournaments, fishing competitions, marathons, trail runs and festivals in Capricorn, Vhembe, Waterberg and Mopani.

Highlands Workation and Retreat Corridors

Magoebaskloof, Waterberg and the Soutpansberg are ideal for remote-working and wellness retreats. This segment requires upgraded connectivity, tranquil settings, nature access, and off-peak pricing packages.

Domestic Small-Meetings and Retreats Circuit

A network of small conference and retreat venues suitable for government lekgotlas, corporates and associations, paired with leisure add-ons such as game drives, forest walks, cultural visits, dams and scenic lookouts.

9.3 Implications

Domestic tourism trends in South Africa are shifting rapidly, creating new opportunities for Limpopo to strengthen its competitiveness and broaden its tourism economy. The province is well positioned to benefit from rising demand for affordable, short-break, self-drive travel; authentic cultural and nature-based experiences; and event-driven mobility. To fully leverage these trends, the Limpopo Tourism Strategy must adopt a more diversified, inclusive, and spatially balanced approach to destination development.

A key implication is the need to prioritise short-break, self-drive markets, which dominate domestic travel behaviour. Limpopo's proximity to Gauteng gives it a natural advantage, requiring investment in drive-to routes, affordable accommodation, clear signage, and safe, well-serviced travel corridors. At the same time, the province must diversify its product base beyond established flagship areas by developing underutilised destinations such as dams and inland leisure nodes, cultural and creative routes, heritage landscapes, and highland retreat corridors. This will support more equitable regional development and spread tourism benefits across districts.

Affordability and safety remain central to domestic decision-making. The strategy must therefore promote value-for-money offerings, including self-catering, camping, low-cost outdoor recreation, and township-based experiences, while strengthening visitor safety and assurance measures. Another major opportunity lies in faith-based tourism, where Limpopo hosts some of the largest religious gatherings in Southern Africa. Formalising pilgrimage circuits, improving logistics, and linking faith travel to cultural and nature excursions can unlock significant economic value.

Events are a powerful driver of domestic mobility. A coordinated provincial events calendar, combined with support for rural and township events, can stimulate year-round travel and increase local spending. Similarly, the growing popularity of outdoor recreation and adventure tourism requires investment in trail networks, digital mapping, adventure events, and low-impact infrastructure. Cultural and creative tourism must also evolve toward authentic, hosted, bookable experiences, including workshops, storytelling, food culture, and sacred-site interpretation. Events must also be strongly linked to pre and post business event tours to increase length of stay and stimulate spend.

Emerging trends such as workations and wellness retreats offer opportunities to stabilise off-peak demand, particularly in highland areas suited to remote work and nature-based escapes. In addition, Limpopo can strengthen its domestic MICE footprint by developing small-meeting venues and nature-based executive retreats that combine business with leisure. Finally, the province must convert high volumes of Visiting Friends and Relatives (VFR) travel into paid tourism by improving signage, safety, micro-enterprise support, and bookable township and village experiences.

Overall, the strategy must shift from reliance on flagship wildlife assets to a *diversified, experience-rich, community-rooted, and spatially inclusive tourism economy*. By aligning development with domestic trends; affordability, authenticity, events, outdoor recreation, faith travel, and short-break mobility, Limpopo can unlock new markets, extend visitor stays, achieve greater tourism dispersal, stimulate township and rural economies and build long-term resilience.

10. Marketing and Brand Strategy Framework

Global tourism marketing is increasingly adopting experiential, sustainable, and technology-driven strategies to foster authentic engagement with destinations. Key trends include personalized and slow travel, which emphasize immersive experiences over traditional sightseeing. Furthermore, marketers are focusing on wellness, responsible travel, and transformational experiences to align with travellers' desires for personal growth and positive societal contributions.

The situational analysis highlights a clear opportunity for Limpopo to respond to these trends and position itself as a leading destination for both the domestic and international market. In this regard there are huge opportunities to attract particularly the domestic market concentrated in Gauteng and neighbouring provinces. This requires integrated marketing efforts that elevate the province's emerging cultural, faith-based, trail, urban, and event-driven products, ensuring they are visible, compelling, and competitively positioned.

The recommended Marketing and Branding Framework sets out the strategic direction emerging from the situational analysis and its demand-side implications, providing a coherent basis for how the province will stimulate tourism growth. By aligning provincial marketing priorities with these evolving traveller preferences, the Marketing and Branding Framework provides a structured foundation for demand generation, brand strengthening, and deeper engagement with both existing and new market segments.

The schematic below presents the strategic implications of these global trends as addressed in the LTGS:

Figure 20: Strategic implications of global trends



10.1 Strategic Direction

In alignment with the strategic priorities of the Limpopo Tourism Growth Strategy (LTGS), it is recommended that the province's destination marketing strategy framework span a three- to five-year period to stimulate economic growth by attracting high-value visitors. The strategy should define balanced market segments and target audiences, establish a distinctive brand, and implement multi-channel promotion consistent with the tourism product portfolio, including refined clusters and routes as identified or approved in the LTGS. The recommended strategic direction and thrust, consistent with the LTGS, are illustrated in the figure below.

Figure 21: Strategic Direction

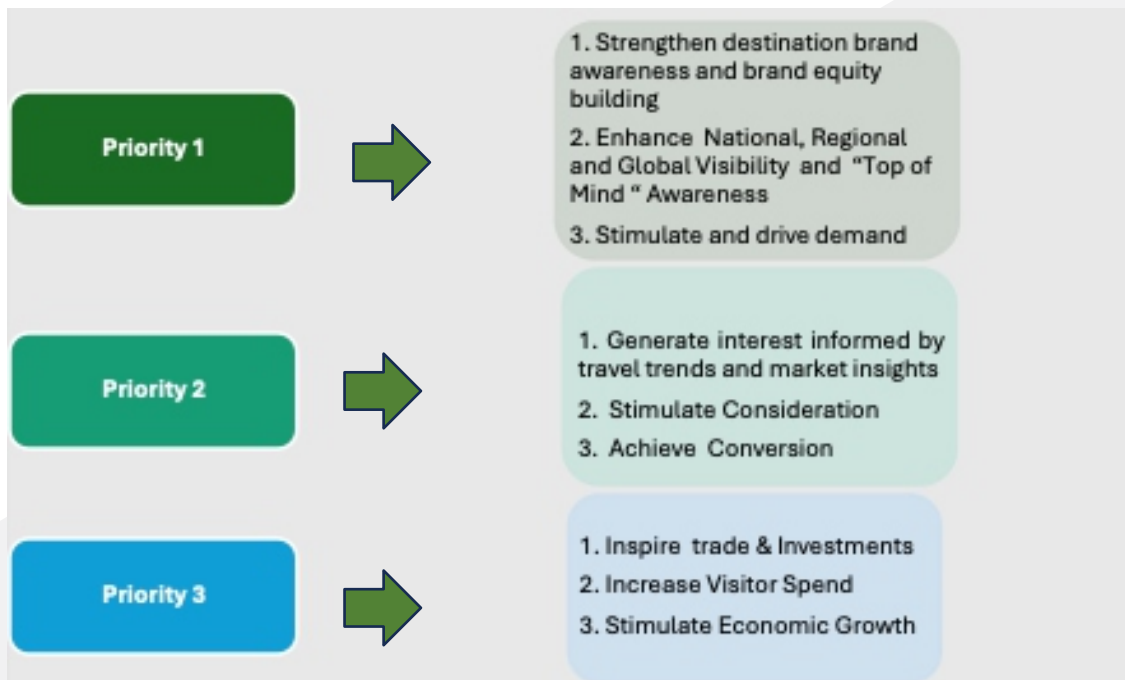


10.2 Goals and Objectives

The strategic goals and objectives of the Marketing and Branding Framework must be firmly aligned with the overarching objectives of the Limpopo Tourism Growth Strategy, ensuring that destination promotion directly supports the province's broader economic and developmental priorities. In line with the LTGS's strategic direction, the Framework should guide a three- to five-year destination marketing horizon focused on attracting high-value visitors and strengthening Limpopo's competitiveness. This requires clearly defined market segments and target audiences, a distinctive and coherent provincial brand, and multi-channel promotional approaches that reflect the province's approved tourism product portfolio, including its refined clusters and routes. Together, these elements provide the foundation for a coordinated and evidence-based marketing thrust, illustrated in the figure below, that positions Limpopo for sustained tourism growth and enhanced market visibility.

This approach is expected to enhance the Province's positioning and destination marketing:

Figure 22: Goals & Directions



10.3 Critical Success Factors

The successful implementation of the Marketing and Branding Framework depends on a set of interrelated enablers that ensure Limpopo's destination marketing efforts are evidence-based, competitive, and aligned with the LTGS's long-term growth objectives. These critical success factors strengthen institutional capacity, enhance market responsiveness, and ensure that the province's tourism brand remains credible, compelling, and trusted by both visitors and investors.

10.3.1 Evidence-Driven Market Intelligence

Robust and continuous market intelligence is essential to guide strategic decisions, refine target markets, and ensure that promotional investments yield measurable returns. This includes understanding traveller behaviour, demand trends, competitor positioning, and the performance of Limpopo's tourism products and routes as well as:

- Investing in ongoing market research and analytics to inform campaign design and market prioritisation.
- Monitoring domestic and regional travel patterns to optimise drive-to and short-break positioning and
- Using data to evaluate campaign performance and adjust strategies in real time.

10.3.2 Strengthening and Refreshing the Limpopo Tourism Brand

A distinctive, credible, and refreshed brand identity is central to positioning Limpopo as a preferred destination. The brand must reflect the province's authentic value proposition and align with the LTGS's product clusters and routes.

Recommended interventions:

- Review and refresh the provincial tourism brand to ensure relevance and competitiveness.
- Strengthen brand consistency across all platforms, partners, and campaigns.
- Embed the brand narrative in all communication, emphasising authenticity, culture, nature, and accessibility.

10.3.3 Deepening Strategic and Non-Traditional Partnerships

Collaborative partnerships expand reach, enhance credibility, and unlock new markets. Partnerships must extend beyond traditional tourism actors to include private sector, communities, technology partners, and non-tourism sectors.

Recommended interventions:

- Strengthen partnerships with industry stakeholders, including operators, DMOs, and product owners.
- Develop non-traditional partnerships (e.g., retail, logistics, financial services) to broaden market access.
- Leverage regional and national platforms to amplify Limpopo's visibility.

10.3.4 Skills Development and Capacity Building

Effective marketing requires skilled personnel, capable institutions, and empowered local stakeholders who can deliver high-quality visitor experiences aligned with the brand promise.

Recommended interventions:

- Invest in marketing, digital, and brand-management skills within provincial and local tourism structures.
- Strengthen capacity across tourism enterprises, especially SMMEs, to align with market expectations.
- Promote continuous professional development to sustain excellence in service delivery.

10.3.5 Restoring Traveller and Investor Confidence

Confidence is a prerequisite for travel and investment. Limpopo must demonstrate reliability, safety, and readiness to welcome visitors and investors.

Recommended interventions:

- Promote safety, service quality, and destination readiness as core brand attributes.
- Communicate positive stories and improvements to rebuild trust among domestic and regional travellers.
- Engage investors with clear, credible information on opportunities and enabling conditions.

10.3.6 Technology-Enabled Smart Marketing

Digital transformation is central to modern tourism marketing. Limpopo must adopt technology that enhances visibility, accessibility, and engagement across all stages of the visitor journey.

Recommended interventions:

- Invest in digital platforms, smart tools, and data systems that support targeted marketing.
- Ensure bookable products, mobile-friendly content, and curated itineraries are widely accessible.
- Adopt innovative digital campaigns that align with global trends in experiential and personalised travel.

10.3.7 Emphasis on Place-Making and Place-Marketing

A strong destination brand must be reinforced by the quality and distinctiveness of the places themselves. Place-making ensures that Limpopo's towns, attractions, and routes offer memorable, coherent, and market-ready experiences.

Recommended interventions:

- Strengthen the appeal and functionality of key tourism nodes and routes through coordinated place-making.
- Promote unique cultural, natural, and heritage assets as anchors of the provincial brand.
- Align local development initiatives with the LTGS's product clusters and marketing priorities.

10.4 Source Markets and Market Segmentation

A robust, hybrid multi-stage approach is recommended for market segmentation in Limpopo. This method should incorporate geographic, demographic, psychographic, and behavioural variables (as shown below), along with visitor data from South African Tourism and Statistics South Africa, supported by statistical analysis. This process will enable the identification of viable target markets and support benefit segmentation, which is widely regarded as the most effective way to understand tourist needs. It is therefore recommended that the Limpopo Tourism Agency's (LTA) marketing segmentation be guided by established destination marketing segmentation principles, as outlined below.

The province should aim to align as closely as possible with South African Tourism's Market Prioritisation and Investment Framework (MPIF) to ensure economies of scope and scale in the marketing effort.

Figure 23: SAT Prioritisation Framework

Rank	Markets	Market Share, 2019	Market Share, 2023	Goal for 2030 Market Share	Target Market Share, 2030	Arrivals, 2023	Arrivals Target, 2030	Arrivals CAGR, 2024-30 (Based on defined goals)
1	Lesotho	94.13%	96.34%	Maintain 2023 Market Share	96.34%	1,151,560	2,200,417	5.83%
2	Botswana	72.18%	71.85%	Maintain 2023 Market Share	71.85%	360,680	933,543	8.53%
3	Zambia	13.10%	14.08%	Maintain 2023 Market Share	14.08%	143,100	206,640	2.53%
4	Namibia	20.16%	49.84%	Maintain 2023 Market Share	49.84%	159,330	256,457	4.83%
5	Malawi	27.46%	24.91%	Maintain 2023 Market Share	24.91%	135,170	257,396	5.72%
6	Zimbabwe	57.07%	71.15%	Maintain 2023 Market Share	71.15%	2,058,650	3,421,818	5.53%
7	Swaziland	92.66%	92.97%	Maintain 2023 Market Share	92.97%	713,100	1,347,391	5.32%
8	Mozambique	70.38%	78.43%	Maintain 2023 Market Share	78.43%	1,315,470	1,983,150	5.28%
9	USA	0.29%	0.28%	Improve competitive position as per the target	0.41%	349,840	657,042	7.99%
10	Australia	0.60%	0.51%	Improve competitive position as per the target	1.21%	83,740	215,221	10.71%
11	United Kingdom	0.49%	0.42%	Improve competitive position as per the target	0.79%	355,720	782,207	9.20%
12	Japan	0.11%	0.09%	Improve competitive position as per the target	0.11%	12,100	39,634	11.65%
13	France	0.31%	0.23%	Improve competitive position as per the target	0.31%	117,960	311,725	8.88%
14	India	0.44%	0.41%	To reach Pre-Covid level Market Share i.e. 2019	0.88%	77,930	175,127	10.10%
15	Germany	0.28%	0.21%	Improve competitive position as per the target	0.28%	243,440	510,752	7.10%
16	China	0.09%	0.08%	To reach Pre-Covid level Market Share i.e. 2019	0.14%	34,540	172,700	13.63%
17	Canada	0.17%	0.15%	Improve competitive position as per the target	0.20%	54,600	108,569	6.44%
18	Spain	0.15%	0.11%	Improve competitive position as per the target	0.15%	29,060	60,426	9.22%
19	Nigeria	2.55%	1.33%	To reach Pre-Covid level Market Share i.e. 2019	2.55%	18,290	53,595	13.10%
20	Kenya	3.00%	3.11%	Improve competitive position as per the target	3.19%	40,960	47,798	3.51%
21	Italy	0.18%	0.15%	Improve competitive position as per the target	0.18%	47,430	101,543	7.66%
22	Russia	0.05%	0.11%	Improve competitive position as per the target	0.24%	27,710	51,165	13.19%
23	Uganda	4.30%	1.26%	Improve competitive position as per the target	3.36%	12,720	29,142	7.35%
24	United Arab Emirates	0.09%	0.07%	Improve competitive position as per the target	0.20%	3,150	7,033	12.14%
25	Netherlands	0.42%	0.34%	Improve competitive position as per the target	0.56%	128,560	246,104	7.42%
26	Brazil	0.67%	0.26%	Improve competitive position as per the target	0.67%	25,650	144,439	15.74%

© 2024 Escalent | Page 28

Legend: Defend (Green), Growth (Yellow), Watchlist (Blue), New Added market (Blue with +)

Alignment with South African Tourism Segments

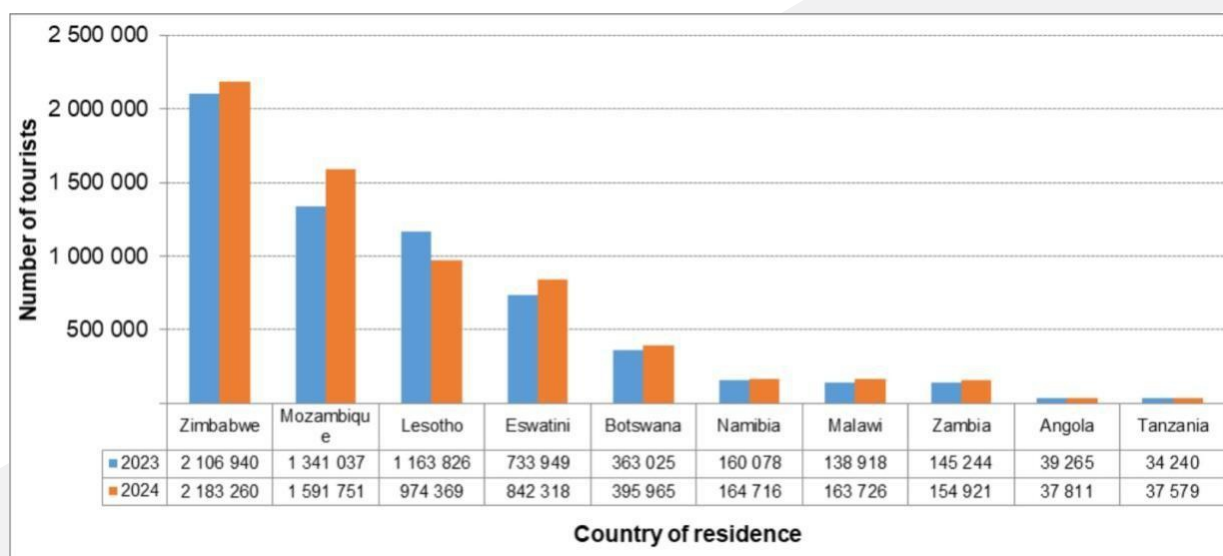
In 2025, South Africa's tourism sector reached record growth, with international arrivals surpassing 10 million for the first time (10.48 million from January to December). This increase was driven by strong results in African land and air markets, as well as a notable recovery from Europe and North America. Between January and September 2025, international arrivals totalled 7,634,261, an increase of over 1.1 million compared to the same period in 2024. Arrivals from Africa's land markets grew by 26.7%, Africa's air markets by 28%, Europe by 29%, and North America by 22%.

In September 2025, there were 846,367 visitors, a 26.9% increase from September 2024. Zimbabwe remained the top source market, while the United Kingdom saw 7.4% growth in early 2025.

Top Ten SADC Source Markets (2024)

The figure below shows the ten leading countries for tourists from the SADC region in 2024.

