



MONITORING THE EFFECTIVENESS OF THE TIERED SUPPORT SYSTEM

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DEDT PARTNERS : TOURISM BUSINESS FORUM

- ❖ Cape Craft And Design Institute (CCDI)
- ❖ Cape Town Routes Unlimited (CTRU)
- ❖ Southern African Tourism Services Association (SATSA)
- ❖ Tourism Enterprise Programme (TEP)
- ❖ Federated Hospitality Association of South Africa (FEDHASA)
- ❖ Cape Town Tourism
- ❖ Umsobomvu Youth Fund (UYF)
- ❖ First National Bank (FNB)



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BACKGROUND TO TOURISM BUSINESS DEVELOPMENT INTERVENTIONS

❖ Objectives

- ❖ Focus on emerging entrepreneurs and small and medium sized enterprises (SMEs) within the tourism sector.
- ❖ To address the goals of job creation, economic growth and transformation within the regional tourism industry.

❖ Tiered Support Strategy

- ❖ Framework for facilitating or providing business support services to tourism SMEs.
- ❖ Focus on training, capacity building, access to business opportunities, access to markets and access to finances.

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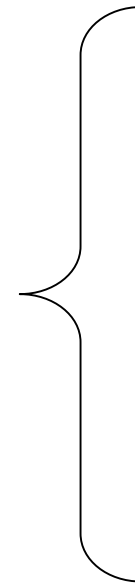


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TIERED SUPPORT FRAMEWORK

- ❖ LEVEL 1 – Considering a tourism venture
- ❖ LEVEL 2 – Start-up enterprises
- ❖ LEVEL 3 – Survivalist Enterprises
- ❖ LEVEL 4 – Established Enterprises



**A. Tourism Business
Management Training**

**B. Business Support
(Mentoring)**

C. Market access

D. Financial Support

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NATURE OF THE INTERVENTIONS

<p><i>Tourism Business Management Training</i></p> <ul style="list-style-type: none"> ❖ Tourism Awareness Information Session ❖ Beginners' Information Session ❖ Intermediate Training ❖ Advanced Training 	<p><i>Business Support</i></p> <ul style="list-style-type: none"> ❖ Fast Track ❖ Tourism Mentorship Programme ❖ Integrated Entrepreneurial Support Programme
<p><i>Market Access</i></p> <ul style="list-style-type: none"> ❖ Cape Tourism Showcase ❖ Indaba Roving ❖ Indaba Exhibitor ❖ Attendance at international shows and workshops 	<p><i>Finances Support and Incentives</i></p> <ul style="list-style-type: none"> ❖ Tourism Enterprise Programme ❖ Department of Trade and Industry incentives

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CONTEXTUALISATION

❖ Data and SME development in the region

- ❖ Some idea as to number of SMEs in certain regions from business support publications.
- ❖ Uncertainty as to actual number tourism SMEs.
- ❖ Tourism satellite account are still to be established.

❖ Focus area for study

- ❖ The 2005 evaluation assessed the impact of interventions on programme participants and developed **benchmarks**.
- ❖ This study provides an opportunity to begin to quantify the tourism SME sector but is only a sample of the total tourism entrepreneur and SME population.
- ❖ The study has provided a database of a section of black owned/managed SMEs in tourism in the Western Cape as part of the aim to support transformation within the sector.

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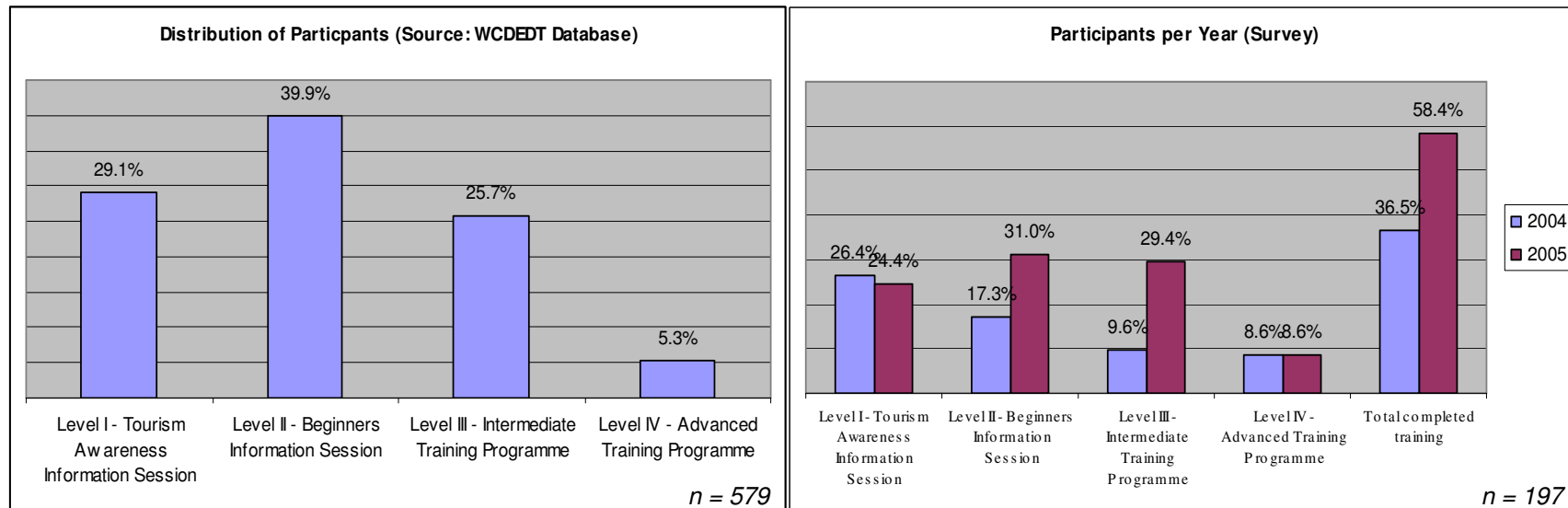


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TOURISM BUISNESS MANAGEMENT TRAINING : PARTICIPATION

- ❖ Total database of programme participants = 579.
- ❖ Sample size of survey = 197 (34% response rate).



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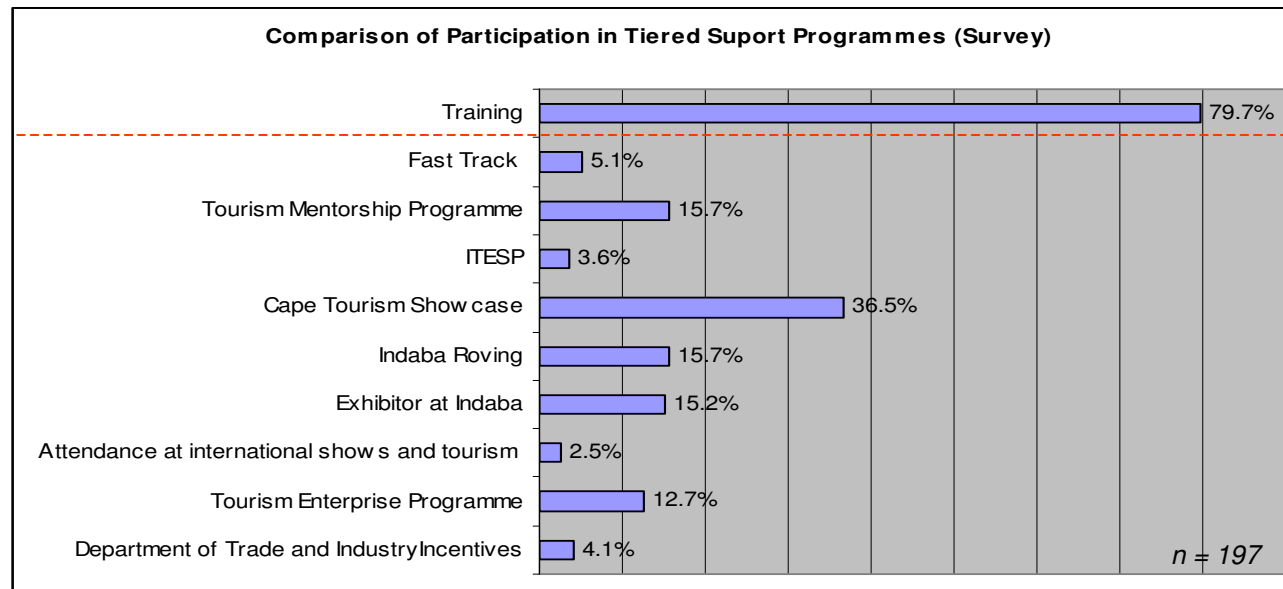


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BUSINESS SUPPORT, MARKET ACCESS AND FINANCIAL SUPPORT : PARTICIPATION

- ❖ After tourism business management training, the Cape Tourism Showcase (market access programme) demonstrated the highest proportion of participation among the sample.