Figure 24: Top SADC Source Markets



The top ten land markets were Zimbabwe (2,183,260; 33.1%), Mozambique (1,591,751; 24.1%), Lesotho (974,369; 14.8%), Eswatini (842,318; 12.8%), Botswana (395,965; 6.0%), Namibia (164,716; 2.5%), Malawi (163,726; 2.5%), Zambia (154,921; 2.3%), Angola (37,811; 0.6%), and Tanzania (37,579; 0.6%). Tourist volumes increased in eight of the ten leading SADC countries from 2023 to 2024. Mozambique experienced the highest growth at 18.7%. (Source: South African Tourism, 2025)

Top Ten Leading Source Markets (The rest of Africa)

According to South African Tourism data, the top ten African countries of origin for air travellers to South Africa in 2024 **were** Kenya (47,852; 28.5%), Ghana (36,656; 21.8%), Nigeria (22,511; 13.4%), Uganda (12,788; 7.6%), Ethiopia (7,432; 4.4%), Egypt (5,956; 3.5%), Cameroon (4,474; 2.7%), Gabon (4,210; 2.5%), Côte d'Ivoire (2,544; 1.5%), and Benin (2,052; 1.2%)

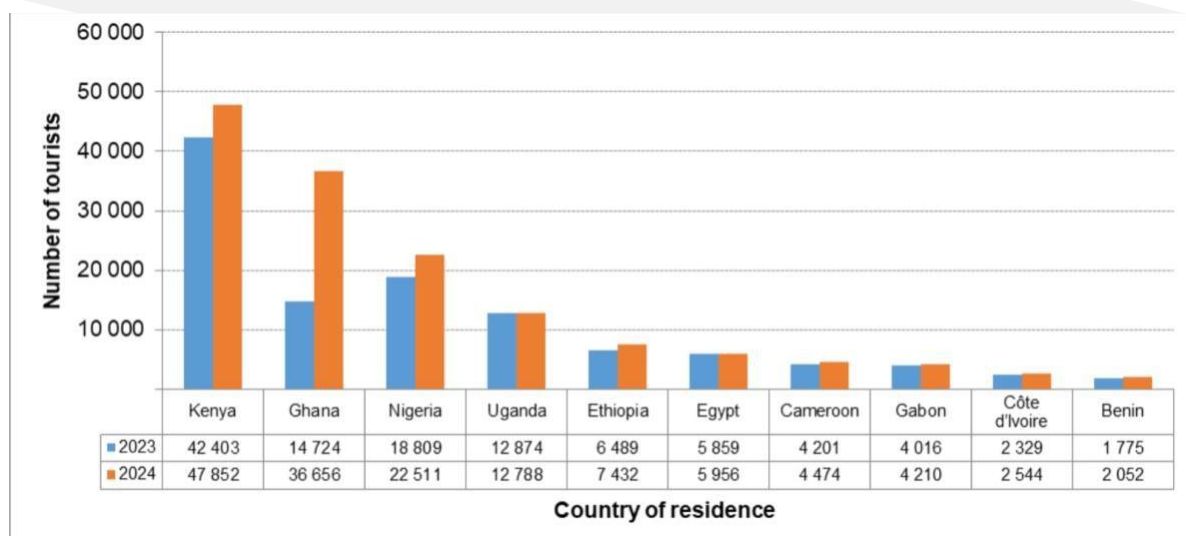


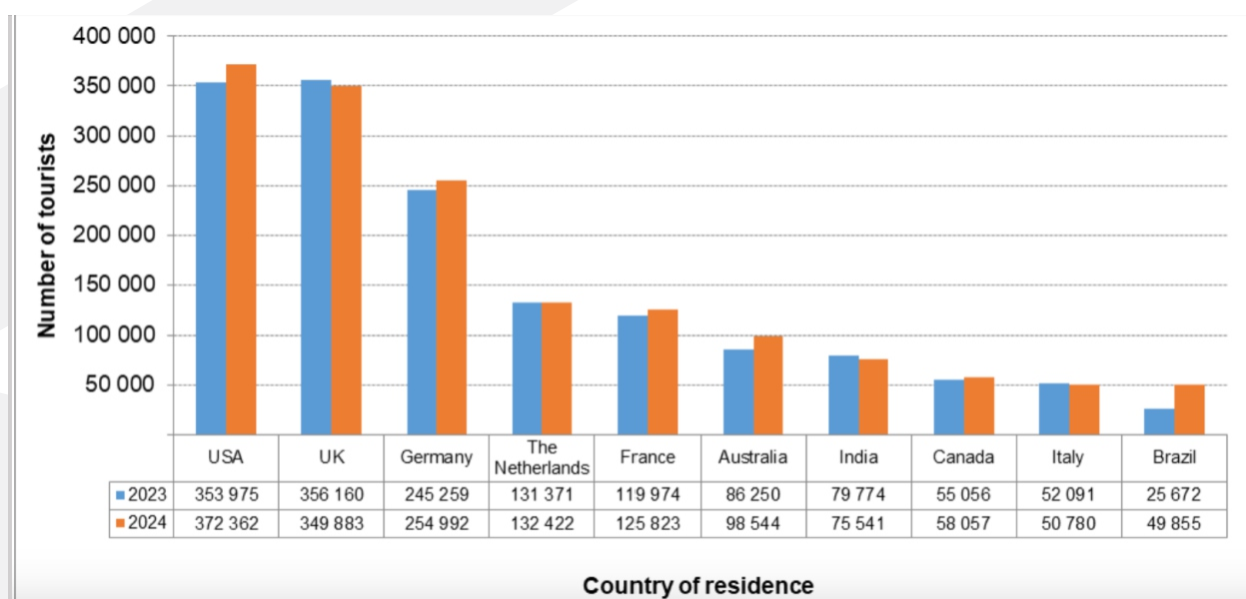
Figure 25: Top 10 Other Africa

Notably, arrivals from Ghana surged by 207% (38,521 visitors) after the November 2023 visa waiver, supported by targeted marketing from South African Tourism. Kenya also saw a significant increase in arrivals.

Top non-African Source Markets

Stats SA data indicate that the top ten source countries for overseas tourists in 2024 are: United States of America (USA) with 372,362 tourists (17.4%), United Kingdom (UK) with 349,883 tourists (16.4%), Germany with 254,992 tourists (11.9%), Netherlands with 132,422 tourists (6.2%), France with 125,823 tourists (5.9%), Australia with 98,544 tourists (4.6%), India with 75,541 tourists (3.5%), Canada with 58,057 tourists (2.7%), Italy with 50,780 tourists (2.4%), and Brazil with 49,855 tourists (2.3%).

Figure 26: Top non-African Source Markets

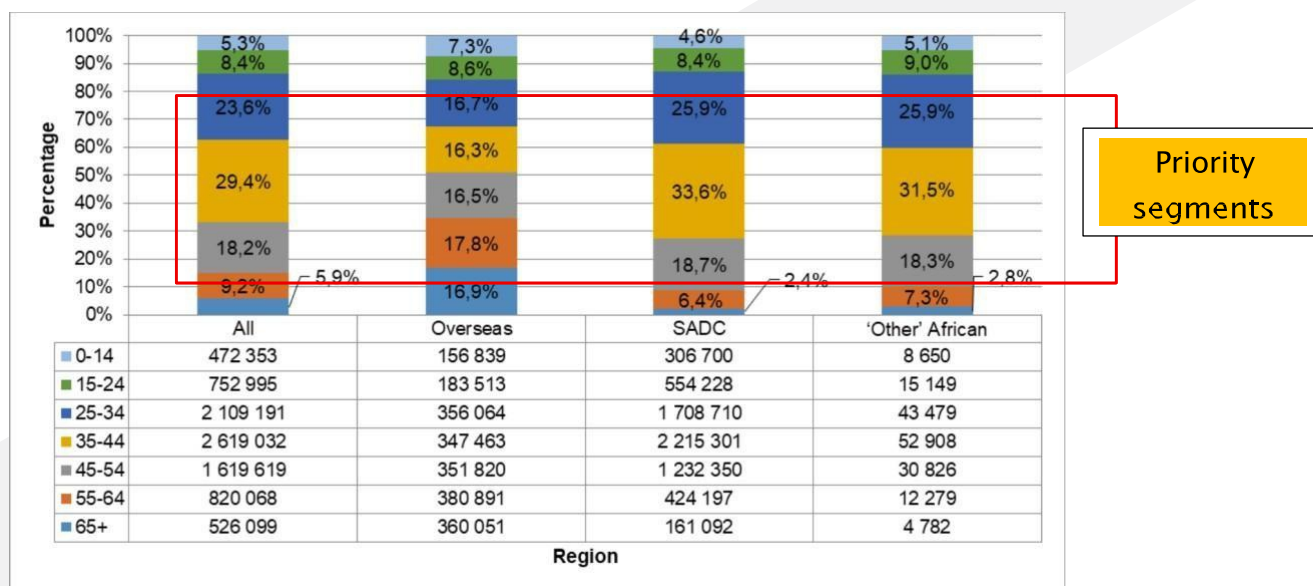


Tourist numbers rose in seven of the ten leading overseas countries from 2023 to 2024. Brazil saw the largest increase at 94.2%.

Demographics - Age distribution

The figure below illustrates the age distribution of tourists. Among all tourists, 472,353 (5.3%) were under 15 years old, 752,995 (8.4%) were aged 15 to 24, 2,109,191 (23.6%) were aged 25 to 34, 2,619,032 (29.4%) were aged 35 to 44, 1,619,619 (18.2%) were aged 45 to 54, 820,068 (9.2%) were aged 55 to 64, and 526,099 (5.9%) were 65 years and older. Tourists with unspecified ages were excluded from the analysis. The 35 to 44 age group represented the largest proportion of tourists from Southern African Development Community (SADC) countries (2,215,301 or 33.6%) and from other African countries (52,908 or 31.5%).

Figure 27: Age



The largest proportion of tourists from overseas countries (380,891 or 17.8%) was in the 55 to 64 age group. For both SADC (1,708,710 or 25.9%) and other African countries (43,479 or 25.9%), the second-largest age group was 25 to 34. Additionally, 360,051 (16.9%) of overseas tourists were aged 65 and older. The median age was 45 for overseas tourists and 38 for both SADC and other African tourists. Notably, 7.3% (156,839) of overseas tourists were under 15 years old, compared to 5.1% (8,650) from other African countries and 4.6% (306,700) from SADC countries.

The economic value of regional markets

2024 data from South African Tourism's annual report show that tourists from Africa and Europe make up 90.1% of visitors to South Africa. However, their spending patterns differ. African tourists account for 76.1% of arrivals but only 45.9% of total expenditure. European tourists represent 14.0% of arrivals but account for 30.6% of total spending.

Figure 28: Value

Spend by Region	FY2023/24	FY2024/25	FY2024/25 % Growth	FY2024/25 % Share
Africa	R43 929 093 202	R42 550 997 684	-3.1%	45.9%
Africa Land	R38 798 855 009	R36 638 371 100	-5.6%	39.5%
Africa Air	R5 130 238 193	R5 912 626 584	15.3%	6.4%
Europe	R31 255 431 720	R28 377 392 343	-9.2%	30.6%
Americas	R12 216 528 893	R14 367 921 849	17.6%	15.5%
Asia	R3 955 364 599	R3 847 071 644	-2.7%	4.1%
Australasia	R2 549 450 332	R2 524 181 734	-1.0%	2.7%
Middle East	R1 237 302 627	R1 122 858 097	-9.2%	1.2 %
Total	R95 143 171 374	R92 790 423 352	-2.5%	100%

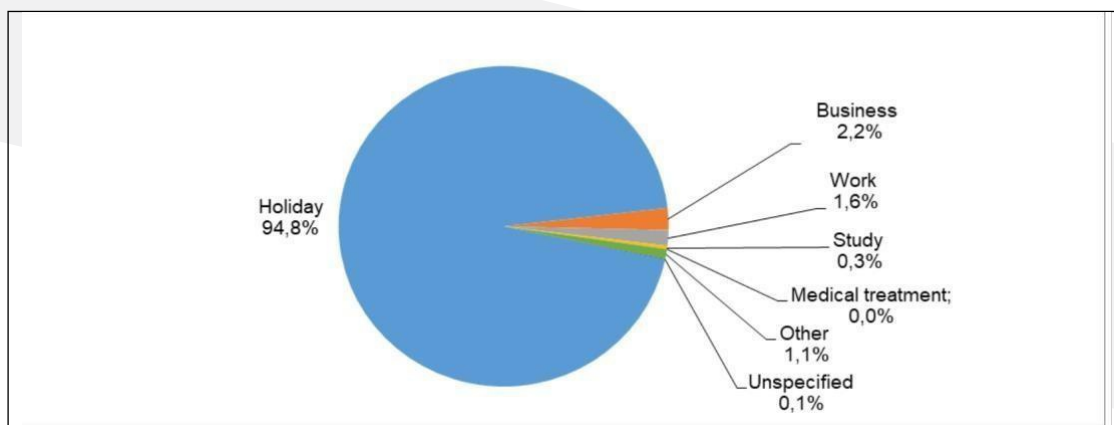
Source: South African Tourism Departure Survey FY2024/25

High consideration for LTA core digital marketing efforts and resource

Purpose and Motivation of Travel

According to the data from Stats SA shown below, leisure travel accounted for 94.8% of foreign arrivals in 2024. Business-related visits made up 2.2%, while 1.6% of arrivals were for employment opportunities.

Figure 29: Purpose



10.5 Recommended Source Markets

According to data from South African Tourism and Statistics South Africa, all regions listed in the table below demonstrated growth relative to the previous fiscal year. Drawing on SAT insights and analysis, the following prioritisation of geographic source markets is recommended for Limpopo:

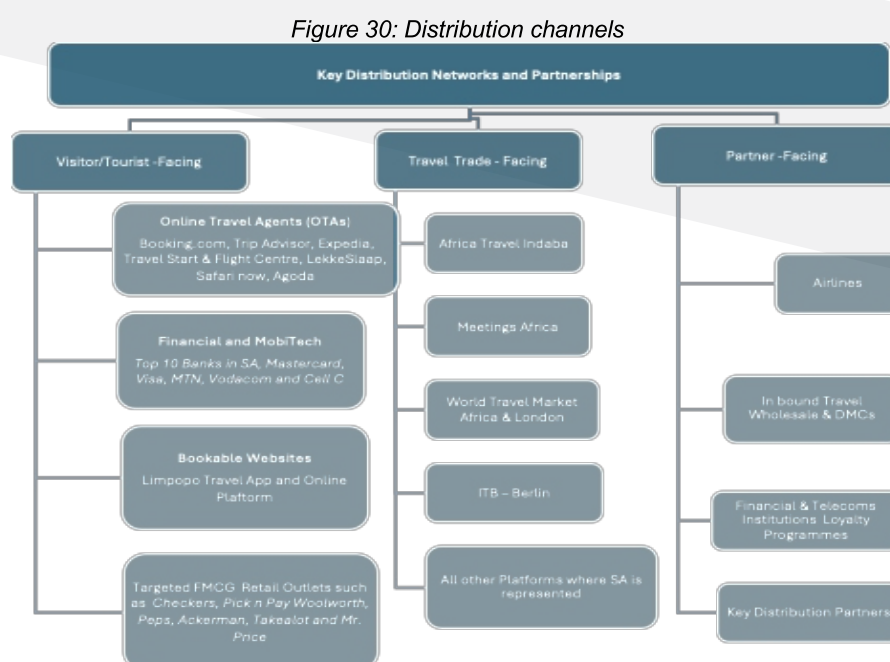
Table 6: Recommended Source Markets

Priority	Source	Travel Motivation and Purpose
1	Domestic – Limpopo Province	VFR, Business, Leisure & Lifestyle, Shopping, Special Events, Political Gatherings, Education & Sports & MICE
2	Domestic – South Africa	VFR, Business, Leisure & Lifestyle, Shopping, Special Events, Political Gatherings, Education & Sports & MICE
3	SADC -African (Land)	VFR, Business, Leisure & Lifestyle, Shopping, Special Events, Education & Sports & MICE
4	Rest of Africa Key Markets (Africa – Air)	Business, Nature, Wildlife & MICE
5	UK, Germany, USA and Canada the Netherlands, France, Italy, Australasia & Middle East	Seasonality, Wildlife, Hunting and Safari

10.6 Distribution Channels

Distribution partners, channels, and networks significantly influence traveller choices and behaviours. LTA should use both direct channels, such as its website, social media, and mobile apps, and indirect channels, including Online Travel Agents, Retail Travel Agents (RTAs), and tour operators, to promote and sell its provincial products and experiences. Forming strategic partnerships with global distribution systems, B2B networks at all levels, and local visitor centres is essential to maximise market reach and conversion rates.

Innovative networks should also incorporate non-traditional channels such as leading retail brands and e-commerce platforms to expand the organisation's reach. It is recommended that as far as possible, Limpopo aim to develop relationships with and integrate into, amongst others, the following distribution networks proposed in the chart below.



10.7 Destination Brand Management and Marketing

The Integrated Marketing and Communication Plan should aim to refresh and reposition the Limpopo brand (Go Limpopo) to create a more compelling, sustainable, and distinct value proposition for the province. Limpopo's tourism brand management team should refresh the brand to strengthen its distinctiveness, attract visitors, foster emotional connections, and ensure long-term competitiveness. This means aligning stakeholder interests with visitor experiences and delivering consistent messaging across all channels. A primary consideration in the brand refresh and repositioning process is the establishment of a consistent and cohesive visual identity, encompassing the logo, colour palette, and typography.

To further strengthen brand reach and authenticity, the province should embrace an **open-source destination marketing approach** that enables tourism industry partners to actively collaborate with the Limpopo Tourism Agency (LTA) in promoting the destination. Through shared digital platforms, content libraries, storytelling tools and co-marketing initiatives, tourism operators, guides, community enterprises and event organisers can contribute high- quality images, videos, itineraries and visitor stories that reflect the diversity of Limpopo's tourism experiences. This collaborative model expands the province's marketing footprint, encourages industry ownership of the brand, and allows the destination narrative to evolve organically through real visitor experiences. By enabling structured industry participation while maintaining clear brand guidelines, LTA can leverage collective creativity and reach, making the **Go Limpopo** brand more dynamic, authentic and competitive in the digital tourism marketplace.

10.8 Integrated Marketing Communication

It is essential to build strong internal support and ensure effective external communication. The brand's personality, messaging, and values must be applied consistently across all touchpoints. The proposed Integrated Marketing Communications mix includes Above-the- Line (ATL), Below-the-Line (BTL), Through-the-Line (TTL), and digital channels, as shown in the accompanying figure. Limpopo's integrated marketing communications (IMC) strategy should prioritize digital marketing by enhancing its online presence. This approach involves updating the destination marketing website, developing engaging content, and utilizing social media platforms to attract visitors and foster community engagement. Key tactics comprise visually compelling Instagram content, targeted digital advertising, mobile applications, multimedia initiatives, effective pay-per-click campaigns, and a community-cantered approach to placemaking.

To further strengthen brand reach and authenticity, the province should embrace an open-source destination marketing approach that enables tourism industry partners to actively collaborate with the Limpopo Tourism Agency (LTA) in promoting the destination. Through shared digital platforms, content libraries, storytelling tools and co-marketing initiatives, tourism operators, guides, community enterprises and event organisers can contribute high- quality images, videos, itineraries and visitor stories that reflect the diversity of Limpopo's tourism experiences. This collaborative model expands the province's marketing footprint, encourages industry ownership of the brand, and allows the destination narrative to evolve organically through real visitor experiences. By enabling structured industry participation while maintaining clear brand guidelines, LTA can leverage collective creativity and reach, making the Go Limpopo brand more dynamic, authentic and competitive in the digital tourism marketplace.



10.9 Conclusion

The Marketing and Branding Framework provides a clear direction for stimulating both domestic and international demand and strengthening the province's position in an increasingly competitive tourism landscape. Grounded in the situational analysis and aligned with the overarching objectives of the Limpopo Tourism Growth Strategy (LTGS), the Framework translates global trends, domestic market dynamics, and provincial priorities into a structured approach that supports resilient and sustainable tourism growth.

The recommended segmentation approach, aligned with South African Tourism's prioritisation model, ensures that marketing investments are targeted, evidence-based, and capable of generating meaningful returns. This alignment also enhances economies of scale and strengthens Limpopo's integration into national and regional tourism promotion platforms. The Framework's goals and objectives further reinforce the LTGS's commitment to competitiveness, inclusivity, and long-term growth.

Overall, the Marketing and Branding Framework offers a comprehensive, integrated, and strategically aligned roadmap for enhancing Limpopo's visibility, competitiveness, and market performance.

11. Stakeholder Engagement and Partnership Framework

11.1 Introduction

Effective implementation of the Limpopo Tourism Growth Strategy requires more than a strong marketing framework; it depends on a coordinated stakeholder engagement and partnership approach that mobilises all actors across government, industry, communities, conservation and the creative economy. This strategy outlines how LEDET will build and sustain the relationships, alignment and collaboration needed to drive inclusive and sustainable tourism growth.

11.2 Engagement Objectives

The engagement process aims to strengthen alignment between tourism and conservation, improve coordination across government spheres, mobilise investment, enhance community participation, integrate the creative economy, and support evidence-based decision-making.

11.3 Engagement Principles

Engagement will be guided by whole-of-government coordination, inclusivity, sustainability, evidence-based planning, transparency and partnership-driven implementation.

11.4 Pillars

11.4.1 Intergovernmental Coordination

Align LTGS priorities with the LDP, DDM, municipal IDPs and conservation plans. This includes establishing a provincial steering committee, holding quarterly IGR forums and coordinating planning with national departments and agencies.

11.4.2 Conservation–Tourism Integration

Strengthen collaboration between conservation authorities and tourism planners to ensure protected areas drive tourism growth while maintaining ecological integrity. Key actions include co-management forums, joint product development and biodiversity-sensitive tourism guidelines.

11.4.3 Industry Partnerships and Investment

Enhance competitiveness and investment readiness through structured engagement with industry bodies, annual investment conferences, sector roundtables and public-private partnerships for priority nodes and routes.

11.4.4 Community and Traditional Leadership Engagement

Promote inclusive growth by engaging traditional leaders, supporting community-based tourism enterprises and integrating cultural heritage into tourism development.

11.4.5 Creative Economy Integration

Position culture and creativity as core tourism assets through partnerships with creative hubs, development of cultural routes and festivals, and market access platforms for creatives.



11.4.6 Research, Data and Knowledge Partnerships

Strengthen evidence-based planning through a Tourism Knowledge Hub, annual research agendas, visitor surveys and monitoring dashboards aligned to LTGS indicators.

11.4.7 Communication and Stakeholder Mobilisation.

Build shared ownership of the LTGS through provincial communication campaigns, regular updates, district roadshows and digital engagement platforms.

It is recommended that implementation coordination structures be established through a Provincial Partnership Growth Committee and that an annual provincial tourism conference takes place to discuss how the tourism growth strategy is being mobilized.

12. Key Issues and Priorities

The following is a table of the key issues, implications and strategic priorities that have emerged from this study and how they link to the strategic objectives outlined in Section 13.

Table 15: Key Issues and Priorities

Key Issue	Implication for Tourism Growth	Strategic Priority (Response)	Linked Strategic Objective(s)
Weak governance, coordination and implementation	Fragmented delivery, weak accountability and risk of non-implementation.	Establish a strengthened governance framework, clear institutional roles, and a results-based M&E system.	Strategic Goal 7: Strengthen Governance, Coordination and Implementation
Infrastructure constraints and limited accessibility	Reduced accessibility, higher travel costs and weakened visitor experience.	Prioritise investment in roads, signage, airports and climate-resilient infrastructure aligned to key nodes and routes.	Strategic Goal 5: Improve Access, Infrastructure and Connectivity in Limpopo Province
Weak destination positioning and fragmented marketing	Limited visibility, weak brand identity and reduced competitiveness.	Develop a unified destination brand, strengthen digital marketing and improve trade engagement and conversion.	Strategic Goal 1: Strengthen Destination Positioning of Limpopo Province
Product gaps and uneven cluster development	Reduced visitor spend, short stays and weak competitiveness.	Strengthen cluster-based development, improve product quality and develop experience-led tourism offerings.	Strategic Goal 3: Enhance Tourism Products, Clusters and Routes in Limpopo Province
Weak route development and spatial integration	Limited dispersal and reduced local economic impact.	Establish a Provincial Route Development Programme and integrate GIS-based planning.	Strategic Goal 3: Enhance Tourism Products, Clusters and Routes in Limpopo Province
Underdeveloped high-value tourism segments (MICE, wellness, adventure, special interest)	Missed high-yield opportunities and limited off-peak demand.	Develop high-value segments, including a Convention Bureau and structured events and niche tourism offerings.	Strategic Goal 2: Drive Inclusive Economic Growth and Employment through Tourism in Limpopo Province Strategic Goal 3: Enhance Tourism Products, Clusters and Routes in Limpopo Province
Underutilisation of domestic and regional tourism markets	Lost opportunities for growth and demand resilience.	Develop targeted domestic and SADC tourism strategies, including self-drive routes and cross-border packages.	Strategic Goal 1: Strengthen Destination Positioning of Limpopo Province Strategic Goal 2: Drive Inclusive Economic Growth and Employment through Tourism in Limpopo Province

Key Issue	Implication for Tourism Growth	Strategic Priority (Response)	Linked Strategic Objective(s)
Limited SMME participation and community inclusion	Weak local economic impact and limited transformation.	Expand enterprise development, integrate SMMEs into tourism value chains and support community-based tourism.	Strategic Goal 2: Drive Inclusive Economic Growth and Employment through Tourism in Limpopo Province
Institutional capacity and resource constraints	Reduced implementation capability.	Strengthen programme management capacity (PMOs), skills development and institutional resourcing.	Strategic Goal 7: Strengthen Governance, Coordination and Implementation
Weak integration with broader economic sectors	Limited multiplier effects and missed investment opportunities.	Strengthen cross-sector integration (agritourism, creative economy, mining and agriculture partnerships).	Strategic Goal 2: Drive Inclusive Economic Growth and Employment through Tourism in Limpopo Province Strategic Goal 8: Attract Investment and Unlock Tourism Opportunities in Limpopo Province
Limited digital systems, data and market intelligence	Weak marketing efficiency and poor conversion.	Develop integrated digital platforms, strengthen data systems and improve market intelligence.	Strategic Goal 1: Strengthen Destination Positioning of Limpopo Province Strategic Goal 7: Strengthen Governance, Coordination and Implementation
Climate risk and environmental vulnerability	Threats to infrastructure, assets and sustainability.	Integrate climate resilience, conservation and resource efficiency into tourism planning.	Strategic Goal 4: Advance Sustainable, Climate-Resilient and Conservation-Led Tourism in Limpopo Province
Weak safety perception and destination readiness	Reduced visitor confidence and competitiveness.	Strengthen tourism safety programmes, service standards and visitor experience management.	Strategic Goal 5: Improve Access, Infrastructure and Connectivity in Limpopo Province Strategic Goal 1: Strengthen Destination Positioning of Limpopo Province
Fragmented stakeholder engagement and communication	Weak alignment and reduced implementation effectiveness.	Develop a structured stakeholder engagement and communication framework.	Strategic Goal 7: Strengthen Governance, Coordination and Implementation

13. Strategy

The strategic direction of the 2026–2030 Limpopo Tourism Growth Strategy is intentionally anchored in the foundations laid by the 2018 Tourism Growth Strategy, which, despite not being fully implemented, remains conceptually sound and aligned with the province's long-term tourism ambitions. The core intent, developmental logic, and transformation agenda articulated in 2018 continue to hold relevance, particularly the emphasis on nature-based, cultural, and heritage-driven competitiveness. As such, the new strategy builds on this earlier framework, refining rather than reinventing its vision, mission, and guiding principles to ensure continuity, coherence, and renewed focus on delivery, coordination, and measurable impact.

13.1 Vision

The Tourism Growth Strategy is guided by a clear and enduring vision: *a rapidly and inclusively growing tourism economy that leverages Limpopo's competitive advantages in nature, culture, and heritage, supported by innovative products and service excellence*. This vision reflects continuity with previous planning frameworks while reaffirming Limpopo's long-term ambition to position tourism as a key driver of sustainable economic development.

13.2 Mission

The mission of the strategy is to increase tourism's direct contribution to the provincial economy through collaborative planning and the focused implementation of agreed priority actions within clearly defined and consolidated tourism clusters. Emphasis is placed on coordination, prioritisation, and delivery to ensure that tourism growth is structured, market-responsive, and economically impactful.

13.3 Core Values

Tourism development in Limpopo is underpinned by a shared set of core values that define the province's approach to tourism growth. Central to these is authenticity and sense of place, ensuring that tourism experiences are grounded in Limpopo's landscapes, cultures, heritage, and living traditions. Tourism growth is explicitly people-centred, recognising local communities as custodians and beneficiaries of tourism development, with a focus on improved livelihoods, dignity, and long-term socio-economic benefit.

Environmental stewardship is recognised as fundamental, acknowledging that biodiversity, wildlife, and ecosystems form the foundation of Limpopo's tourism offering. This is reinforced by a strong commitment to inclusivity and transformation, supporting broad-based participation across the tourism value chain, particularly among SMMEs, youth, women, rural enterprises, and historically marginalised communities. The strategy further promotes excellence and professionalism, innovation and adaptability, and partnership and collaboration across government, the private sector, communities, conservation authorities, and traditional leadership structures. These values are operationalised through a set of guiding principles that shape how tourism is planned, implemented, and managed.

13.4 Guiding Principles

Tourism growth is structured around a cluster-led and route-based development approach, enabling coordinated planning, focused investment, and coherent product development. Product development is market-responsive, informed by visitor demand and priority source markets, while local value-chain integration seeks to maximise local retention of tourism expenditure.

The strategy promotes conservation-led tourism growth, ensuring alignment with biodiversity protection, responsible land use, and protected area management, alongside community benefit and participation as a core requirement. Investment is spatially targeted to priority tourism nodes, corridors, and high-potential areas, supported by capacity building and skills development across guiding, hospitality, enterprise management, and destination management. Sustainability and climate resilience considerations are embedded throughout, supported by integrated governance, alignment with planning frameworks, and a commitment to monitoring, review, and adaptive implementation over the 2026–2030 period.

13.5 Strategic Goals

The Strategic Goals of the 2026–2030 Limpopo Tourism Growth Strategy provide a coherent framework for repositioning the province's tourism sector for accelerated inclusive and sustainable growth. These goals respond to the province's competitive strengths, structural constraints and emerging opportunities identified through the strategy review. The goals collectively focus on strengthening Limpopo's destination brand, expanding inclusive economic participation, enhancing product and route competitiveness, embedding sustainability and climate resilience, improving infrastructure and connectivity, building a skilled and professional workforce, strengthening governance and partnerships, and unlocking investment. Aligned with the cross-cutting strategic imperatives, these goals establish a clear, integrated approach for transforming Limpopo into a future-ready tourism destination that delivers meaningful economic impact and long-term resilience.

Strategic Goal 1: Strengthen Destination Positioning of Limpopo Province

Position Limpopo Province as a distinctive, competitive and future-ready tourism destination in priority domestic, regional and international markets, anchored in its unique combination of wildlife, landscapes, cultural heritage and living traditions.

This goal seeks to strengthen visibility, demand and market share through a unified, insight-driven marketing approach, leveraging digital platforms, strategic partnerships and targeted campaigns, while establishing a strong and consistent destination brand.

Strategic Goal 2: Drive Inclusive Economic Growth and Employment through Tourism in Limpopo Province

Drive inclusive, geographically distributed tourism growth, expanding employment, enterprise

development and participation by SMMEs, youth, women and community-based enterprises. This goal focuses on strengthening tourism value chains, increasing visitor dispersal and length of stay, and integrating emerging enterprises into formal tourism markets.

Strategic Goal 3: Enhance Tourism Products, Clusters and Routes in Limpopo Province

Strengthen competitiveness through cluster-led tourism development, integrated route development and the packaging of market-ready, experience-based tourism offerings aligned to Limpopo's natural, cultural and heritage assets.

This goal aims to improve product coherence, support destination differentiation and align tourism offerings to evolving market demand.

Strategic Goal 4: Advance Sustainable, Responsible, Climate-Resilient and Conservation-Led Tourism in Limpopo Province

Future-proof the tourism economy by embedding sustainability, climate resilience and conservation-led development across tourism planning and operations.

This goal responds to environmental pressures and climate risks and promotes responsible tourism, ecosystem protection and climate adaptation.

Strategic Goal 5: Improve Access, Infrastructure and Connectivity in Limpopo Province

Enhance competitiveness by improving physical and digital infrastructure, access and connectivity across priority tourism nodes, routes and corridors.

This includes road infrastructure, signage, air connectivity, public facilities, and the development of smart tourism systems.

Strategic Goal 6: Build Skills, Capacity, Visitor Experience and Professional Standards in Limpopo Province

Develop a skilled, professional and future-ready tourism workforce aligned to industry needs and international standards.

This goal focuses on improving service quality, strengthening enterprise development and enhancing the overall visitor experience.

Strategic Goal 7: Strengthen Governance, Partnerships and Delivery in Limpopo Province

Institutionalise coordinated, accountable and performance-driven tourism governance, strengthening collaboration between government, industry and communities. This includes improved coordination, monitoring and evaluation, and implementation capacity.

Strategic Goal 8: Attract Investment and Unlock Tourism Opportunities in Limpopo Province

Position tourism as a priority investment sector by identifying, packaging and promoting catalytic projects, investment nodes and development opportunities. This includes strengthening public-private partnerships, improving investment readiness and establishing mechanisms such as a Provincial Convention Bureau.

Alignment with Strategic Imperatives

The Strategic Goals are supported and enabled by the seven cross-cutting strategic imperatives identified through the SWOT analysis. These imperatives represent priority areas of intervention that must be addressed across all goals to ensure effective implementation and long-term sustainability.

The relationship between the Strategic Goals and Strategic Imperatives is illustrated below:

Table 16: Relationship between the strategic goals and strategic objectives

Strategic Imperative	Primary Strategic Goals Supported
1. Cluster-Based Product Diversification and Market Positioning	1, 2, 3, 8
2. Integrated Infrastructure and Climate-Resilient Planning	4, 5
3. Digital Transformation and Smart Tourism Systems	1, 3, 5
4. Capacity Building and Community-Based Tourism Development	2, 6
5. Sustainable Tourism and Climate Risk Mitigation	4
6. Governance, Coordination and Performance Monitoring	7
7. Investment Promotion and Market Development	1, 3, 8

13.6 Interventions and Enablers

The successful implementation of the Limpopo Tourism Growth Strategy 2026–2030 depends on a set of clearly defined strategic enablers that cut across all interventions and require active, coordinated action from multiple stakeholders. While LEDET provides overall leadership and strategic direction, the delivery of many interventions relies on the commitment, resource allocation and performance of other provincial departments, municipalities, public entities, conservation authorities and national agencies. It is therefore imperative that LEDET not only secures broad stakeholder buy-in, but also formalises strong, actionable commitments to ensure that each partner delivers on the components of the strategy within their mandate. Without this collective responsiveness and shared accountability, the province will not achieve the strategic goals outlined above nor unlock the full economic, social and environmental value of tourism for Limpopo.

Strategic Goal 1: Strengthen Destination Positioning of Limpopo Province

1. Define and develop a clear destination positioning strategy and architecture anchored in Limpopo's competitive advantages

Establish a clear and differentiated destination identity that reflects Limpopo Province's unique combination of wildlife, landscapes, cultural heritage and living traditions.

2. Implement a unified, insight-driven destination marketing programme, including crisis communication and destination reputation management

Strengthen demand through targeted campaigns, digital platforms and data-informed marketing in priority domestic, regional and international markets, while establishing communication protocols to protect and strengthen the destination's reputation during disruptions or adverse events.

3. Strengthen trade engagement and partnerships to improve conversion and market access

Enhance collaboration with the travel trade, tour operators and distribution channels to improve market access and conversion.

Strategic Goal 2: Drive Inclusive Economic Growth and Employment through Tourism in Limpopo Province

4. Implement cluster-based tourism development (including MICE) to support inclusive growth

Apply a structured cluster approach to tourism development, including business events and incentive tourism as a focused growth area.

5. Support SMME integration into tourism value chains and local supply chains

Promote inclusive participation through enterprise development, procurement and targeted support for emerging businesses, including youth, women and community enterprises.

6. Develop and strengthen tourism corridors, routes and destinations to increase geographic spread and length of stay

Encourage visitor dispersal beyond established tourism nodes through the development of routes, corridors and linked destinations.

Strategic Goal 3: Enhance Tourism Products, Clusters and Routes in Limpopo Province

7. Strengthen cluster performance and market positioning aligned to priority segments

Define, prioritise and implement cluster-based development frameworks aligned to Limpopo's competitive advantages.

8. Develop and strengthen priority tourism routes and corridors to improve visitor dispersal

Establish and promote marketable routes that connect key attractions and experiences, including heritage, nature, cultural and special-interest routes.

9. Develop, package and promote market-ready tourism experiences and itineraries

Strengthen product development and packaging to improve the quality, diversity and market readiness of tourism offerings.

10. Develop and implement digital platforms and systems for tourism marketing, booking and visitor information

Improve access to information and services through integrated digital platforms that support planning, booking and visitor navigation.

Strategic Goal 4: Advance Sustainable, Responsible, Climate-Resilient and Conservation-Led Tourism in Limpopo Province

11. Strengthen biodiversity conservation and conservation-linked tourism development

Align tourism development with conservation priorities, protected areas and responsible land-use practices.

12. Implement resource efficiency and cleaner production (RECP) programmes across the tourism sector

Support the adoption of energy, water and waste efficiency measures across tourism enterprises.

13. Embed comprehensive climate resilience and all hazards risk management into tourism planning, infrastructure development and destination management systems

Develop and implement a Tourism Disaster Risk and Resilience Protocol (TDRRP) that integrates climate risk assessments, all hazards contingency planning, and standard operating procedures for preparedness, early warning, communications, response and recovery across all tourism nodes and facilities.

Strategic Goal 5: Improve Access and Infrastructure in Limpopo Province

14. Plan and coordinate tourism-supporting infrastructure development in priority nodes and routes

Align infrastructure planning and investment with tourism demand and spatial priorities.

15. Improve road access, signage and wayfinding to key tourism nodes and routes

Enhance accessibility, safety and visitor navigation through targeted improvements.

16. Strengthen air, road, rail and other modes of access and regional connectivity to support tourism growth.

17. Improve digital infrastructure and visitor information systems across the province

Enhance connectivity, digital platforms and smart tourism solutions to support visitor experience and destination management.

Strategic Goal 6: Build Skills, Capacity, Visitor Experience and Professional Standards in Limpopo Province

18. Implement tourism skills development and training programmes aligned to industry needs

Strengthen the skills base through targeted training, education and work-integrated learning opportunities.

19. Support SMME and enterprise development programmes to improve sustainability and growth

Promote business development through mentorship, incubation, access to finance and market linkages.

20. Strengthen quality assurance, grading and accreditation across the tourism sector. Improve service quality, compliance and visitor satisfaction through standards and accreditation systems.

Strategic Goal 7: Strengthen Governance, Partnerships and Delivery in Limpopo Province

21. Align tourism priorities with municipal IDPs, SDFs and provincial planning frameworks

Ensure that tourism is integrated into spatial and economic planning instruments to support coordinated development and investment.

22. Establish and strengthen governance and coordination structures across the tourism system

Strengthen institutional coordination, cluster governance and stakeholder collaboration across provincial, district and local levels.

23. Implement monitoring, reporting and performance management systems for the strategy

Develop data-driven monitoring systems, dashboards and reporting mechanisms to track implementation and performance.

24. Strengthen institutional capacity and programme management for tourism delivery

Build organisational capacity, including programme management offices (PMOs), to support effective implementation and delivery of the strategy.

Strategic Goal 8: Attract Investment and Unlock Tourism Opportunities in Limpopo Province

25. Facilitate tourism investment and investor engagement in priority nodes and routes



Proactively engage investors, promote opportunities and strengthen investment facilitation mechanisms.

26. Develop and package bankable tourism projects and a prioritised investment pipeline

Identify, prepare and package investment-ready projects aligned to priority clusters, routes and destinations.

27. Promote and facilitate public–private partnerships for tourism development

Strengthen PPP frameworks and partnerships to unlock infrastructure, product development and destination investment.

28. Unlock the Tourism Potential of LEDET-Managed Provincial Parks

Implement structured commercialisation programmes for provincial parks; enabling community-owned enterprises, SMMEs, and responsible private operators to develop tourism products, services, and concessions that stimulate local economies.

The table below illustrates the alignment between the Strategic Goals, key interventions and the Implementation Plan, ensuring clear traceability between strategic priorities and delivery mechanisms:

Table 17: LTGS Strategic Goals, Interventions and Enablers

Strategic Goal (Limpopo Province)	Priority Strategic Intervention	Primary Enablers
1. Strengthen Destination Positioning of Limpopo Province	1. Define and develop a clear destination positioning strategy and architecture anchored in Limpopo's competitive advantages	Governance; Partnerships; Data intelligence
	2. Implement a unified, insight-driven destination marketing programme	Digital systems; Funding; Partnerships
	3. Strengthen trade engagement and partnerships to improve conversion and market access	Partnerships; Industry collaboration
2. Drive Inclusive Economic Growth and Employment through Tourism in Limpopo Province	4. Implement cluster-based tourism development (including MICE) to support inclusive growth	Governance; Investment; Partnerships
	5. Support SMME integration into tourism value chains and local supply chains	Skills development; Finance; Market access
	6. Develop and promote route-based and experience-led tourism to increase geographic spread and length of stay	Infrastructure; Spatial planning; Partnerships
3. Enhance Tourism Products, Clusters and Routes in Limpopo Province	7. Strengthen cluster performance and market positioning aligned to priority segments	Governance; Investment facilitation
	8. Develop and strengthen priority tourism routes and corridors to improve visitor dispersal	GIS systems; Infrastructure; Marketing
	9. Develop, package and promote market-ready tourism experiences and itineraries	Skills; Quality standards; Market intelligence
	10. Develop and implement digital platforms and systems for tourism marketing, booking and visitor information	Digital systems; Data platforms
4. Advance Sustainable, Responsible, Climate Resilient and Conservation-Led Tourism in Limpopo Province	11. Strengthen biodiversity conservation and conservation-linked tourism development	Governance; Partnerships; Environmental compliance
	12. Implement resource efficiency and cleaner production (RECP) programmes across the tourism sector	Incentives; Funding; Technical support
	13. Embed comprehensive climate resilience and all hazards risk management into tourism planning, infrastructure development and destination management systems	Data systems; Disaster management; Partnerships
5. Improve Access, Infrastructure and in Limpopo Province	14. Plan and coordinate tourism-supporting infrastructure development in priority nodes and routes	Funding; Planning; Intergovernmental coordination
	15. Improve road access, signage and wayfinding to key tourism nodes and routes	Transport partnerships; Funding
	16. Strengthen air access and regional connectivity to support tourism growth	National partnerships; Investment
	17. Improve digital infrastructure and visitor information systems across the province	ICT investment; Skills development
6. Build Skills, Capacity, Visitor Experience and Professional Standards in Limpopo Province	18. Implement tourism skills development and training programmes aligned to industry needs	Training institutions; Funding; Partnerships
	19. Support SMME and enterprise development programmes to improve sustainability, growth and resilience	Finance; Mentorship; Market access
	20. Strengthen quality assurance, grading and accreditation across the tourism sector	Accreditation systems; Monitoring
7. Strengthen Governance, Partnerships and Delivery in Limpopo Province	21. Align tourism priorities with municipal IDPs, SDFs and provincial planning frameworks	Governance structures; Data systems; Institutional capacity
	22. Establish and strengthen governance and coordination structures across the tourism system	Governance structures; Partnerships
	23. Implement monitoring, reporting and performance management systems for the strategy	Data systems; Institutional capacity
	24. Strengthen institutional capacity and programme management for tourism delivery	Skills; Governance; Funding
8. Attract Investment and Unlock Tourism Opportunities in Limpopo Province	25. Facilitate tourism investment and investor engagement in priority nodes and routes	Investment facilitation; Funding; Partnerships
	26. Develop and package bankable tourism projects and a prioritised investment pipeline	Investment facilitation; Project preparation; Funding
	27. Promote and facilitate public-private partnerships for tourism development	PPP frameworks; Investment; Partnerships
	28. Unlock the Tourism Potential of LEDET-Managed Provincial Parks	Commercialisation programme implemented

14. Strategic Implementation

14.1 Implementation Plan

Timeframes: Short term (0–12 months) | Medium term (1–3 years) | Long term (3–5 years)

Table 18: Implementation Plan

Ref.	Strategic Goals (Limpopo Province)	Priority Strategic Interventions (Key Result Area)	Timeframe	Aligned Key Performance Indicators (SAT & NDT Framework)	Lead / Co-Lead	Key Partners
11.1.1	Strengthen Destination Positioning of Limpopo Province	1. Define and develop a clear destination positioning strategy and architecture anchored in Limpopo's competitive advantages.	Short	Destination positioning architecture Brand awareness; Net Promoter Score; Visitor satisfaction	LTA	LEDET; SAT
		2. Implement a unified, insight-driven destination marketing programme	Short–Medium	Tourist arrivals (domestic, regional, international); tourism spend; occupancy rates, digital reach	LTA	Districts; Industry
		3. Strengthen trade engagement and partnerships to improve conversion and market access	Medium	Conversion rates; trade partnerships; packaged offerings	LTA	Industry
11.1.2	Drive Inclusive Economic Growth and Employment through Tourism in Limpopo Province	4. Implement cluster-based tourism development (including MICE) to support inclusive growth	Short–Medium	Tourism GDP contribution; number of clusters operational	LEDET / LTA	NDT; Municipalities
		5. Support SMME integration into tourism value chains and local supply chains	Short–Medium	Number of SMMEs supported; jobs created; local procurement	LEDET	Industry
		6. Develop and promote route-based and experience-led tourism to increase geographic spread and length of stay.	Medium	Length of stay; bed nights; geographic distribution of visitors	LTA	Districts
11.1.3	Enhance Tourism Products, Clusters and Routes in Limpopo Province	7. Strengthen cluster performance and market positioning aligned to priority segments	Short	Cluster performance; investment pipeline	LEDET	Industry
		8. Develop and strengthen priority tourism routes and corridors to improve visitor dispersal	Medium	Number of routes; geographic spread; dispersal index	LTA	Districts
		9. Develop, package and promote market-ready tourism experiences and itineraries	Medium	Number of packaged experiences; visitor satisfaction; repeat visits	LTA	Industry
		10. Develop and implement digital platforms and systems for tourism marketing, booking and visitor information	Medium	Platform usage; bookings; digital conversion rates	LTA	ICT partners