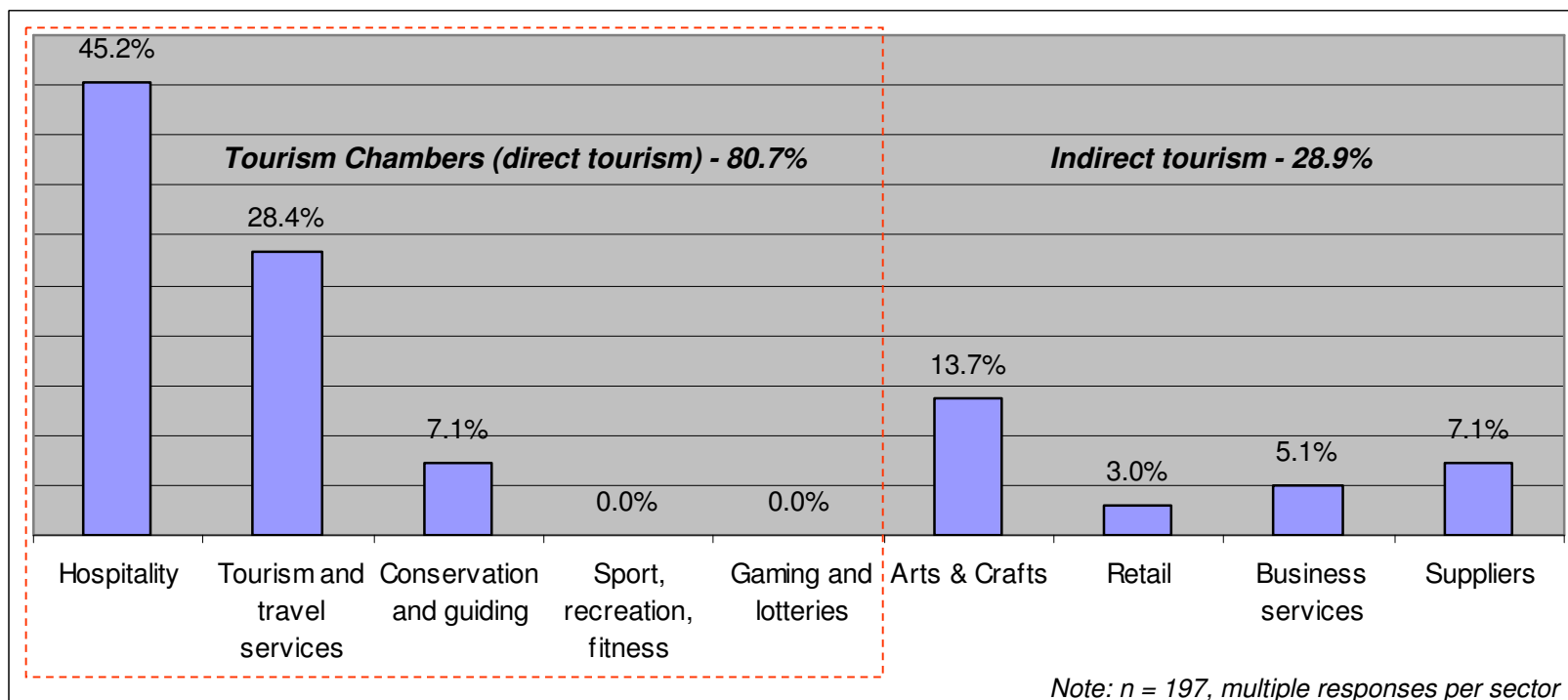
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FOCUS ON DIRECT AND INDIRECT TOURISM ENTERPRISES



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TYPES OF TOURISM ENTERPRISES