Limpopo Tourism Growth Strategy & Implementation Plan 2026-2030

11.1.4	Advance Sustainable, Responsible, Climate Resilient and Conservation-Led Tourism in Limpopo Province	11. Strengthen biodiversity conservation and conservation-linked tourism development	Medium	Number of conservation-linked tourism projects	LEDET	DFFE
		12. Implement resource efficiency and cleaner production (RECP) programmes across the tourism sector	Medium–Long	Number of enterprises adopting RECP; reduction in energy/water use	LEDET	NDT
		13. Embed comprehensive climate resilience and all hazards risk management into tourism planning, infrastructure development and destination management systems	Medium–Long	Risk assessments completed; infrastructure resilience indicators	LEDET	Disaster Management
11.1.5	Improve Access, Infrastructure and in Limpopo Province	14. Plan and coordinate tourism-supporting infrastructure development in priority nodes and routes	Short–Medium	Number of tourism projects; occupancy rates; visitor satisfaction	LEDET	Municipalities
		15. Improve road access, signage and wayfinding to key tourism nodes and routes	Medium	Km of roads improved; visitor satisfaction; access index	LDPWRI RAL	RAL
		16. Strengthen air, road, rail and other modes of access and regional connectivity to support tourism growth.	Long	Passenger volumes; number of routes; international arrivals	Province	Airports
		17. Improve digital infrastructure and visitor information systems across the province	Medium	Connectivity index; digital engagement	LEDET	ICT sector LimpopoConnexion LEDA
11.1.6	Build Skills, Capacity, Visitor Experience and Professional Standards in Limpopo Province	18. Implement tourism skills development and training programmes aligned to industry needs	Short–Medium	Number of learners trained; placement rates; employment	LEDET / LTA	CATHSSETA
		19. Support SMME and enterprise development programmes to improve sustainability, growth and resilience.	Medium	Number of enterprises supported; survival rate	LEDET	Municipalities
		20. Strengthen quality assurance, grading and accreditation across the tourism sector	Short–Medium	Number of graded establishments; visitor satisfaction; NPS	LTA	TGCSA
11.1.7	Strengthen Governance, Partnerships and Delivery in Limpopo Province	21. Align tourism priorities with municipal IDPs, SDFs and provincial planning frameworks	Short	Number of IDPs aligned; stakeholder engagements	LEDET	Municipalities
		22. Establish and strengthen governance and coordination structures across the tourism system	Short	Functional committees; coordination meetings	LEDET	LTA
		23. Implement monitoring, reporting and performance management systems for the strategy	Medium	Quarterly reports; dashboard implementation; performance compliance	LEDET	Treasury
		24. Strengthen institutional capacity and programme management for tourism delivery	Medium	PMO established; project delivery rate	LEDET	Industry

11.1.8	Attract Investment and Unlock Tourism Opportunities in Limpopo Province	25. Facilitate tourism investment in priority nodes and routes	Medium	Value of investment secured; number of investors engaged	LEDET	Treasury
		26. Develop /facilitate development, packaging and promotion of bankable tourism projects and a prioritised investment pipeline	Short–Medium	Number of bankable projects; investment pipeline	LEDET / LTA	DFIs
		27. Promote and facilitate public–private partnerships for tourism development	Medium	Number of PPPs; infrastructure investment value	LEDET	Private sector
		28. Unlock the Tourism Potential of LEDET-Managed Provincial Parks	Medium	Commercialisation programme developed and implemented	LEDET	Treasury

14.2 Recommended High Level Provincial Targets

(Aligned to SAT & Scaled Over 5 Years)

Table 19: Implementation Plan

Ref.	Strategic Goals (Limpopo Province)	Priority Strategic Interventions (Key Result Area)	Baseline 2024	Target 2030	Lead / Co-Lead	Key Partners
11.2.1	Strengthen Destination Positioning of Limpopo Province	1. Define and develop a clear destination positioning strategy and architecture anchored in Limpopo's competitive advantages	- No unified provincial positioning architecture	- Destination positioning: Strategy implemented - Brand awareness: Baseline established - Net Promoter Score: Baseline established - Visitor satisfaction: Baseline established	LTA	LEDET; SAT, DSAC
		2. Implement a unified, insight-driven destination marketing programme	- Domestic trips: 6.3 million (2024) ~7.6mn (2025) - International arrivals: 640,000 (2024) 418,300 (2025) - Tourism spend: R22.6bn - Occupancy: 61.8% - Digital reach:	- Domestic trips: 9,25 million - International arrivals: 1.5 million; - Tourism spend: R30bn - Occupancy: 70% - Digital reach: 10 million engagements	LTA	Districts; Industry
		3. Strengthen trade engagement and partnerships to improve conversion and market access	- Baseline to be confirmed	- Conversion rate: 8% - Trade partnerships: 120 - Packaged offerings: 250	LTA	Industry
11.2.2	Drive Inclusive Economic Growth and Employment through Tourism	4. Implement cluster-based tourism development (including MICE)	- Tourism GDP contribution: 7% - Operationalise the defined clusters	- Tourism GDP contribution: 9% - Operational clusters: 6	LEDET / LTA	NDT; Municipalities DSAC
		5. Support SMME integration into tourism value chains	- Tourism employment: 110,000 - SMMEs supported: - Local procurement spend:	- Jobs created: 150,000 - SMMEs supported: 800 - Local procurement spend: R5bn	LEDET	Industry DSAC
		6. Develop route-based and experience-led tourism	- Average stay: 3.6 nights - Bed nights: - Geographic spread:	- Average stay: 4 nights - Bed nights: 32 million - Geographic spread: Improved	LTA	Districts DSAC
11.2.3	Enhance Tourism Products, Clusters and Routes	7. Strengthen cluster performance aligned to priority segments	- Cluster economic value: - Investment pipeline: TBC - Pipeline projects: TBC	- Cluster economic value: R12bn - Investment pipeline: R20bn - Pipeline projects: 50	LEDET	Industry

Limpopo Tourism Growth Strategy & Implementation Plan 2026-2030

Ref.	Strategic Goals (Limpopo Province)	Priority Strategic Interventions (Key Result Area)	Baseline 2024	Target 2030	Lead / Co-Lead	Key Partners
		8. Develop priority tourism routes and corridors	- Routes baseline to be confirmed through audit; - Corridors: 3 (Waterberg Biosphere; Soutpansberg–Mapungubwe; Kruger–Lowveld)	- Market-ready routes: to be determined - Corridors: to be determined - Dispersal index: 0.65	LTA	Districts
		9. Develop and promote tourism experiences	- Packaged experiences: TBC - Visitor satisfaction: TBC - Repeat visits: TBC	- Packaged experiences: 300 - Visitor satisfaction: 90% - Repeat visits: 60%	LTA	Industry
		10. Develop digital platforms for tourism marketing and bookings	Fragmented digital systems	- Integrated tourism platform - Bookings: 600,000 - Digital conversion: 8%	LTA	ICT partners
11.2.4	Advance Sustainable, Responsible, Climate Resilient and Conservation-Led Tourism	11. Strengthen biodiversity conservation tourism	Baseline to be confirmed	Conservation-linked tourism projects: 40	LEDET	DFFE
		12. Implement RECP programmes	Baseline to be established	- Enterprises adopting RECP: 40% - Energy/water reduction: 20%	LEDET	NDT
		13. Embed comprehensive climate resilience and all hazards risk management into tourism planning, infrastructure development and destination management systems.	Limited risk planning	- Risk assessments; All major tourism nodes - Provincial resilience framework developed	LEDET	Disaster Management
11.2.5	Improve Access and Infrastructure	14. Tourism-supporting infrastructure development	Occupancy: 61.8%	- Occupancy: 70% - Tourism infrastructure projects: 40	LEDET	Municipalities
		15. Improve road access and signage	Baseline to be confirmed	- Roads improved: 500 km - Accessibility index: 0.75	Transport	SANRAL
		16. Strengthen air, road, rail and other modes of access and regional connectivity to support tourism growth.	- Passenger throughput: 500,000; - Air routes: 6	- Passenger throughput: 1 million; - Routes: 15 - International arrivals: 1.5 million	Province	Airports
		17. Improve digital infrastructure	Baseline to be established	- Connectivity index: 0.85 - Digital engagement: 10 million	LEDET	ICT sector
11.2.6	Build Skills and Professional Standards	18. Tourism skills development programmes	Baseline to be confirmed	- Learners trained: 300 - Placement rate: 70%	LEDET / LTA	CATHSSETA
		19. Enterprise development programmes	Baseline to be confirmed	- Enterprises supported: 800 - Survival rate: 75%	LEDET	Municipalities
		20. Strengthen quality assurance and grading	Grade establishments: 200	50% of establishments graded - Visitor satisfaction: 90% - Net Promoter Score: +50	LTA	TGCSA
11.2.7	Strengthen Governance and Delivery	21. Align tourism priorities with municipal planning	- Baseline to be confirmed - Stakeholder engagements:	- IDPs aligned: 100% - Stakeholder engagements: 12 annually	LEDET	Municipalities
		22. Establish governance structures	Baseline to be confirmed	- Functional committees: 8 - Coordination meetings: 12 annually - Stakeholder satisfaction: 90%	LEDET	LTA
		23. Monitoring and reporting systems	Irregular reporting	- Reporting: Quarterly reporting - Performance dashboard: - Operationalised Compliance: 100%	LEDET	Treasury
		24. Strengthen institutional capacity	PMO not established	- Provincial tourism PMO: Operationalised - Project delivery rate: 80%	LEDET	Industry
11.2.8	Attract Investment and Unlock Tourism Opportunities	25. Facilitate tourism investment	Baseline to be confirmed	- Investment secured: R15bn - Market-ready projects promoted: 40	LEDET	Treasury

Limpopo Tourism Growth Strategy & Implementation Plan 2026-2030

Ref.	Strategic Goals (Limpopo Province)	Priority Strategic Interventions (Key Result Area)	Baseline 2024	Target 2030	Lead / Co-Lead	Key Partners
		26. Develop bankable tourism projects	- Baseline to be confirmed	- Tourism investment pipeline: R20bn	LEDET / LTA	DFIs
		27. Promote PPPs for tourism development	- Baseline to be confirmed	- PPPs initiated: 12 - Infrastructure investment: R12bn -	LEDET	Private sector
		28. Unlock the Tourism Potential of LEDET-Managed Provincial Parks	- Baseline to be confirmed	- Commercialization model implemented	LEDET	Treasury

14.3 Monitoring and Evaluation Plan

Table 20: Monitoring & Evaluation Plan

Strategic Goal (Limpopo Province)	Intervention	Key Indicators (KPIs)	Means of Verification	Reporting Frequency	Responsible Entity
1. Strengthen Destination Positioning of Limpopo Province	1. Define and develop a clear destination positioning strategy and architecture anchored in Limpopo's competitive advantages	Brand awareness; Net Promoter Score; destination perception	Brand tracking studies; visitor surveys	Annual	Limpopo Tourism Agency
	2. Implement a unified, insight-driven destination marketing programme (including crisis communication and reputation management)	Tourist arrivals (domestic, SADC, international); tourism spend; digital reach; campaign engagement; destination sentiment	South African Tourism statistics; digital analytics; media monitoring; campaign reports	Quarterly	Limpopo Tourism Agency
	3. Strengthen trade engagement and partnerships to improve conversion and market access	Number of trade partnerships; conversion rates; packaged offerings	Trade reports; campaign data	Quarterly	Limpopo Tourism Agency
2. Drive Inclusive Economic Growth and Employment through Tourism in Limpopo Province	4. Implement cluster-based tourism development (including MICE) to support inclusive growth	Number of clusters operationalised; tourism GDP contribution; MICE events secured	Cluster reports; economic data; event reports	Annual	LEDET / Limpopo Tourism Agency
	5. Support SMME integration into tourism value chains and local supply chains	Number of SMMEs supported; jobs created; local procurement	SMME databases; programme reports	Quarterly	LEDET
	6. Develop and strengthen tourism corridors, routes and destinations to increase geographic spread and length of stay	Length of stay; bed nights; geographic distribution of visitors	Tourism statistics; visitor surveys	Annual	Limpopo Tourism Agency
3. Enhance Tourism Products, Clusters and Routes in Limpopo Province	7. Strengthen cluster performance and market positioning aligned to priority segments	Cluster performance; number of enterprises participating; investment pipeline	Cluster reports; investment reports	Annual	LEDET
	8. Develop and strengthen priority tourism routes and corridors to improve visitor dispersal	Number of routes developed; number of itineraries; visitor dispersal	GIS mapping; route reports	Quarterly	Limpopo Tourism Agency
	9. Develop, package and promote market-ready tourism experiences and itineraries	Number of packaged experiences; visitor satisfaction; repeat visitation	Product databases; visitor surveys	Annual	Limpopo Tourism Agency
	10. Develop and implement digital platforms and systems for tourism marketing, booking and visitor information	Platform usage; bookings; digital conversion rates	Platform analytics; system reports	Quarterly	Limpopo Tourism Agency / LEDET
4. Advance Sustainable, Responsible, Climate Resilient and Conservation-Led Tourism in Limpopo Province	11. Strengthen biodiversity conservation and conservation-linked tourism development	Number of conservation-linked tourism initiatives; compliance with environmental standards	Environmental reports; conservation data	Annual	LEDET / DFFE
	12. Implement resource efficiency and cleaner production (RECP) programmes across the tourism sector	Number of enterprises adopting RECP; reduction in energy, water and waste usage	RECP programme reports; audits	Annual	LEDET / National Department of Tourism
	13. Embed comprehensive climate resilience and all hazards risk management into tourism planning, infrastructure development and destination management systems.	Number of risk assessments; number of resilient infrastructure projects; recovery time	Disaster management reports; infrastructure reports	Annual	LEDET
	14. Plan and coordinate tourism-supporting infrastructure development in priority nodes and routes	Number of tourism projects; value of infrastructure investment; occupancy rates	IDPs; budget reports; project reports	Annual	LEDET

Limpopo Tourism Growth Strategy & Implementation Plan 2026-2030

Strategic Goal (Limpopo Province)	Intervention	Key Indicators (KPIs)	Means of Verification	Reporting Frequency	Responsible Entity
5. Improve Access, Infrastructure and Visitor Experience in Limpopo Province	15. Improve road access, signage and wayfinding to key tourism nodes and routes	Kilometres of roads improved; signage installations; visitor satisfaction	Transport reports; site inspections; surveys	Annual	Department of Transport
	16. Strengthen air, road, rail and other modes of access and regional connectivity to support tourism growth.	Number of routes; passenger volumes; international arrivals	Airport data; border reports	Annual	Provincial Government
	17. Improve digital infrastructure and visitor information systems across the province	Connectivity levels; digital readiness index; platform usage	ICT reports; digital analytics	Annual	LEDET
6. Build Skills, Capacity and Professional Standards in Limpopo Province	18. Implement tourism skills development and training programmes aligned to industry needs	Number of learners trained; employment placement rates	Training records; employment reports	Quarterly	Limpopo Tourism Agency / CATHSSETA
	19. Support SMME and enterprise development programmes to improve sustainability and growth	Number of SMMEs supported; business survival rate; turnover growth	SMME reports; financial data	Quarterly	LEDET
	20. Strengthen quality assurance, grading and accreditation across the tourism sector	Number of graded establishments; visitor satisfaction; Net Promoter Score	Tourism Grading Council records; visitor surveys	Annual	Limpopo Tourism Agency
7. Strengthen Governance, Partnerships and Delivery in Limpopo Province	21. Align tourism priorities with municipal IDPs, SDFs and provincial planning frameworks	Number of IDPs aligned; stakeholder engagements	IDP reviews; workshop reports	Annual	LEDET
	22. Establish and strengthen governance and coordination structures across the tourism system	Functional structures; number of coordination meetings	Meeting minutes; governance reports	Quarterly	LEDET / Limpopo Tourism Agency
	23. Implement monitoring, reporting and performance management systems for the strategy	Quarterly reports; dashboards implemented; performance compliance	Monitoring reports; dashboards	Quarterly	LEDET
	24. Strengthen institutional capacity and programme management for tourism delivery	PMO established; project delivery rate; capacity indicators	Institutional reports; performance reviews	Annual	LEDET
8. Attract Investment and Unlock Tourism Opportunities in Limpopo Province	25. Facilitate tourism investment and investor engagement in priority nodes and routes	Value of investment secured; number of investors engaged	Investment reports; financial records	Annual	LEDET
	26. Develop and package bankable tourism projects and a prioritised investment pipeline	Number of bankable projects; size of investment pipeline	Project pipeline reports; feasibility studies	Quarterly	LEDET / Limpopo Tourism Agency
	27. Promote and facilitate public-private partnerships for tourism development	Number of PPPs; infrastructure investment value	PPP agreements; financial reports	Annual	LEDET
	28. Unlock the Tourism Potential of LEDET-Managed Provincial Parks	Medium	Commercialisation programme	LEDET	Treasury

14.4 Risk and Mitigation Strategies

Table 21: Risk and Mitigation Strategies

Strategic Goal (Limpopo Province)	Risk Area	Risk Description	Likelihood	Impact	Linked Interventions	Key Mitigation Strategies
1. Strengthen Destination Positioning of Limpopo Province	Market and Demand	Market volatility, changing traveller preferences and weak destination awareness may reduce visitor growth. Escalation of geopolitical conflicts (e.g. Middle East) impacting fuel prices, air connectivity and global travel sentiment.	Medium High	High High	1, 2, 3, 9, 10	Diversify markets; strengthen experience-based positioning; develop flexible products; use market intelligence; strengthen digital marketing; integrate crisis communication into marketing programmes. Market diversification, domestic/SADC focus, flexible packaging, digital marketing, air-access advocacy, and crisis communication protocols.
2. Drive Inclusive Economic Growth and Employment through Tourism in Limpopo Province	Community and Social	Limited community participation and weak benefit-sharing may reduce local support for tourism development.	Medium	Medium–High	4, 5, 6	Promote community participation and ownership; support local employment and procurement; develop benefit-sharing mechanisms; support community-based tourism linked to routes and clusters.
3. Enhance Tourism Products, Clusters and Routes in Limpopo Province	Product Development and Competitiveness	Limited product diversification and weak packaging of experiences may reduce competitiveness and visitor satisfaction.	Medium	Medium–High	7, 8, 9, 10	Strengthen cluster development; support product packaging and quality standards; enhance route development; strengthen digital platforms and market intelligence
4. Advance Sustainable, Climate-Resilient and Conservation-Led Tourism in Limpopo Province	Environmental, Climate and Heritage	Climate change, biodiversity loss and unmanaged visitor pressure may threaten tourism assets.	High	High	11, 12, 13	Integrate conservation-led tourism; implement visitor management and carrying capacity; promote RECP; strengthen heritage protection; align with environmental legislation
5. Advance Sustainable, Responsible, Climate Resilient and Conservation-Led Tourism in Limpopo Province	Climate Risk and Disaster Events	Recurrent flooding and climate-related shocks may damage infrastructure, disrupt access and affect visitor safety and destination reputation.	High	High	13, 14, 8, 10	Prioritise climate-resilient infrastructure; identify alternative access routes; integrate tourism into disaster management; strengthen early warning systems; support operator preparedness
6. Improve Access, Infrastructure and Visitor Experience in Limpopo Province	Infrastructure and Accessibility	Poor transport infrastructure, unreliable services and limited last-mile access may reduce visitor experience and competitiveness.	High	High	14, 15, 16, 17	Prioritise infrastructure in clusters, routes and nodes; integrate tourism into infrastructure planning; promote PPPs; phase investment; implement quality and safety standards
7. Build Skills, Capacity and Professional Standards in Limpopo Province	Skills, Capacity and Human Capital	Skills shortages, weak enterprise capacity and inconsistent service quality may undermine competitiveness and visitor experience.	Medium–High	Medium–High	18, 19, 20	Align skills programmes with clusters; expand work-integrated learning and RPL; strengthen enterprise support; promote accreditation; partner with SETAs and training institutions
8. Strengthen Governance, Partnerships and Delivery in Limpopo Province	Governance and Institutional	Fragmented governance, unclear mandates and weak coordination may delay implementation and reduce accountability.	High	High	21, 22, 24, 4	Establish Provincial Tourism Steering Committee; formalise cluster and route governance structures; clarify roles and reporting lines; strengthen intergovernmental coordination; implement programme management office and performance reporting

Strategic Goal (Limpopo Province)	Risk Area	Risk Description	Likelihood	Impact	Linked Interventions	Key Mitigation Strategies
7. Strengthen Governance, Partnerships and Delivery in Limpopo Province	Implementation, Monitoring and Performance	Weak monitoring systems, limited data and poor feedback mechanisms may reduce accountability and effectiveness.	Medium–High	Medium–High	23, 10	Establish M&E framework; implement dashboards; conduct regular reviews; use GIS and data systems; apply adaptive management
8. Attract Investment and Unlock Tourism Opportunities in Limpopo Province	Funding and Financial Sustainability	Inadequate funding, over-reliance on public sector resources and limited project readiness may constrain delivery of catalytic tourism projects.	High	High	4, 14, 25, 26, 27	Diversify funding through blended finance and PPPs; prioritise investment-ready projects; establish project preparation support; align tourism priorities with infrastructure and LED budgets; strengthen financial monitoring
8. Attract Investment and Unlock Tourism Opportunities in Limpopo Province	Market and Investor Confidence	Perceptions of poor access, safety risks and weak disaster preparedness may reduce investment and repeat visitation.	Medium–High	High	1, 2, 9, 25, 27	Communicate recovery progress; position Limpopo as resilient; strengthen integrated marketing and reputation management; support operators; promote investment opportunities

Reference List

- African Union (2015) *Agenda 2063: The Africa We Want*. Addis Ababa: African Union Commission.
- African Union (2023a) *Agenda 2063 Overview*. Addis Ababa: African Union Commission.
- African Union (2023b) *Agenda 2063 Aspirations and Goals*. Addis Ababa: African Union Commission.
- African Union (2023c) *First Ten-Year Implementation Report of Agenda 2063 (2014–2023)*. Addis Ababa: African Union Commission.
- African Union (2023d) *Monitoring, Evaluation and Reporting Framework for Agenda 2063*. Addis Ababa: African Union Commission.
- Anglican Church of Southern Africa (2021) *The Life of Manche Masemola*.
- Associated Press (2025) 'Is there an AI bubble? Financial institutions sound a warning', 8 October.
- Bela-Bela Local Municipality (2024) *Integrated Development Plan 2024/25–2026/27*. Bela-Bela: Bela-Bela Local Municipality.
- BirdLife South Africa (2022a) *Capricorn–Letaba Birding Route*. Johannesburg: BirdLife South Africa.
- BirdLife South Africa (2022b) *Conservation Hero – David Letsoalo*. Johannesburg: BirdLife South Africa.
- BirdLife South Africa (2022c) *Lowveld – Hans Merensky Nature Reserve*. Johannesburg: BirdLife South Africa.
- BirdLife South Africa (2022d) *Waterberg – Nylsvley Nature Reserve*. Johannesburg: BirdLife South Africa.
- Brás, J.M., Costa, C. and Buhalis, D. (2010) 'Network analysis and wine routes', *The Service Industries Journal*, 30(10), pp. 1621–1641.
- Bruwer, J. (2003) 'South African wine routes', *Tourism Management*, 24(4), pp. 423–435.
- Bulpin, T.V. (1962) *The Ivory Trail: Adventures in the African Wilderness*. Cape Town: Books of Africa.
- Capricorn District Municipality (2025) *Integrated Development Plans (IDPs)*. Polokwane: Capricorn District Municipality.
- Carruthers, J. (2008) *Conservation and Wildlife Management in South Africa*. Pietermaritzburg: University of KwaZulu-Natal Press.
- Citizen (2024) 'Limpopo's tourism on the rise but unemployment is still a problem'.

Community Routes Tourism Sector Study (2006) *Community/Routes Tourism Sector Study: Growth Strategy*. Pretoria: FRIDGE/ECI Africa.

Constitution of the Republic of South Africa (1996). Pretoria: Government Printer.

Cross-Border Road Transport Agency (2024) *Annual State of Cross-Border Operations Report*. Pretoria: Cross-Border Road Transport Agency.

Deloitte (2025) *Global economic outlook: Weekly update*.

Department of Communications and Digital Technologies (2023) *SA Connect: National Broadband Policy Implementation Report*. Pretoria: Government of South Africa.

Department of Economic Development, Environment and Tourism (LEDET) (2015) *Limpopo Development Plan (2015–2019)*. Polokwane: Limpopo Provincial Government.

Department of Economic Development, Environment and Tourism (LEDET) (2016) *Limpopo Tourism Growth Strategy (2016–2021)*. Polokwane: Limpopo Provincial Government.

Department of Economic Development, Environment and Tourism (LEDET) (2018) *Review of the Limpopo Tourism Master Plan*. Polokwane: Limpopo Provincial Government.

Department of Economic Development, Environment and Tourism (LEDET) (2022) *Approved Organisational Structure*. Polokwane: Limpopo Provincial Government.

Department of Economic Development, Environment and Tourism (LEDET) (2023) *State and Rationalisation of Limpopo Provincial Protected Areas*. Polokwane: Limpopo Provincial Government.

Department of Economic Development, Environment and Tourism (LEDET) (2024) *Limpopo Provincial Budget Adjustments 2024/25*. Polokwane: Limpopo Provincial Treasury.

Department of Economic Development, Environment and Tourism (LEDET) (2025a) *Annual Performance Plan 2025/26*. Polokwane: Limpopo Provincial Government.

Department of Economic Development, Environment and Tourism (LEDET) (2025b) *Limpopo Provincial Budget 2025/26*. Polokwane: Limpopo Provincial Treasury.

Department of Forestry, Fisheries and the Environment (DFFE) (2023) *National Biodiversity Economy Strategy (NBES)*. Pretoria: Government of South Africa.

Department of Forestry, Fisheries and the Environment (DFFE) 2022, *National Cleaner Production Programme South Africa Report*, Pretoria.

Department of Tourism (2016) *National Tourism Sector Strategy 2016–2026*. Pretoria: Department of Tourism.

Department of Tourism (2021) *National Tourism Sector Strategy 2016–2026 Revised Edition*. Pretoria: Department of Tourism.

Department of Tourism (2023) *Tourism Sector Master Plan*. Pretoria: Department of Tourism.

Department of Tourism (2024) *Annual Report 2023/24*. Pretoria: Department of Tourism.

Department of Tourism, Republic of South Africa (2016) *Operational Guidelines for Community-Based Tourism in South Africa*. Pretoria: Department of Tourism and International Labour Organization.

Dube, K. (2024) 'Tourism resilience and challenges in Limpopo, South Africa', *Development Southern Africa*, 41(2), pp. 1–18.

East Coast Radio (2024) 'GNU to prioritise growth and jobs: Ramaphosa'.

Eastern Cape Provincial Treasury (2025) *Estimates of Provincial Revenue and Expenditure 2025/26*. Bhisho: Eastern Cape Provincial Government.

EWN (2025) 'ANC unveils ten-point plan to boost economy'.

EY (2025) *Global economic outlook 2025*.

Financial Times (2025) 'IMF and BoE warn AI boom risks "abrupt" stock market correction', 30 September.

Free State Gambling, Liquor and Tourism Authority (2024) *Annual Report 2023/24*. Bloemfontein: Free State Provincial Government.

Gauteng Tourism Authority (2024) *Annual Report 2023/24*. Johannesburg: Gauteng Provincial Government.

Global Africa Network (2024) *Biodiversity holds great potential for growth in the tourism industry*. Johannesburg: Global Africa Network.

Global Market Insights (2024) *Online Travel Agency Market Size, 2024–2032*.

GoLimpopo (2024a) *Limpopo Tourism Agency Annual Report 2024–2025*. Polokwane: Limpopo Tourism Agency.

GoLimpopo (2024b) 'LTA welcomes the Domestic Tourism Survey by Statistics South Africa'.

Google (2024) *Think with Google: Mobile travel booking statistics and insights*.

Grand View Research (2023) *South Africa Wildlife Tourism Market Size and Outlook, 2030*. San Francisco: Grand View Research.

Grand View Research, Inc. (2024) *Southern Africa Safari Tourism Market to Reach USD 23.10 Billion by 2030*. San Francisco: Grand View Research.

Harvard Growth Lab (2025) *South Africa Growth Diagnostics*.

Industrial Development Corporation (IDC) 2021, *Green Economy Strategy and Programme Overview*, Johannesburg.

International Air Transport Association (IATA) (2025) *Gateway Africa: South African Airways expansion*.

International Congress and Convention Association (ICCA) (2024) *Country and City Rankings Report*. Amsterdam: ICCA.

International Finance Corporation (IFC) (2020) *The Unseen Sector: A Report on MSMEs in South Africa*. Washington, DC: IFC.

International Monetary Fund (IMF) (2025a–g) *Various reports on South Africa and global economy*. Washington, DC: IMF.

KPMG (2024) *South Africa's economy facing optimistic future*. Johannesburg: KPMG South Africa.

KwaZulu-Natal Department of Economic Development, Tourism and Environmental Affairs (2025) *Annual Performance Plan 2025/26*. Pietermaritzburg: KwaZulu-Natal Provincial Government.

Limpopo Connexion SOC Ltd (2024) *Provincial Broadband Infrastructure Overview*. Polokwane: Limpopo Connexion.

Limpopo Development Plan (2015–2019). Polokwane: Limpopo Provincial Government.

Limpopo Government (2025a) *Annual Performance Plan 2025/26*. Polokwane: Limpopo Provincial Government.

Limpopo Government (2025b) *Limpopo Provincial Budget Speech 2025*.

Limpopo Provincial Government (2024) *Limpopo Development Plan (LDP) 2025–2030*. Polokwane: Office of the Premier.

Limpopo Provincial Treasury (2025) *Medium Term Provincial Budget Overview 2025/26*. Polokwane: Limpopo Provincial Government.

Limpopo Tourism Act (2009) Act No. 2 of 2009. Polokwane: Limpopo Provincial Government.

Limpopo Tourism Agency (2022) *Annual Report 2021/22*. Polokwane: Limpopo Tourism Agency.

Limpopo Tourism Agency (2024a) *Annual Report 2023/24*. Polokwane: Limpopo Tourism Agency.

Limpopo Tourism Agency (2024b) *Annual Performance Plan 2024/25*. Polokwane: Limpopo Tourism Agency.

McKinsey & Company (2023) *The promise of travel in the age of AI*.

McKinsey & Company (2024) *The State of Travel and Hospitality 2024*. New York: McKinsey Global Institute.

McKinsey & Company (2025) *Remapping travel with agentic AI*.

Mo Ibrahim Foundation (2019) *African Governance Report 2019*. London: Mo Ibrahim Foundation.

Mogale, M.A. (2020) 'Infrastructure and service delivery challenges in rural tourism development in Limpopo Province', *Journal of Public Administration*, 55(4), pp. 765–781.

Mpumalanga Department of Economic Development and Tourism (2025) *Annual Performance Plan 2025/26*. Mbombela: Mpumalanga Provincial Government.

National Treasury (2025) *Provincial Budgets and Expenditure Review 2020/21–2026/27*. Pretoria: National Treasury.

NEPAD (2023) *Continental development framework*. Midrand: NEPAD.

North West Department of Economic Development, Environment, Conservation and Tourism (2024) *Annual Performance Plan 2024/25*. Mahikeng: North West Provincial Government.

Northern Cape Provincial Government (2025) *Budget Speech 2025*. Kimberley: Northern Cape Provincial Government.

Nyikana, S. (2017) 'The role of religious tourism in local economic development in South Africa', *African Journal of Hospitality, Tourism and Leisure*, 6(1), pp. 1–18.

OECD (2020) *OECD Tourism Trends and Policies 2020*. Paris: OECD Publishing.

OECD (2021) *Public governance review and accountability frameworks*. Paris: OECD Publishing.

Parliament of South Africa (2025) *National Route Development Marketing Plan briefing*. Cape Town: Parliament of South Africa.

Phocuswright (2024) *U.S. Online Travel Agency Market Report*.

Phocuswright 2023, *Global Travel Market Report*, Phocuswright, USA.

Quantec Research (2023) *Regional Explorer Database*.

Ramaano, A.I. (2021) 'Potential of ecotourism as a mechanism to buoy community livelihoods', *Journal of Outdoor Recreation and Tourism*, 33.

Reichheld, F.F. 2003, 'The One Number You Need to Grow', *Harvard Business Review*, vol. 81, no. 12, pp. 46–54.

Republic of South Africa (2000) *Municipal Systems Act No. 32 of 2000*. Pretoria: Government Printer.

Republic of South Africa (2003) *Municipal Finance Management Act No. 56 of 2003*. Pretoria: Government Printer.

Republic of South Africa (2013) *Spatial Planning and Land Use Management Act No. 16 of 2013*. Pretoria: Government Printer.

Republic of South Africa (2026) *State of the Nation Address*. Pretoria: Presidency.

Research 2023, *Global Travel Industry Trends Report*, Skift, New York.

Reuters (2025a) 'South Africa GDP and inflation outlook'.

Reuters (2025b) 'South Africa reform and growth outlook'.

Rough Guides (2024) *Sustainable travel in South Africa's Limpopo Province*.

SAnews (2025) *Government economic update*.

Saayman, M., Saayman, A. and Gyekye, A. (2014) 'The economic impact of pilgrimage tourism', *Tourism Economics*, 20(2), pp. 325–339.

SANRAL (South African National Roads Agency Limited) 2022, *Annual Report*, Pretoria.

SITE (2024) *Incentive Travel Index*. New York: Society for Incentive Travel Excellence.

Solimar International (2023) *Tourism Master Planning: Best Practice Framework*. Washington, DC: Solimar International.

South African Department of Tourism (2023) *Tourism Sector Master Plan*. Pretoria: Government of South Africa.

South African Department of Tourism (2024) *Market Access Support Programme*. Pretoria: Department of Tourism.

South African Government (2024) *State of Tourism Report 2024*. Pretoria: Department of Tourism.

South African Government (2025) *National Tourism Statistics: International and Domestic Arrivals 2024*. Pretoria: Statistics South Africa.

South African Tourism (2023) *Unlocking the Domestic Market*. Johannesburg: South African Tourism.

South African Tourism, 2024, *Domestic Tourism Survey*, South African Tourism, Johannesburg. Skift

South African Tourism (2024a) *Domestic Market Report*. Pretoria: South African Tourism.

South African Tourism (2024b) *Discover Limpopo – G20 South Africa*. Johannesburg: South African Tourism.

South African Tourism (2025) *Domestic Tourism Performance Reports 2024*. Johannesburg: South African Tourism.

SpringerLink (2025) *Destination Planning and Management for Sustainable Tourism Development*. Heidelberg: Springer Nature.

Standard Bank TradeClub (2025) *South Africa trade and macroeconomic outlook*.

Statistics South Africa (2022) *Domestic Tourism Survey 2022*. Pretoria: Statistics South Africa.

Stats SA (Statistics South Africa) 2023, *Tourism Satellite Account for South Africa*, Statistics South Africa, Pretoria.

Statistics South Africa (2024) *Tourism Satellite Account*. Pretoria: Statistics South Africa.

Statistics South Africa (2025) *Celebrating Tourism Month in South Africa*. Pretoria: Statistics South Africa.

STR 2024, *Accommodation Performance Data*, STR Global, London.

The Presidency (2025) *Government of National Unity priorities*. Pretoria: Presidency of South Africa.

TGCSA (Tourism Grading Council of South Africa) 2024, *Tourism Grading Programme Data*, TGCSA, Johannesburg.

Timothy, D.J. and Olsen, D.H. (2006) *Tourism, Religion and Spiritual Journeys*. London: Routledge.

Tourism Department (2024) *National Tourism Careers Expo 2024*. Pretoria: Department of Tourism.

Tourism Update (2023) 'Limpopo tourism upbeat about growth prospects'.

Tourism Update (2025) 'South Africa airline route development strategy'.

Trade & Industrial Policy Strategies (2010–2023) *FDI Tracker*.

Tralac (2023) *Regional economic integration in Africa*. Stellenbosch: Trade Law Centre.

UNEP (United Nations Environment Programme) 2019, *Sustainable Consumption and Production: A Handbook for Policymakers*, UNEP, Nairobi.

UNCTAD (2025a) *Guiding Principles for Sustainable Investment in Tourism*. Geneva: United Nations.

UNCTAD (2025b) *BioTrade Congress Report*. Geneva: United Nations. UNWTO (2023) *World Tourism Barometer*. Madrid: UNWTO.

UNIDO (United Nations Industrial Development Organization) 2017, *Resource Efficient and Cleaner Production Programme: Global Progress Report*, UNIDO, Vienna.

UNWTO (2024) *International Tourism Highlights: 2024 Edition*. Madrid: UNWTO.

UNWTO (2025) *World Tourism Barometer: September 2025*. Madrid: UNWTO.

UNWTO (United Nations World Tourism Organization) 2019, *Tourism for Development Report*, UNWTO, Madrid.

United Nations (2015) *Transforming our world: The 2030 Agenda for Sustainable Development*.

University of Johannesburg (2014) 'Economic costs of floods on tourism', *African Journal of Hospitality*.

World Bank (2025) *Tourism and Competitiveness*. Washington, DC: World Bank. World

Economic Forum (2024) *Travel and Tourism Development Index*. Geneva: WEF. World

Travel & Tourism Council (2024) *Economic Impact 2024*. London: WTTC.

World Travel & Tourism Council (2025) *Economic Impact 2025*. London: WTTC.

Western Cape Government (2026) *Main Budget Speech 2026*. Cape Town: Western Cape Government.

World Bank 2018, *Tourism and Local Economic Development: Value Chain Analysis*, World Bank, Washington DC.

WTTC (World Travel & Tourism Council) 2023, *Travel & Tourism Economic Impact Report*, WTTC, London.

Annexure 1: Recommended Interventions by District

Introduction

The implementation of the Limpopo Tourism Growth Strategy requires a spatially differentiated approach that reflects the distinct characteristics, opportunities and constraints of each district municipality. While the strategic goals and interventions provide a coherent provincial framework, their impact will depend on effective localisation at district level.

This section sets out district-specific priorities to guide implementation. It aligns the strategic goals and interventions with priority clusters, routes and tourism nodes, while also responding to local development conditions, infrastructure constraints and market opportunities.

The framework is informed by a cluster-based approach, the development of routes and corridors, the strengthening of tourism experiences, and the need to improve infrastructure, governance and coordination. Particular attention is given to climate resilience and disaster risk management, especially in areas affected by flooding and infrastructure vulnerability.

Cluster Framework

The district approach is aligned to the following provincial clusters:

- Family Recreation & Sport
- Sustainable Wildlife Use
- Nature, Safari & Adventure
- Culture & Heritage
- Business Events / MICE
- Special Interest Experiences & Lifestyle Events

These clusters provide the basis for product development, marketing, investment and skills development across the province.

1. Capricorn District

1.1 District Positioning

Capricorn District functions as the primary gateway to Limpopo Province, anchored by Polokwane. It plays a central role in distributing visitors to other districts and supporting business events, sport tourism and urban-based experiences, including township tourism and nightlife.

(The events hub, with strong potential in MICE, sports, and urban tourism)

1.2 Priority Clusters

- Business Events / MICE
- Family Recreation & Sport
- Culture & Heritage
- Special Interest Experiences & Lifestyle Events

1.3 Priority Routes and Nodes

- R71 Gateway Corridor
- Polokwane
- N1 Corridor

1.4 Key Special Interest Experiences

- Business events and conferencing
- Sport tourism
- Urban and township experiences
- Outdoor recreation

1.5 Implementation Priorities

Intervention	District Focus	Lead	Timeframe	KPI
1. Define and develop a clear destination positioning strategy and architecture	Position Polokwane as the gateway and events hub	LTA	Short	Brand awareness; NPS
2. Implement a unified, insight-driven destination marketing programme	Promote events, sport and short-stay tourism	LTA	Short–Medium	Arrivals; digital reach
3. Strengthen trade engagement and partnerships	Develop event and sport tourism packages	LTA	Medium	Conversion rates
4. Implement cluster-based tourism development (including MICE)	Strengthen the MICE and sport tourism offering	LEDET / LTA	Short–Medium	Cluster performance
6. Develop and promote route-based and experience-led tourism	Strengthen the R71 as a gateway and distribution route	LTA	Medium	Length of stay
14. Plan and coordinate tourism-supporting infrastructure development	Upgrade visitor facilities and gateway infrastructure	LEDET	Short–Medium	Projects
15. Improve road access, signage and wayfinding	Improve access from N1 and key nodes	Transport	Medium	Access index
18. Implement tourism skills development and training programmes	Build hospitality, guiding and event skills	LEDET	Short–Medium	Learners trained
21. Align tourism priorities with municipal IDPs and SDFs	Integrate tourism into local planning	LEDET	Short	IDPs aligned
22. Establish and strengthen governance structures	Improve coordination across stakeholders	LEDET	Short	Coordination
23. Implement monitoring and performance management systems	Strengthen reporting and delivery systems	LEDET	Medium	Compliance

2. Mopani District

2.1 District Positioning

Mopani District is a key nature, safari and adventure destination, and an important gateway to the Kruger National Park. The District is positioned as a strategic anchor for Limpopo's nature-based tourism growth, leveraging its role as a primary gateway to the Kruger National Park and its strong nature-based assets, and established international markets. Its proximity to Kruger, combined with established international demand, places the district at the centre of the province's international arrivals strategy and strengthens Limpopo's overall attractiveness in global nature tourism. At the same time, Mopani has significant potential to expand domestic tourism, diversify its product offering, and increase visitor length of stay; which are important for sustainable, year-round growth.

(The gateway to the Kruger National Park and Limpopo's strongest international arrivals hub)

2.2 Priority Clusters

- Nature, Safari & Adventure
- Wildlife Economy & Conservation
- Family Recreation & Sport
- Special Interest Experiences & Lifestyle Events

2.3 Priority Routes and Nodes

- R71 Corridor
- Phalaborwa (Kruger Gateway)
- Tzaneen

2.4 Key Special Interest Experiences

- Safari and wildlife tourism
- Adventure activities
- Agri-tourism
- Birding
- Wellness tourism

2.5 Implementation Priorities

Intervention	District Focus	Lead	Timeframe	KPI
2. Implement a unified destination marketing programme	Promote nature and Kruger-linked tourism	LTA	Short–Medium	Arrivals
6. Develop route-based tourism	Strengthen the R71 corridor	LTA	Medium	Length of stay
8. Develop tourism routes and corridors	Strengthen Kruger gateway routes	LTA	Medium	Dispersal
9. Package tourism experiences	Develop multi-day itineraries	LTA	Medium	Repeat visits
14. Infrastructure development	Upgrade tourism nodes	LEDET	Short–Medium	Projects
15. Roads and signage	Improve access roads	Transport	Medium	Access
13. Climate resilience	Address flood impacts and recovery	LEDET	Medium–Long	Recovery
23. Monitoring systems	Strengthen implementation tracking	LEDET	Medium	Compliance

3. Sekhukhune District

3.1 District Positioning

Sekhukhune District is an emerging tourism destination, with strong potential in heritage, inland leisure and special interest tourism. Its cultural landscapes, conflict history, mining heritage and dam- based resources provide a basis for future growth. The district is a priority for inclusive growth and rural development. Tourism expansion in this region will support community enterprises, youth employment, and diversification beyond mining.

(An emerging region with high potential in adventure, mining heritage, and rural tourism)

3.2 Priority Clusters

- Culture & Heritage
- Family Recreation & Sport
- Special Interest Experiences & Lifestyle Events

3.3 Priority Routes and Nodes

- Sekhukhune Heritage Route
- De Hoop Dam
- Burgersfort / Steelpoort Mining Belt

3.4 Key Special Interest Experiences

- Battlefield and conflict heritage tourism
- Mining and industrial heritage tourism
- Cultural tourism
- Dam-based recreation
- Events and festivals

3.5 Implementation Priorities

Intervention	District Focus	Lead	Timeframe	KPI
6. Develop route-based tourism	Develop inland leisure and heritage corridors	LTA	Medium	Length of stay
8. Develop tourism routes	Develop heritage and mining routes	LTA	Medium	Routes
9. Package tourism experiences	Develop heritage and battlefield experiences	LTA	Medium	Satisfaction
14. Infrastructure development	Improve access to tourism sites	LEDET	Short–Medium	Projects
15. Roads and signage	Improve road access	Transport	Medium	Access
26. Develop bankable projects	Package catalytic projects (De Hoop Dam)	LEDET	Short–Medium	Pipeline
27. Promote PPPs	Facilitate partnerships	LEDET	Medium	Investment
13. Climate resilience	Address flood and dam safety risks	LEDET	Medium–Long	Risk

4. Vhembe District

4.1 District Positioning

Vhembe District is positioned as a leading cultural, heritage and conservation destination, with strong links to the Mapungubwe cultural landscape, biosphere reserves and cross-border tourism. The District has the strongest cultural and heritage tourism potential in the province, with opportunities in cross-border tourism, eco-tourism, and community-owned enterprises. Growth in this district has significant potential to inclusive tourism and rural development.

(Limpopo's cultural, heritage, and cross-border tourism powerhouse)

4.2 Priority Clusters

- Culture & Heritage
- Wildlife Economy & Conservation
- Special Interest Experiences & Lifestyle Events

4.3 Priority Routes and Nodes

- 4.3.1 Ancient Stone Kingdoms Route
- 4.3.2 Mapungubwe
- 4.3.3 Soutpansberg

4.4 Key Special Interest Experiences

- 4.4.1 Archaeological and heritage tourism
- 4.4.2 Cultural and living traditions
- 4.4.3 Spiritual tourism
- 4.4.4 Eco-tourism
- 4.4.5 Cross-border tourism

4.5 Implementation Priorities

Intervention	District Focus	Lead	Timeframe	KPI
3. Strengthen trade engagement and partnerships	Develop heritage and cross-border tourism packages	LTA	Medium	Conversion
5. Support SMME integration into tourism value chains	Support community-based enterprises	LEDET	Short–Medium	Jobs
8. Develop and strengthen priority tourism routes and corridors	Develop Ancient Stone Kingdoms Route	LTA	Medium	Routes
9. Develop, package and promote market-ready tourism experiences	Strengthen heritage and cultural experiences	LTA	Medium	Satisfaction
11. Strengthen biodiversity conservation and tourism development	Align tourism with conservation areas	LEDET	Medium	Projects
13. Integrate climate resilience and disaster risk management	Strengthen flood risk and safety planning	LEDET	Medium–Long	Risk plans
21. Align tourism with municipal planning frameworks	Improve planning alignment	LEDET	Short	IDPs
22. Establish governance structures	Strengthen coordination with traditional authorities	LEDET	Short	Coordination

5 Waterberg District

5.1 District Positioning

Waterberg District is a mature tourism destination, with a strong focus on wildlife, nature, conservation and high-value leisure tourism. It plays a key role in attracting both domestic and international visitors. Waterberg remains the province's strongest high-yield district, with the greatest potential to drive spend, length of stay, and international arrivals. Growth will be anchored in conservation tourism, premium accommodation, and the Waterberg Biosphere brand.

(Limpopo's flagship wildlife, conservation, and high-value leisure destination)

5.2 Priority Clusters

- 5.2.1 Nature, Safari & Adventure
- 5.2.2 Wildlife Economy & Conservation
- 5.2.3 Family Recreation & Sport
- 5.2.4 Special Interest Experiences & Lifestyle Events

5.3 Priority Routes and Nodes

- 5.3.1 Waterberg–Nylsvley Route
- 5.3.2 Bela-Bela
- 5.3.3 Modimolle
- 5.3.4 Golf Route

5.4 Key Special Interest Experiences

- 5.4.1 Birding
- 5.4.2 Golf
- 5.4.3 Wellness and spa tourism
- 5.4.4 Safari and hunting
- 5.4.5 Outdoor recreation
- 5.4.6 Implementation Priorities

Intervention	District Focus	Lead	Timeframe	KPI
6. Develop route-based tourism	Strengthen tourism corridors	LTA	Medium	Length of stay
8. Develop tourism routes	Strengthen birding and leisure routes	LTA	Medium	Usage
14. Infrastructure development	Upgrade tourism nodes	LEDET	Short–Medium	Projects
15. Roads and signage	Improve visitor access	Transport	Medium	Satisfaction
17. Digital infrastructure	Improve connectivity and visitor information	LEDET	Medium	Engagement
25. Facilitate tourism investment	Support investment in tourism nodes	LEDET	Medium	Investment
13. Climate resilience	Improve infrastructure resilience	LEDET	Medium–Long	Risk



Conclusion

The district framework provides a practical basis for implementing the Limpopo Tourism Growth Strategy at local level. It aligns provincial priorities with district realities, and identifies actions required to strengthen tourism performance across the province.

The focus on routes, experiences, infrastructure, governance and investment supports a more integrated and coordinated approach. The inclusion of climate resilience and disaster risk management further strengthens the long-term sustainability of the tourism sector.

Annexure 2: Limpopo Province Five-Year Results Framework

Baseline and Target Justification by Intervention: Limpopo Tourism Growth Strategy (2026–2030)

1. Methodological Approach

The baseline and target framework for the Limpopo Tourism Growth Strategy (2026–2030) draws on three forms of evidence.

The first consists of **verified statistical baselines** sourced from established national datasets, including the South African Tourism Domestic Market Survey, South African Tourism international tourism statistics, Statistics South Africa tourism surveys and the Tourism Satellite Account, STR Global accommodation performance data, and Tourism Grading Council of South Africa programme data. These sources provide the most reliable basis for indicators such as visitor numbers, tourism spend, bed nights, average length of stay, accommodation occupancy and related market measures (SAT, 2024; Stats SA, 2023; STR Global, 2024; TGCSA, 2024).

The second consists of **administrative baselines** drawn from provincial programme records, investment registers, governance systems and institutional reporting arrangements. These are especially relevant to interventions concerned with coordination, project delivery, planning alignment, programme management and monitoring.

The third consists of **baseline audits still required**. In several areas, no consolidated provincial dataset currently exists. In such cases, the baseline must be established during the early stages of implementation. This applies particularly to measures such as digital reach, conversion, dispersal, accessibility, climate resilience and local procurement.

The principal verified tourism indicators for Limpopo Province in 2024 are set out below:

Indicator	Baseline
Domestic overnight trips	6.3 million
Domestic tourism spend	R16.9 billion
Domestic bed nights	22.3 million
Average length of stay	3.6 nights
International arrivals	640,000
International tourism spend	R5.7 billion
Accommodation occupancy	61.8%
Passenger throughput (tourism airports)	approximately 500,000

These indicators provide the core market baseline for the strategy and underpin many of the targets that follow.

11.2.1 Strengthen Destination Positioning of Limpopo Province

1. Define and develop a clear destination positioning strategy and architecture anchored in Limpopo's competitive advantages
- 2.

KPI	Baseline 2024	Target 2030
Destination positioning	No unified provincial positioning architecture	Strategy implemented
Brand awareness	Baseline to be established	Baseline established
Net Promoter Score	Baseline to be established	Baseline established
Visitor satisfaction	Baseline to be established	Baseline established

Basis and justification

The baseline is correctly stated. Limpopo is already promoted as a destination, but those efforts have not yet been brought together into a single, formally adopted provincial positioning architecture. In

practical terms, this means that the province may have marketing activity, destination messaging, and promotional material, yet still lack a coherent framework that clearly defines what Limpopo stands for, which markets it is prioritising, what visitor promise it is making, and how its competitive strengths should be expressed consistently.

That distinction matters. A destination can engage in marketing activities without a unified positioning strategy. The baseline wording, therefore, avoids overstating the weakness of the current situation, while still accurately identifying the gap that needs to be addressed.

The target of "Strategy implemented" is well framed because this intervention is not, in itself, a demand-growth target. It is a foundational strategic intervention. A properly developed and adopted positioning strategy should provide the basis for clearer destination messaging, better alignment between product and market, stronger brand recognition, more effective trade engagement and more focused destination marketing. Without such a framework, later interventions risk being implemented in a fragmented way. International destination practice consistently shows that clear positioning is central to destination competitiveness and brand consistency (OECD, 2020).

The inclusion of brand awareness, Net Promoter Score and visitor satisfaction as baseline measures to be established is also appropriate. These indicators are not yet consistently embedded in a provincial destination brand management system. Still, they are exactly the measures that should be tracked once a positioning framework is in place. Brand awareness will show whether the destination's identity is becoming more visible. The Net Promoter Score indicates visitor advocacy. Visitor satisfaction will help determine whether the on-the-ground experience matches the promise made in the market.

Taken together, the intervention establishes the strategic foundation for the rest of the destination growth agenda.

2. Implement a unified, insight-driven destination marketing programme

KPI	Baseline 2024	Target 2030
Domestic trips	6.3 million	9.25 million
International arrivals	640,000	1.5 million
Tourism spend	R22.6bn	R30bn
Occupancy	61.8%	70%
Digital reach	Baseline to be established	10 million engagements

Basis and justification

The baseline of **7.6 million domestic trips** in 2025 is a strong starting point. Limpopo already captures a substantial share of South Africa's domestic tourism market, and domestic travel remains the backbone of the province's visitor economy. Nationally, domestic tourism rose from around **34 million trips in 2022 to 37.9 million in 2023 and 40.2 million in 2024**, suggesting a sustained recovery followed by more stable growth (SAT, 2024).

For planning purposes, a **4% to 5% annual growth rate** is a reasonable assumption. It is neither overly cautious nor overly optimistic. If South Africa reaches roughly **50 to 55 million domestic trips by 2030**, and Limpopo broadly maintains its current market share of about **16%**, the province would be expected to reach approximately **9.25 million trips**.

The **international arrivals** target of **1.5 million** is more ambitious, but it remains supportable if read as the upper end of a realistic growth range. South African Tourism aims to achieve approximately **15 million international tourist arrivals by 2030** (SAT, 2024). If Limpopo maintains or slightly improves its current share, a plausible provincial outcome lies broadly in the **1.2 to 1.5 million** range (South African Tourism). The target, therefore, works best when explained as a stretch outcome supported by improved access, stronger regional performance and better destination marketing, particularly in regional African markets. Limpopo had a share of approximately 20% of the South African Tourism Market in 2019 and before that. However, its market share will not simply recover to that level by 2030. The following benchmark was developed from UNWTO reports regarding the recovery of destination tourism markets Post Covid - **Conservative: 3–5% p.a. Recovery phase (post-crisis): 8–12% p.a. High-growth destinations: 12–18% p.a.** Limpopo requires sustained annual growth of

approximately 16–17%, which exceeds typical long-term global tourism growth benchmarks and therefore represents an intervention-driven, high-growth recovery scenario rather than a natural trend projection.

1.5 million represents a conservative recovery scenario, with upside potential toward 2.0–2.2 million should Limpopo regain its historical share of national arrivals.

The **tourism spend** target of **R30 billion** is internally consistent with the growth assumptions elsewhere in the strategy. It reflects higher trip volumes, improved conversion rates, stronger packaging, longer stays, and better overall market performance. It is also a sensible target from a fiscal and planning perspective because it reflects moderate growth rather than an exaggerated forecast. That makes it easier to defend. The average spend of domestic tourists is between R2,500.00 and R4,000.00 or some R15bn – R25bn by 2030. International tourists spend between R12,000 and R20,000 or between R25bn and R40bn. The total by 2030 would be some R25bn – R40bn. This implies that R30bn is a reasonable target.

The **occupancy** baseline of **61.8%** suggests that Limpopo already performs reasonably well in accommodation utilisation. A target of **70%** moves the province into a strong to high-performing range without assuming unrealistic saturation. Given projected growth in trips, bed nights and average stay, the target is credible (STR Global, 2026).

The **digital reach** target of **10 million engagements** is also appropriate. Repeated digital interactions across search, social media, destination content, review platforms and booking channels increasingly shape travel decisions. If visitor demand is expected to grow materially, then a digital engagement target of this scale is justified.

Benchmark scale: domestic tourism growth

Growth level	Annual growth assumption
Conservative	3%–4%
Moderate	4%–6%
High	Above 6%

(SAT, 2024; UNWTO, 2019; OECD, 2020)

Benchmark scale: occupancy

Occupancy level	Interpretation
Below 50%	Weak
50%–60%	Stable
60%–70%	Strong
70%+	High-performing destination

(OECD, 2020; WTTC, 2023)

Benchmark Scale: Digital Engagement

Level	Engagement per traveller
Low	1–2
Moderate	2–4
High	4–6+

(Phocuswright, 2023; Skift, 2023)

3. Strengthen trade engagement and partnerships to improve conversion and market access

KPI	Baseline 2024	Target 2030
Conversion rate	Baseline to be confirmed	8%
Trade partnerships	Baseline to be confirmed	120
Packaged offerings	Baseline to be confirmed	250

Basis and justification

This intervention aims to convert market awareness into actual sales and travel decisions. The target of **120 trade partnerships** is realistic when broken down across the likely categories of partners: international tour operators, regional intermediaries, domestic channels, online travel agencies, wholesalers, booking platforms and other route-to-market players (for example - ~20 international operators, ~40 regional operators, ~60 domestic and digital operators). Seen in that light, the number is not excessive. It reflects a broad-based access strategy rather than a narrow promotional one.

The **8% conversion rate target is ambitious but falls** within the upper end of strong performance. For that reason, it should be clearly defined in the strategy. It is best described as the share of digital engagement, enquiries, or trade interactions that result in a measurable action, such as a booking, a qualified lead, or a package purchase. General tourism websites often convert at around **2% to 5%**, while strong campaigns and better-performing transactional platforms can achieve **5% to 8%** or more (Phocuswright, 2023). With clear packaging, good user experience and effective trade alignment, 8% is a defensible target.

The **packaged offerings target of 250** is equally sound. It does not imply creating 250 completely new products. Rather, it reflects the packaging of existing and emerging assets into market-ready itineraries, bundled experiences, route products and operator-linked offers. That is a practical and necessary step if the province wants to improve conversion and make the destination easier to sell. A breakdown for example could be routes and itineraries 80-100; operator packages 100-120 and themed experiences 40-60).

The strength of the intervention lies in how the three targets reinforce one another: stronger trade partnerships expand market access, better packaging improves product readiness, and higher conversion rates ensure those efforts produce measurable outcomes.

Benchmark scale: digital and trade conversion

Conversion rate	Interpretation
2%–5%	Average destination or website performance
5%–8%	Strong campaign performance
8%–12%	High-performing platform performance

(Phocuswright)

11.2.2 Drive Inclusive Economic Growth and Employment through Tourism

4. Implement cluster-based tourism development (including MICE)

KPI	Baseline 2024	Target 2030
Tourism GDP contribution	7%	9%
Operationalise the defined clusters	Baseline to be confirmed	Operational clusters: 6

Basis and justification

The **7% tourism GDP contribution** should be understood as a planning estimate, informed by national Tourism Satellite Account logic and adjusted to Limpopo's economic structure, rather than as a neatly measured provincial statistic. Limpopo is a tourism intensive province. South Africa's tourism sector contributes some 8% to national GDP if the direct and indirect contribution of tourism spend is taken into account. That is not unusual. Provincial tourism contributions are often estimated using national benchmarks alongside local tourism characteristics. In Limpopo's case, a baseline at this level is reasonable because the province has a strong nature-based tourism profile, substantial domestic tourism, biodiversity assets, heritage resources and important gateway functions (Stats SA, 2023).

The target of **9%** reflects a stronger and more integrated tourism economy. Cluster development supports that shift by linking attractions, accommodation, transport, experiences, supporting services and events into more coherent destination systems. Where tourism is better organised in this way, value retention tends to improve and competitiveness tends to increase.

The target of **6 operational clusters** is not simply about defining clusters on paper. It implies

implementation: governance arrangements, sector participation, market focus, project development and coordinated delivery. That makes it a meaningful target and one that can be defended as a genuine shift from concept to practice.

Benchmark scale: tourism GDP contribution

Contribution level	Interpretation
Below 5%	Limited tourism economy
5%–7%	Moderate tourism contribution
7%–9%	Strong tourism contribution
Above 10%	High tourism intensity

(Stats SA, 2023; WTTC, 2023)

5. Support SMME integration into tourism value chains

KPI	Baseline 2024	Target 2030
Tourism employment	110,000	Jobs created: 150,000
SMMEs supported	Baseline to be confirmed	800
Local procurement spend	Baseline to be established	R5bn

Basis and justification

The employment baseline of **110,000** is best treated as a reasoned provincial estimate derived from national tourism employment data and adjusted to Limpopo's share of tourism activity and its economic structure. National tourism employment is estimated at ~1.6 million or 6-8% of employment (Stats SA, 2023). It should therefore be presented as an estimate rather than a precise official count. Even so, it is a credible figure for planning purposes and provides a sensible base for target-setting (Stats SA, 2023). Limpopo's share of national tourism activity is ~10%. Some 10% of 1.6mn is 160,000. However, this needs to be downscaled to ~110,000 as Limpopo is less urbanised, has lower business event intensity and lower services intensity.

The target of **150,000 jobs created** is consistent with the broader trajectory of the strategy. The 36% growth in jobs is also likely as a result of 33% growth in spend by 2030. If trips, spend, packaging, clusters and enterprise participation all expand, employment should increase alongside them. Tourism remains a labour-intensive sector, particularly in accommodation, food services, attractions, transport and visitor support. For that reason, the jobs target is well grounded in sector behaviour.

Benchmark Scale: Employment Growth

Growth Type	Ratio
Low	<0.5 × sector growth
Moderate	0.5–0.7
High (labour-intensive)	0.7–1.0

(World Bank, 2018)

The target of **800 SMMEs supported** reflects a substantial, but still realistic, scale of intervention over the life of the strategy. It implies more than ad hoc assistance. To be meaningful, it should include market linkage, product development, business support, participation in routes and clusters, procurement opportunities and access to promotion. LEDET supported 498 SMMEs in the last planning period and 155 guides.

The **local procurement spend target of R5 billion (15 -20% of tourism spend)** is especially important because it speaks directly to inclusive growth. It measures not only whether tourism expands, but whether local suppliers and enterprises actually benefit from that growth. Based on a projected tourism economy of **R30 billion**, the target implies moderate local value chain capture. International studies show that in developing tourism economies, local capture is often constrained by leakage, import dependence and weak enterprise linkages, with local procurement or supply chain participation commonly falling in the **10% to 30%** range (UNWTO, 2019; World Bank, 2018). Within that range, a target equivalent to around **15% to 20%** is appropriately cautious.

This intervention gives the strategy real developmental weight by focusing on jobs, enterprise participation and local retention of tourism value.

Benchmark scale: local procurement capture

Share of total tourism spend	Interpretation
Below 10%	Weak local linkages
10%–20%	Moderate local capture
20%–30%	Strong local integration

(UNWTO, 2019; World Bank, 2018)

6. Develop route-based and experience-led tourism

KPI	Baseline 2024	Target 2030
Average stay	3.6 nights	4 nights
Bed nights	Baseline to be confirmed	32 million
Geographic spread	Baseline to be confirmed	Improved

Basis and justification

The **average stay baseline of 3.6 nights** indicates that Limpopo already attracts multi-day visits, but there is still room to deepen the value of each trip. The target of **4 nights** is modest enough to be credible, yet significant enough to influence spending and bed-night performance. It implies a behavioural improvement, not a fundamental shift in market structure.

The **bed nights target of 32 million** is particularly strong because it is closely linked to the projected growth in trips and average stay. If the province reaches **8 million trips** and an average stay of **4 nights**, the resulting bed-night figure is internally consistent with the target. This gives the target a firmer footing than many planning indicators.

The target of **"Improved" geographic spread** is also well judged. Tourism activity in Limpopo remains concentrated in established nodes and corridors, and one of the aims of the strategy is to broaden the spread of visitors across more districts, routes and local areas. Because a formal dispersal baseline has not yet been established, it is sensible to use qualitative wording at this stage rather than imposing a premature numerical value on a concept that still requires technical measurement.

This intervention matters because tourism value does not depend on volumes alone. Longer stays and broader movement across the province increase local spending, support more businesses, and improve the overall developmental impact of tourism.

11.2.3 Enhance Tourism Products, Clusters and Routes

7. Strengthen cluster performance aligned to priority segments

KPI	Baseline 2024	Target 2030
Cluster economic value	Baseline to be confirmed	R12bn
Investment pipeline	TBC	R20bn
Pipeline projects	TBC	50

Basis and justification

The **cluster economic value target of R12 billion** is most defensible when linked directly to the projected size of the provincial tourism economy. If tourism expenditure reaches **R30 billion** by 2030, and roughly **40%** of that value is generated through more structured cluster-based systems, then **R12 billion** is a reasonable outcome. It is conservative enough to allow for uneven maturity across clusters, while still expecting cluster development to carry substantial economic weight.

The **R20 billion investment pipeline (linked to intervention 25. Investment target of 15bn. Pipeline ~1.3x-2)** reflects the total value of projects identified, packaged and promoted for investment. It should not be confused with a secured investment. In practice, project pipelines need to exceed actual realised investment because some projects fall away, are delayed or require further preparation. The target, therefore, follows standard investment promotion logic.

Ratio	Interpretation
1:1	Low pipeline
1.5:1	Moderate
2–3:1	Strong

(World Bank, 2018)

Limpopo $\approx 1.3:1$ – $1.5:1$ → **conservative and realistic**

The **target of 50 pipeline projects** further supports the pipeline's value. A mixed portfolio of accommodation, attractions, infrastructure, and destination projects can plausibly reach this scale over the implementation period, especially if different project sizes are taken into account.

Tourism projects vary widely:

Type	Value
Lodges / accommodation	R20m – R200m
Attractions	R10m – R100m
Infrastructure nodes	R50m – R500m

(World Bank, 2018; WTTC, 2023)

If an average of ~R300 -R400mn is used, then R20bn/R400mn = 50 projects.

The intervention is well constructed because it ties together the economic performance of clusters, the scale of the project pipeline and the number of projects required to drive investment outcomes.

8. Develop priority tourism routes and corridors

KPI	Baseline 2024	Target 2030
Routes baseline to be confirmed through audit	Routes baseline to be confirmed through audit	Market-ready routes: to be determined
Corridors	3 (Waterberg Biosphere; Soutpansberg–Mapungubwe; Kruger–Lowveld)	Corridors: to be determined
Dispersal index	Baseline to be established	0.65

Basis and justification

The route wording in the table is technically appropriate. Route readiness cannot be assumed in advance. Some routes may exist only as concepts, others may be partly developed, and still others may require packaging, signage, infrastructure or coordination before they are commercially ready. A formal audit is therefore the appropriate basis for establishing the baseline and confirming what should count as market ready.

The three corridors listed in the baseline provide a clear spatial frame for the intervention. Leaving the future corridor outcome "to be determined" is sensible because corridor development is likely to vary in pace and depth over the implementation period.

The **dispersal index target of 0.65** provides a measurable way to track whether visitor activity becomes more evenly distributed across the province. Because no provincial dispersal index is currently in use, the baseline will need to be established through spatial analysis using visitor data, accommodation performance, route usage and related information. A target of **0.65** is a good one: it suggests materially improved dispersal without implying unrealistic uniformity across a province with strong existing tourism nodes (OECD, 2020).

Route and corridor development are important not only for product diversification but also for expanding the reach of tourism benefits and supporting more balanced regional participation.

Benchmark scale: dispersal index

Index value	Interpretation
0.30–0.45	High concentration
0.45–0.60	Moderate concentration
0.60–0.75	Good dispersal
Above 0.75	High dispersal

(OECD, 2020; UNWTO, 2019)

9. Develop and promote tourism experiences

KPI	Baseline 2024	Target 2030
Packaged experiences	TBC	300
Visitor satisfaction	TBC	90%
Repeat visits	TBC	60%

Basis and justification

The **packaged experiences target of 300** is a commercialisation target. It reflects the need to turn tourism assets into products that can actually be sold. This includes route itineraries, themed products, cluster-based experiences, bundled offers and operator-linked packages. Because the target is about packaging and market readiness, rather than building 300 new attractions, it is realistic and practical. Example – Routes 10x10 = 100; Cluster experiences = ~100; Operator/ private sector packages = ~100) The **visitor satisfaction target of 90%** places Limpopo in the upper range of destination performance. That is ambitious, but not unrealistic if quality, service, packaging, visitor information and infrastructure improve together. Destinations that perform strongly often achieve satisfaction levels in the **85% to 90%** range, while the best-performing destinations are typically above **90%** (OECD, 2020).

The **target of 60% repeat visits** also fits Limpopo's profile. The province is accessible, benefits from strong domestic tourism and is well suited to return travel. Repeat visitors are particularly valuable because they reduce marketing costs, increase visitor lifetime value and contribute to demand stability. This intervention is central to the strategy because it shifts the province from simply having assets to offering experiences that visitors can buy, enjoy and return for.

Benchmark scale: visitor satisfaction

Satisfaction level	Interpretation
Below 75%	Weak
75%–85%	Average
85%–90%	Strong
90%+	Leading destination

(OECD, 2020)

Benchmark scale: repeat visits

Repeat visitation rate	Interpretation
20%–40%	Long-haul leisure pattern
40%–60%	Mixed market
50%–70%	Strong domestic and regional repeat market

(UNWTO, 2019)

10. Develop digital platforms for tourism marketing and bookings

KPI	Baseline 2024	Target 2030
Integrated tourism platform	Fragmented digital systems	Integrated tourism platform
Bookings	Baseline to be established	600,000
Digital conversion	Baseline to be established	8%

Basis and justification

The baseline of **fragmented digital systems** is accurate. In many destination contexts, digital content, booking systems, product listings, and data platforms are scattered and do not work together smoothly. That weakens the visitor journey and limits conversion.

The target of an **integrated tourism platform**, therefore, represents a significant structural improvement. It implies a platform environment that links marketing, product information, booking functionality, itinerary support, enterprise participation and analytics.

The **600,000 bookings target** is reasonable if treated as a modest share of total visitor demand. With combined domestic and international volumes rising toward **9 to 10 million**, a platform-mediated booking volume of around **5% to 7%** is realistic. It assumes meaningful use of digital channels without assuming the provincial platform will become the dominant transaction channel for all travel.

The **digital conversion target of 8%** is similarly defensible, provided that conversion is clearly defined and linked to good platform design, strong calls to action, mobile optimisation and better product packaging. Under those conditions, the target reflects strong platform performance rather than average website performance (Phocuswright, 2023).

Benchmark Scale: Platform Conversion Share

Share of trips	Interpretation
1–3%	Low
3–7%	Moderate
7–10%	Strong

(Phocuswright; Skift)

Target (~6%) = **moderate-to-strong performance**

This intervention is important because digital infrastructure increasingly shapes destination visibility, commercial performance and enterprise participation.

11.2.4 Advance Sustainable and Conservation-Led Tourism

11. Strengthen biodiversity conservation tourism

KPI	Baseline 2024	Target 2030
Conservation-linked tourism projects	Baseline to be confirmed	40

Basis and justification

The target of **40 conservation-linked tourism projects (6-7 per year)** is well supported by Limpopo's biodiversity, protected areas, reserves, conservancies, and nature-based tourism strengths. Conservation-linked projects may include eco-lodges, biodiversity-linked visitor experiences, trails, community conservation tourism, protected area developments, and partnership-based tourism products.

The number itself is realistic. Over the life of the strategy, it amounts to roughly **six to seven projects per year**, which is manageable when distributed across provincial actors, conservation agencies, communities and private partners. The target also aligns with the strategy's wider investment and product development logic.

This intervention is a natural fit for Limpopo because conservation and tourism are already closely linked in the province's destination offering.

13. Implement RECP programmes

KPI	Baseline 2024	Target 2030
Enterprises adopting RECP	Baseline to be established	40%
Energy/water reduction	Baseline to be established	20%

Basis and justification

The absence of a baseline is appropriate because there is currently no province-wide system for measuring adoption of **resource efficiency and cleaner production (RECP)** in tourism businesses. Establishing that baseline will require enterprise-level assessment or survey work.

The 40% adoption target is credible. Experience from sustainability and cleaner production programmes shows that adoption is usually gradual. Early take-up is often low, but moderate uptake in the **30% to 50%** range becomes possible where awareness, support and incentives are in place (UNIDO, 2017; UNEP, 2019). The target therefore represents a meaningful level of programme penetration without overstating likely results.

The **20% energy and water reduction target** is consistent with the scale of gains often sought in structured efficiency programmes. Such reductions can be achieved through better equipment, operational changes, water-saving systems, waste minimisation and stronger enterprise management (UNEP, 2019).

This intervention matters because sustainability is no longer only a policy consideration. It increasingly affects operating costs, resilience and destination reputation.

Benchmark scale: RECP adoption

Adoption level	Interpretation
10%–20%	Early-stage adoption
30%–50%	Moderate uptake
50%+	Mature adoption environment

13. Embed comprehensive climate resilience and all hazards risk management into tourism planning, infrastructure development and destination management systems

KPI	Baseline 2024	Target 2030
Risk planning	Limited risk planning	Risk assessments; All major tourism nodes
Provincial resilience framework	Baseline to be confirmed	Provincial resilience framework developed

Basis and justification

The baseline of **limited risk planning** accurately reflects the fact that all hazard risks are not yet fully mainstreamed into tourism planning and destination management.

The target that **all major tourism nodes** should undergo risk assessment is appropriate because it ties resilience planning directly to the parts of the tourism system that matter most. This may include exposure to flooding, drought, heat, ecological stress, infrastructure vulnerability and service disruption. The target of a **provincial resilience framework** is equally important. It provides the institutional basis for all hazard risks into tourism planning, investment decisions, infrastructure and destination management. That makes the intervention practical rather than purely aspirational.

11.2.5 Improve Access and Infrastructure

14. Tourism-supporting infrastructure development

KPI	Baseline 2024	Target 2030
Occupancy	61.8%	70%
Tourism infrastructure projects	Baseline to be confirmed	40

Basis and justification

The **61.8% occupancy baseline** shows that Limpopo already has reasonably solid accommodation performance. This makes the **70% target** credible, because it builds on an existing base rather than

trying to leap from underperformance to excellence. Given projected growth in trips, stays and overall demand, the target can be defended as a move into a strong utilisation range (STR Global, 2024).

The **target of 40 tourism infrastructure projects** is also aligned with the broader project and investment framework (Investment pipeline 50. Investment secured 30 plus public sector projects of some 6 per year). These projects may include accommodation improvements, attraction infrastructure, visitor facilities, tourism-supporting public infrastructure and upgrades to existing assets. Spread over the implementation period, the number is demanding but realistic.

This intervention is important because infrastructure quality shapes visitor experience, accommodation performance and investment confidence.

15. Improve road access and signage

KPI	Baseline 2024	Target 2030
Roads improved	Baseline to be confirmed	500 km
Accessibility index	Baseline to be established	0.75

Basis and justification

The target of **500 km of roads improved** is best understood as the cumulative scale of work required to support the province's tourism routes, corridors and destination nodes. Limpopo's tourism system depends heavily on road access, so improvements to tourism-supporting roads are a core enabling condition rather than an optional extra. Tourism routes require 30 to 80km of upgrades per year. Corridors more (World Bank, 2018; SANRAL, 2022). The figure is realistic if implemented in phases and aligned with wider provincial and municipal infrastructure planning. It reflects the physical distance and spatial spread involved in making key tourism areas more accessible.

The **accessibility index target of 0.75** is a sensible systems-level measure. Since no provincial index currently exists, the baseline will need to be established using GIS, travel times, road quality, connectivity and wayfinding information. A target at this level signals strong improvement without pretending that all access constraints in a large rural province can be eliminated.

This intervention is strategically important because access determines whether routes, clusters and outlying tourism areas can actually function.

Benchmark scale: accessibility index

Index value	Interpretation
Below 0.50	Weak access
0.50–0.70	Moderate access
0.70–0.85	Strong access
Above 0.85	Very high accessibility

(OECD, 2020)

16. Strengthen air connectivity

KPI	Baseline 2024	Target 2030
Passenger throughput	500,000	1 million
Air routes	6	15
International arrivals	600,000	1.5 million

Basis and justification

The **passenger throughput target of 1 million** represents a doubling of the current baseline. It is ambitious, but it aligns with the wider expectation of stronger tourism demand, improved market access and better connectivity. As tourism grows, air access becomes increasingly important, especially for regional business, events and higher-value segments.

The **route's target of 15** implies a phased increase from the current base of 6 (includes domestic,

SADC and seasonal), which is realistic when spread over the strategy period. It suggests steady route development rather than an abrupt expansion.

The **international arrivals target of 1.5 million** remains ambitious but can be defended if read as a stretch target supported by stronger regional route development, better connectivity and successful market positioning. Its credibility depends on performance in regional African markets and on improved accessibility.

This intervention matters because air connectivity influences not only leisure tourism, but also investment, event potential and wider regional integration.

17. Improve digital infrastructure

KPI	Baseline 2024	Target 2030
Connectivity index	Baseline to be established	0.85
Digital engagement	Baseline to be established	10 million

Basis and justification

The **connectivity index target of 0.85** reflects a high level of digital access across tourism areas while still acknowledging the realities of a geographically large, partly rural province. Since no tourism-specific provincial connectivity index currently exists, the baseline must first be established.

Benchmark Scale

Index	Interpretation
<0.6	Limited
0.6–0.75	Moderate
0.75–0.9	High
>0.9	Near universal

(UNEP digital infrastructure benchmarks)

Target (0.85) = **high connectivity**

The **digital engagement target of 10 million** is aligned with the destination marketing and platform targets elsewhere in the strategy. It reflects the volume of digital interaction likely to be needed if the province is to support higher visitor demand and stronger digital conversion.

This intervention matters because digital infrastructure now underpins marketing, bookings, information access and enterprise participation.

11.2.6 Build Skills and Professional Standards

18. Tourism skills development programmes

KPI	Baseline 2024	Target 2030
Learners trained	Baseline to be confirmed	300
Placement rate	Baseline to be established	70%

Basis and justification

A target of **300 learners trained** is realistic over the life of the strategy and represents a meaningful skills pipeline. The quality and relevance of that training will be more important than the number alone, so the strongest justification is that training should be aligned to actual demand within tourism businesses and visitor services. Limpopo supported 155 guides in the last planning period.

The **70% placement rate target** is ambitious, but it is defensible if the training is closely linked to labour market opportunities, enterprise development and sector needs. It shows that the strategy is focused on outcomes, not just training volumes.

Benchmark scale: placement rate

Placement rate	Interpretation
Below 50%	Weak labour absorption
50%–65%	Moderate
65%–75%	Strong
Above 75%	High-performing programme

(World Bank, 2018; OECD, 2020)

19. Enterprise development programmes

KPI	Baseline 2024	Target 2030
Enterprises supported	Baseline to be confirmed	800
Survival rate	Baseline to be established	75%

Basis and justification

This intervention extends the SMME agenda by focusing on business viability. The target of **800 enterprises supported** is substantial and aligns with the wider inclusive growth intent of the strategy. The **75% survival rate target** is especially important because it moves beyond counting support beneficiaries to asking whether businesses remain viable. That is a much more meaningful measure of programme success. It is ambitious, but can be justified if enterprise support includes mentoring, market access, procurement linkage, route participation and continued business development assistance.

Benchmark scale: enterprise survival

Survival rate	Interpretation
Below 50%	Weak
50%–65%	Moderate
65%–75%	Strong
Above 75%	Very strong

20. Strengthen quality assurance and grading

KPI	Baseline 2024	Target 2030
Graded establishments	200 graded establishments, representing a baseline share to be confirmed against the total number of eligible tourism establishments in the province	50% of establishments graded
Visitor satisfaction	Baseline to be established	90%
Net Promoter Score	Baseline to be established	+50

Basis and justification

The baseline of **200 graded establishments** is useful, but the corresponding percentage cannot yet be stated with certainty because the total number of eligible establishments has not been confirmed in the table. The safest formulation is therefore to present the baseline as **200 graded establishments, representing a baseline share to be confirmed against the total number of eligible tourism establishments in the province**. That preserves accuracy and avoids overstating what is currently known.

The target of **50% of establishments graded** is appropriate because it shifts the emphasis from an isolated number to a share-based quality target. That is a stronger approach because it can scale with sector growth and formalisation. It also aligns with the logic of improving service quality and competitiveness through wider participation in grading (TGCSA, 2024).

The **visitor satisfaction target of 90%** aligns with the intervention's quality aspiration. It fits the upper end of strong destination performance and can be defended if service standards, visitor information, graded quality and the overall experience improve together (OECD, 2020).

The **Net Promoter Score target of +50** is also strong. An NPS above **+50** is generally regarded as excellent and indicates a high level of visitor advocacy. That makes it an especially valuable complement to satisfaction data.

This intervention is one of the clearest ways to translate tourism growth into stronger standards, better visitor experience and improved destination reputation.

Benchmark scale: Net Promoter Score

NPS score	Interpretation
Below 0	Weak advocacy
0 to +30	Moderate
+30 to +50	Strong
+50 and above	Excellent

(Reichheld, 2003; OECD, 2020)

11.2.7 Strengthen Governance and Delivery

21. Align tourism priorities with municipal planning

KPI	Baseline 2024	Target 2030
IDPs aligned	Baseline to be confirmed	100%
Stakeholder engagements	Baseline to be confirmed	12 annually

Basis and justification

This intervention recognises that tourism strategy is only likely to succeed where it is reflected in municipal planning, local infrastructure decisions and development priorities. The target of **100% IDP alignment** is therefore appropriate because provincial tourism delivery depends on local planning support.

The **12 stakeholder engagements annually** target is realistic and implies regular engagement throughout the year. It gives the strategy a practical mechanism for ongoing coordination rather than occasional consultation.

22. Establish governance structures

KPI	Baseline 2024	Target 2030
Functional committees	Baseline to be confirmed	8
Coordination meetings	Baseline to be confirmed	12 annually
Stakeholder satisfaction	Baseline to be established	90%

Basis and justification

The target of **8 functional committees** points to a more structured governance system across the main strategic and institutional areas of delivery. The focus should not be only on the number, but also on whether the committees are active and effective.

The **12 annual coordination meetings** focus on practicality and ensure regular oversight throughout the year. The **90% stakeholder satisfaction** target is ambitious, but appropriate if governance structures become more responsive, better coordinated and more useful to stakeholders.

This intervention is important because governance quality often determines whether sound strategy turns into real delivery.

23. Monitoring and reporting systems

KPI	Baseline 2024	Target 2030
Reporting	Irregular reporting	Quarterly reporting
Performance dashboard	Baseline to be confirmed	Operationalised
Compliance	Baseline to be confirmed	100%

Basis and justification

The baseline of **irregular reporting** identifies a genuine institutional weakness. The target for quarterly reporting is standard, practical, and necessary for credible oversight of implementation.

The operationalised target of a performance dashboard is equally important because it provides a more structured way to track implementation. The **100% compliance** target is appropriate in this context because the intervention is specifically about monitoring discipline and reporting integrity.

24. Strengthen institutional capacity

KPI	Baseline 2024	Target 2030
Provincial tourism Project Management Office	Project Management Office not established	Operationalised
Project delivery rate	Baseline to be established	80%

Basis and justification

The baseline correctly states that a dedicated **provincial tourism Project Management Office** has not yet been established. The target of an operationalised **Project Management Office** is a major institutional strengthening measure because it creates a central function for planning, coordination, tracking, reporting, implementation support, and problem-solving.

The **80% project delivery rate** is ambitious, but reasonable for a strategy of this scale. It signals a serious commitment to delivery discipline without pretending that all projects will proceed without delay or complication. The Project Management Office is therefore a practical tool for improving implementation performance rather than an administrative formality (OECD, 2020).

11.2.8 Attract Investment and Unlock Tourism Opportunities

25. Facilitate tourism investment

KPI	Baseline 2024	Target 2030
Investment secured	Baseline to be confirmed	R15bn
Market-ready projects promoted	Baseline to be confirmed	40

Basis and justification

The target of **R15 billion investment secured** is best justified by reference to the province's own project pipeline. If the tourism investment pipeline reaches **R20 billion**, and a realistic share of those projects converts into secured or implemented investment, the target is credible. This is a stronger justification than relying on a generic international investment ratio because it is grounded in the province's own delivery framework (World Bank, 2018; WTTC, 2023).

Benchmark Scale: Investment Conversion

Conversion	Interpretation
<50%	Weak
50–65%	Moderate
65–80%	Strong

(World Bank, 2018)

The **40 market-ready projects target** is also realistic and supports the investment objective by **ensuring** a credible pool of projects to take to market.

26. Develop bankable tourism projects

KPI	Baseline 2024	Target 2030
Tourism investment pipeline	Baseline to be confirmed	R20bn

Basis and justification

The **R20 billion pipeline** should be understood as the value of projects identified, prepared and promoted for investment. It is deliberately larger than the secured investment target because all pipelines experience attrition. Some projects do not proceed. Others are delayed, re-scoped or held back by feasibility and financing issues. The pipeline of R20bn represents 65 – 70% of the R30bn tourism spend. The pipeline includes multi-year investments, infrastructure and accommodation and capital stock development.

The target is also supported by the strategy's wider project portfolio logic. A pipeline at this level is realistic if it includes a mix of project sizes across accommodation, attractions, infrastructure and destination development.

27. Promote PPPs for tourism development

KPI	Baseline 2024	Target 2030
PPPs initiated	Baseline to be confirmed	12
Infrastructure investment	Baseline to be confirmed	R12bn

Basis and justification

The **12 PPPs initiated** (includes concession agreements, joint infrastructure development, public land and private sector models and community and private sector models) target is realistic because it is equivalent to roughly two PPPs per year over the strategy period. That allows for a practical mix of partnership-led infrastructure, destination assets, conservation-linked developments and catalytic tourism projects. PPPs represent 20-30% of major tourism projects – 50 in the strategy.

The **R12 billion infrastructure investment** target can be read as the value of PPP-linked infrastructure mobilised within the wider tourism investment framework. It is consistent with the broader investment and pipeline targets and therefore sits comfortably within the strategy's overall financing logic. The total pipeline – R20bn. It is assumed that PPP share = 60%. PPPs tend to be infrastructure heavy and public land based.

PPP promotion matters because certain tourism opportunities are best delivered through partnership structures that combine public assets, private investment and shared implementation responsibilities.

Annexure 3: 2018 Limpopo Tourism Growth Strategy – Indicative Implementation Performance

NTSS PILLAR	OBJECTIVES	PRIORITY PROJECTS	OUTCOMES	ACHIEVED
Family and Recreation Cluster				
EFFECTIVE MARKETING	Improve market and segmentation prioritization	Comprehensive marketing strategy that targets the F&R market	Growing number of domestic and international tourists	
		Increase awareness of tourism offerings/ packages at educational institutions	Increased number of visitors travelling with friends and families	
		Marketing campaigns targeted at the market share of each Tourism Cluster in the LTGS	Increased number of educational institutions travelling in and to Limpopo	
		Update and maintain a database of all provincial tourism products and services		
	Enhance effectiveness of International Marketing	Improve access to reliable information, audio and visual elements on Limpopo Tourism Agency website and other electronic/internet media	Increased number of international/ regional family visits to Limpopo.	
		Establish strong partnerships with the private tourism sector.	Increased length of stay	
		Harness technology – call centres, cell phone apps, etc.	Well managed, interactive and informative website	
		Train information officers		
	Expand and improve domestic marketing activities and travel facilitation programmes	Develop and implement a marketing campaign that aims to turn the Visiting Friend and Relatives (VFR) segment into leisure tourists	Increased number of domestic tourists to Limpopo	
		Develop and implement a specific domestic tourism marketing plan for each LTGS cluster	Increased number of families traveling to Limpopo for holidays	
		Integrate specific marketing initiatives e.g. targeting youth into cluster marketing plans	Increased awareness of F&R cluster in destination Limpopo	
		Leverage from families travelling to Limpopo for weddings and celebration events		
	Use the hosting of events (business, sport and lifestyles) to improve seasonal and regional spread of tourism benefits	Integrated provincial events strategy developed in partnership with the industry	Increased family outings	
		Increase marketing efforts and awareness of events and festivals to be visited as part of promoting local	Improved geographical spread of visitors in Limpopo	
			Tourism beneficiation at local and community level.	
FACILITATE EASE OF ACCESS	Improve access to tourism products and services in Limpopo with emphasis on roads, signage and ICT	Update the provincial tourist map that outlines all the major attractions and icons in Limpopo	Increased road safety on route to tourism destinations	
		Develop a tourist- friendly app for use in Limpopo with all relevant information required by tourists visiting Limpopo	Increased access to tourist icons and destinations	

Limpopo Tourism Growth Strategy & Implementation Plan 2026-2030

		Develop a priority tourist road use plan to be integrated into priority provincial road upgrades and maintenance plans	Improved access to emergency numbers and information on tourism routes	
	Improve airlift access particularly for priority markets and domestic tourism markets.	Open air access into SADC and shared tourism icons	A competitive international airport	
		Negotiate affordable packages for domestic travellers to Polokwane		
VISITOR EXPERIENCE	Improve major sites: Upgrade experience at World Heritage Sites (WHS)	Promote Mapungubwe as a must-visit site in Limpopo	High standard tourist experience offered at Limpopo's World Heritage Sites	
		Develop an integrated tourist plan with an interpretative centre for Makapans		
		Construct off-ramp from N1 to R101 to ease access to Makapans		
	Enhance local destination sites through cleanliness, safety and scenery, aesthetics and information improvements.	Compile database of all graded establishments and implement dedicated awareness and monitoring programmes	High standard offering at tourist products and services in Limpopo	
		Encourage responsible tourism practices, environmentally friendly infrastructure development and utilisation at tourism destinations	Tourism destination safety plan in place	
		Encourage implementation of waste management plans at local recreational areas, small towns and municipal parks	Reliable and adequate information at resorts, tourism info centres and destinations	
			Limpopo experienced as a clean destination	
	Provide tourism experiences and facilities that cater to domestic market segments.	Commercialisation of tourist facilities on provincial nature reserves to expand the tourist experience	Tourist experience in Limpopo expanded	
		Support the development of the Phalaborwa tourist hub	Tourist experience in Limpopo expanded	
		Develop an integrated tourist destination plan linked to the SEZ development between Makhado and Musina	Tourist experience in Limpopo expanded	
DESTINATION MANAGEMENT	Improve the focus and delivery of tourism marketing and development support provided by provinces and local government	Improve accessibility and awareness of all related legislative requirements applicable to tourism businesses	Improved development support from provincial and local government	
			Improved and safe destination offering at local level	
			Compliance to legislation monitored and enforced	
			Maintained excellent service delivery	
	Improve the quality of decision making, planning evaluation and monitoring in tourism.	Dedicated programmes to be implemented to build capacity in tourism on local level	Tourism development plans integrated with other sectoral plans on local level	
		Clear tourism zones and attractions be integrated in spatial and land use plans	Local authorities and tourism associations capacitated in tourism planning, development and monitoring	
TRANS-FORMATION	Achieve BBBEC targets	Assess compliance to the Tourism Scorecard in Limpopo	Transformed tourism industry	

Limpopo Tourism Growth Strategy & Implementation Plan 2026-2030

	Expand benefits of tourism to rural areas.	Develop and implement a rural tourism strategy for Limpopo that aims to unlock tourism opportunities in remote areas	Local communities benefitted from tourism through employment and business ownership	
		Provide opportunities for community partnerships in the commercialisation of tourist facilities and activities on state-owned nature reserves	Increased flow of tourists into rural parts of Limpopo	
Safari and Hunting Cluster				
EFFECTIVE MARKETING	Improve market and segmentation prioritization	Develop a tourist-friendly app for use in Limpopo with all relevant information required by travellers visiting Limpopo	Increased number of international and domestic visitors to Limpopo through expanding the hunting cluster	
		Facilitate the implementation of a road upgrade and maintenance plan for Limpopo		
	Enhance the effectiveness of international marketing	Create safari packages which incorporate activities from other cluster experiences	Increased awareness of Limpopo offering diverse experiences	
		Develop a responsible hunting message that is visible at gateways into Limpopo	Increased number of international hunters	
		Create messaging in marketing campaigns that promote wildlife viewing in its natural environment and not in closed/captured facilities	Limpopo known as a responsible hunting destination	
	Expand and improve domestic marketing activities and travel facilitation programmes	Conduct research on the domestic/biltong hunters' market in Limpopo and opportunities to expand this market segment into leisure tourists	Increased number in domestic travellers to Limpopo	
	Use the Hosting of events (business, sport and lifestyles) to improve seasonal and regional spread of tourism benefits	Explore opportunities to host a major hunting and conservation show in Limpopo in partnership with the private sector	Expanded product offering to increase length of stay	
			Limpopo positioned as the preferred responsible hunting destination	
			Sustainable growth in the safari and hunting market to Limpopo	
FACILITATE EASE OF ACCESS	Improve accessibility to the hunting sector: Roads and signage, airlift 7 ICT	Develop a tourist-friendly app for use in Limpopo with all relevant information required by travellers visiting Limpopo Facilitate the implementation of a road upgrade and maintenance plan for Limpopo	Decreased time spent on travelling	
			Improved air access into remote hunting concession areas	
			Increased road safety	
			Improved cell phone network provision on main roads and in high tourist volume areas	
			Improved availability of information on attractions and activities offered in Limpopo	
	Create a conclusive legislative and regulatory environment	Develop and publish information on all legislative requirements and processes to be followed to hunt in Limpopo on electronic media platforms	Information on all legislative requirements for hunting in Limpopo accessible to all stakeholders	
	Facilitate ease of doing business to ensure growth of the tourism economy	Expand hunting opportunities/game farm development within community owned land	Quality service delivery	
			Increased number of returning tourists	
			Expanded benefits from hunting and game farm management within local communities	

Limpopo Tourism Growth Strategy & Implementation Plan 2026-2030

VISITOR EXPERIENCE	Enhance local destination sites through cleanliness, safety and scenery, aesthetics and information improvements.	Promote the utilisation of registered/qualified professional hunters	Quality service delivery	
		Promote responsible hunting practices	Increase in returning tourists	
			Increase in first time tourists	
			Positive messaging	
DESTINATION MANAGEMENT	Coordination between hunting and tourism sector	Develop an integrated tourism and hunting strategy for Limpopo	Improved institutional arrangements	
			Improved service delivery	
		Clear messaging required to encourage responsible hunting practices in Limpopo	Qualified hunting guides	
			Hunting stakeholders are more informed in the Limpopo Environmental Management Act (Act 7 of 2003)	
			Standardized high- quality provision of services	
			Maintain authentic hunting experiences	
TRANSFORMATION	Support Sustainable Enterprise Development	Identify potential leakages in the value chain of the hunting industry to inform new developments and business growth opportunities in the industry.	Transformed hunting industry (hunting outfitters, wildlife producers, and wildlife and hunting organizations)	
		Identify and facilitate hunting opportunities/ concessions on provincial nature reserves for previously disadvantaged (PDI) hunting entrepreneurs	Local communities benefited from the revenue generated by safari and hunting activities	
		Develop and implement a communal land use model that promotes sustainable utilization of wildlife	Local communities are actively involved with development of new hunting and safari attractions and activities	
Sport & Wildlife				
EFFECTIVE MARKETING	Improve market and segmentation prioritization	Use sporting events as catalyst to grow the tourist market	Increased participation in sporting events	
			Increased number of tourists travelling for sport events in Limpopo	
	Enhance effectiveness of International Marketing	Market weekend sport and wildlife packages to GP, NW &MP	Increased market share through landed sporting events	
		Create wildlife activity packages for pre-and post-major sporting events	Increased number of domestic and international sport lovers to Limpopo	
		Showcase international sporting events hosted in Limpopo on websites		
	Expand and improve domestic marketing activities and travel facilitation programmes	Establish a well-known Limpopo sport and wildlife brand	Limpopo established as destination for sport	
	Use the hosting of events (business, sport and lifestyle) to improve seasonal and regional spread of tourism benefits.	Create partnerships with sport sector	High standard sporting facilities and events hosted in Limpopo	
		Host a number of sporting events in wildlife environments	Increased travellers to Limpopo participating in sporting events	

Limpopo Tourism Growth Strategy & Implementation Plan 2026-2030

FACILITATE EASE OF ACCESS	Improve accessibility to sector and area: Roads & Signage, Airlift	Assess current sporting facilities, venues and activities in Limpopo that could be enhanced to expand the tourism experience	High standard sporting facilities and events hosted in Limpopo	
			Increased travellers to Limpopo participating in sporting events	
VISITOR EXPERIENCE	Enhance local destination sites through cleanliness, safety and scenery, aesthetics and information improvements	Develop an integrated Sport and Wildlife tourism plan for Limpopo to enhance the visitor experience	Providing quality sporting facilities	
			Ensured safety of sporting participants and spectators	
		Partner with the Department of Sports, Arts and Culture, sport organisations and the private sector to drive this cluster	Increased service delivery	
			Encourage sport participants to bring supporters/family members	
DESTINATION MANAGEMENT	Improve the focus and delivery of tourism marketing and development through promoting the Sport and Wildlife cluster	Expand marketing opportunities from leveraging from sporting events hosted in Limpopo	High standard sporting facilities	
		Improve communication channels between provincial and local government sector relating to sport and tourism.	Improved sport development	
		Develop joint provincial offerings with the private sector	Expanded sporting opportunities at offer in Limpopo	
TRANSFORMATION	Support Sustainable Enterprise Development	Implement a dedicated awareness strategy of the Sport and Wildlife cluster	Increased interest in sport tourism	
			SMME support and development	
			Increased skills development	
			Increased support for enterprises	
			Local communities' benefit from the revenue generated by sporting events	
			Local communities are actively involved with development of new attractions and activities	
Culture and Heritage				
EFFECTIVE MARKETING	Improve market and segmentation prioritization	Conduct a market analysis of the Culture and Heritage tourist segment	Increased number of visitors travelling to experience the culture and heritage in Limpopo	
	Enhance effectiveness of International Marketing	Integrate the culture and heritage aspects of Limpopo into all marketing strategies	Increased number of international/ regional tourists travelling for culture and heritage	
			Increased awareness of culture and heritage in destination Limpopo	
	Establish effective brand management	Establish a well-known Limpopo culture and heritage brand on media and marketing platforms	Improved awareness of Limpopo's unique offerings as culture and heritage destination	
		Integrate story-telling into tourist packages	Increased number of domestic travellers to Limpopo for culture and heritage events	

Limpopo Tourism Growth Strategy & Implementation Plan 2026-2030

	Expand and improve domestic marketing activities and travel facilitation	Promote authentic culture experiences	Increased awareness of culture and heritage in destination Limpopo	
	Use the Hosting of events (business, sport and lifestyles) to improve seasonal and regional spread of tourism benefits	Develop a Limpopo Culture and Heritage event strategy	Sustainable culture and heritage events	
FACILITATE EASE OF ACCESS	Improve accessibility to sector and area: Roads & Signage, Airlift	Improve access to Village tourism experiences	Clear signage to various culture and heritage tourism enterprises and destinations	
			Increased road safety	
			Improved cell phone network provision	
			Improved availability of culture and heritage information on attractions and activities on the World Wide Web	
			Improved air access	
VISITOR EXPERIENCE	Improve major sites: Upgrade experience at World Heritage Sites (WHS)	Include smaller/unknown heritage sites into packages/routes promoting Mapungubwe, Makapans and KNP	Expanded Culture and Heritage experience	
	Enhance local destination sites through cleanliness, through cleanliness,	Facilitate clean and safe experiences at heritage sites	Enhanced tourist experienced at Culture and Heritage sites	
	Provide tourism experiences and facilities that cater to domestic market segments	Expand tourism packages that enhance culture and heritage tourism	Increased spend in rural areas of Limpopo	
			Increased length of stay	
			Expanded tourist offering	
DESTINATION MANAGEMENT	Improve the focus and delivery of tourism marketing and development support to enhance culture and heritage experiences	Facilitate the establishment and maintenance of routes that depict the diverse cultural experiences in Limpopo	Communities are more aware of the cultural and heritage values of the surrounding land	
		Expand the African Ivory route experience	Improved availability of culture and heritage information on attractions and activities on the World Wide Web.	
		Facilitate training and support to community structures that offer authentic culture and heritage experiences	Improved access into rural settings	
TRANSFORMATION	Support Sustainable Enterprise Development	Support homestays and Village tourism initiatives with marketing, positioning and development.	More rural tourism enterprise owners	
			Local communities are incorporated into management of culture and heritage attractions and activities	
			Sustainable economic benefits for local communities	
			Job creation	

Limpopo Tourism Growth Strategy & Implementation Plan 2026-2030

Business Events				
EFFECTIVE MARKETING	Improve market and segmentation prioritization	Conduct a market analysis to position Limpopo correctly as business event destination	Limpopo experienced as incentive and exhibition destination	
	Enhance effectiveness of International Marketing	Partner with NCB to increase marketing for business incentives and exhibitions	Increased business travellers to Limpopo	
	Expand and improve domestic marketing activities and travel facilitation	Increase awareness of uniqueness of Limpopo as business events destination	Limpopo seen as a competitive business event destination targeting specific markets	
	Use the Hosting of events (business, sport and lifestyles) to improve seasonal and regional spread of tourism benefits	Leverage from large/medium international/ domestic technical committee business events that relate to key programmes in Limpopo e.g. UNESCO, hunting and conservation associations, SADC development committees etc.	Targeted business events hosted in main destinations	
		Identify specific facilities and destinations in the province that could host special interest events	Increase in hosting medium to large business events in Limpopo	
FACILITATE EASE OF ACCESS	Improve accessibility to sector and area: Roads & Signage, Airlift	Facilitate increase in affordable and reliable air and road access into Limpopo destinations to enhance business tourism	Affordable air travel to Limpopo	
		Maintain database of all business event enterprises	Decreased travel time	
		Monitor service standards in the business tourism cluster	Road infrastructure sufficient for hosting more large business events	
			Business tourists have sufficient ICT services to conduct business without disruptions	
			Increased signage for the various tourism enterprises and destinations	
			Increased road safety	
			Improved availability of information on attractions and activities on the World Wide Web	
VISITOR EXPERIENCE	Improve major sites: Upgrade experience at World Heritage Sites (WHS)	Identify opportunities in World Heritage Sites and National Parks to host business events and incentive programmes	Hosted more business events with on-site accommodation	
			Improved services and facility standards	
	Enhance local destination sites through cleanliness, through cleanliness,	Monitor service standards of business events in Limpopo	Limpopo experienced as safe destination	
			Well-developed websites and information presentation	
			High quality products hosting business events	

Limpopo Tourism Growth Strategy & Implementation Plan 2026-2030

	Provide tourism experiences and facilities that cater to domestic market segments			
DESTINATION MANAGEMENT	Improve the focus and delivery of tourism marketing and development support to enhance culture and heritage experiences	Develop pre-and post- conference leisure packages around the Polokwane area	Appealing pre-and post- conference leisure and wildlife packages available around the Polokwane area	
		Share information pertaining business events with all stakeholders by means of a newsletter/electronic application	Informed and well- trained staff in tourism information centres	
		Facilitate training and support on bidding for events process		
TRANSFORMATION	Support Sustainable Enterprise Development	Improve business events communication platforms across all provincial government departments and community tourism structures	Local communities in rural areas benefitted from business tourism	
		Identify potential business event locations in rural communal areas	Business sector comply with Tourism BEE charter and scorecard	
		Initiate an internship programme to develop event management skills		
Special Interest Cluster				
EFFECTIVE MARKETING	Improve market and segmentation prioritization	Develop specific marketing strategies that target the different segments in the special interest cluster	Marketing initiatives reached the right target audiences	
	Enhance effectiveness of International Marketing	Identify and describe the special interests on offer in Limpopo	Increased number of special interests international/regional travellers	
		Create packages that will promote the different offerings in Limpopo that will attract targeted tourist markets and interests	Increased awareness of special interest activities in Limpopo	
		Conduct impact assessments of the major special interest groups		
		Include special interests as part of the Limpopo tourism brand	Increased number of special interests international/regional travellers	
		Market special interest packages that make whole week getaways in high seasons	Increased awareness of special interest activities in Limpopo	
	Expand and improve domestic marketing activities and travel facilitation	Market special interest packages to GP, NW & MP that make weekend and short getaways		
		Partner with organisations such as SATSA, Fair Trade and BirdlifeSA and help improve their marketing strategies as related to birding tourism	Limpopo well-known as a unique special interest destination	
	Use the Hosting of events (business, sport and lifestyles) to improve seasonal and regional spread of tourism benefits	Establish partnerships with special interest groups/associations	Limpopo known as adventure and golfing destination	

Limpopo Tourism Growth Strategy & Implementation Plan 2026-2030

FACILITATE EASE OF ACCESS	Facilitate increased travel through the application of a tourist-friendly visa regime and automated passenger movement and many systems	Facilitate the development of well- informed special interest brochures in electronic and paper format	Decreased time spent on travelling	
		Educate community tourism structures on special interest attractions/offerings occurring in areas they live and work	Clear signage for the various tourism enterprises and destinations	
		Develop a user-friendly app that provides information on special interest destinations/ offerings in Limpopo	Increased road safety	
			Improved cell phone network provision on high tourist volume areas as well as at special interest enterprises	
			Improved availability of information on attractions and activities on the World Wide Web	
VISITOR EXPERIENCE	Improve destination experiences and World Heritage Sites (WHS) activities to the special interest cluster	Identify special interest offerings on provincial nature reserves and rural areas in Limpopo	Expanded market share visiting World Heritage Sites and parks	
	Enhance local destination sites through cleanliness, through cleanliness, safety and scenery, aesthetics and information improvements	Partner with local municipalities and community tourism associations to enhance access, safety and cleanliness of special interest activities in rural settings and special interest places associations	Enhance tourism destination attractiveness and safety	
			Improve information provision at resorts, tourism info centres and destination	
			More special interest related activities at festivals	
	Provide tourism experiences and facilities that cater to domestic market segments	Conduct assessment of all local municipal recreational areas and special interest offerings	Increased length of stay	
Adequate provision for day visitors travelling with families				
DESTINATION MANAGEMENT	Improve the focus and delivery of tourism marketing and development support to enhance culture and heritage experiences	Constant communication on central platform between public and private sector to stay updated with any changes or opportunities to enhance the special interest cluster	Increased awareness of destinations' special interest activity offerings	
		Identify and develop opportunities to grow agritourism	Maps and guides for special interest activities are updated and informative	
		Assess potential of mining tourism opportunities		
		Expand special interest activities linked to the African Ivory route		
		Explore and develop geotourism opportunities in Sekhukhune		
		Upgrade and develop iconic heritage sites e.g. Dzata, Tjatje		
	Improve the quality of decision making, planning evaluation and monitoring in tourism	Facilitate special interest training programmes	Local communities understand the importance of special interest activities for tourism	
		Monitor implementation of land use policies to ensure protection of special interest sites	Better informed tourism information officers	
		Improve the process of monitoring activities in the special interest cluster		
TRANSFORMATION	Support Sustainable Enterprise Development	Facilitate training and educational programmes in special cluster opportunities	Local people employed in special interest tourism enterprises	
		Provide access to special interest opportunities in provincial nature reserves by PDIs and SMMEs in tourism	Local communities protect special interest attractions	

Limpopo Tourism Growth Strategy & Implementation Plan 2026-2030

20 Hans Van Rensburg Street / 19 Biccard Street, Polokwane, 0700, Private Bag X 9484, Polokwane, 0700
(Switchboard) Tel: +2715 293 8300 Website: www.ledet.gov.za