<i>Inbound tour operators</i>	24.4%
Bed and breakfast (B&B's)	17.8%
Guest houses	9.6%
Caterers	6.6%
Tourist guiding	5.6%
Homestays	4.1%
Restaurants	3.0%
Self-catering accommodation	2.5%
Event and conference management	2.0%
Sightseeing bus tours	1.5%
Vehicle hire and transport	1.5%
Museum activities and preservation of historical sites	1.5%
Backpackers	1.0%
Camping site	0.5%
Guest farm	0.5%
Tearoom	0.5%
Take-away and fast foods	0.5%
Other catering services (pubs, taverns, night-clubs)	0.5%
Tourism information centres	0.5%
Tourism marketing	0.5%
<i>Note: Multiple responses</i>	<i>(n=197)</i>

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INDUSTRY ASSOCIATION AFFILIATION AND MEMBERSHIP

<i>Local Tourism Authority</i>	47.2%
SATSA	7.6%
GHASA	2.0%
NAFCOC	1.5%
CCDI	1.0%
Tourism Grading Council of SA	1.0%
ASATA	0.5%
CTGA	0.5%
SAACI	0.5%
WECBOF	0.5%
FEDHASA	0.0%
Other	12.2%
None	45.7%
<i>Note: Multiple responses</i>	<i>(n=197)</i>

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FOCUS AREAS FOR MEASURING IMPACTS AND SME DEVELOPMENT

- ❖ Profile of Entrepreneurs
 - ❖ *Location, gender, age, level of education, necessity /opportunity*
- ❖ SME Characteristics
 - ❖ *Years in operation, business registration*
- ❖ Economic Growth
 - ❖ *Turnover, profitability*
- ❖ Job Creation
 - ❖ *Full-time, part-time and seasonal employment*
- ❖ Transformation
 - ❖ *Employment from designated groups, BEE, identity*
- ❖ Business Confidence
 - ❖ *Skills, financial stability, business support needs*

Monitoring and Evaluation
Framework

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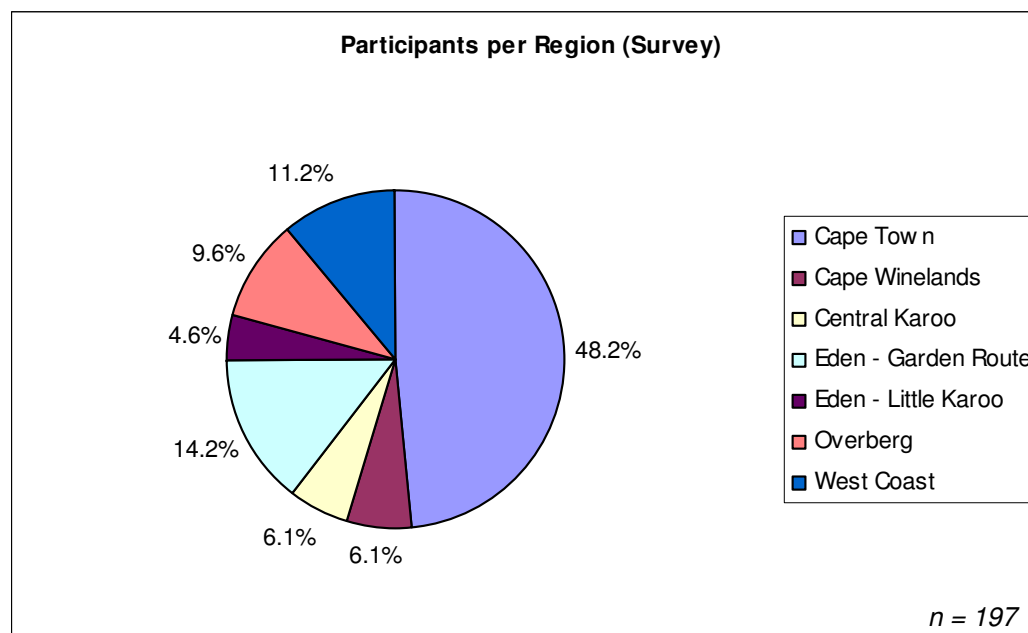


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ENTREPRENEUR PROFILE : LOCATION

❖ Participants from Cape Town are in the majority.



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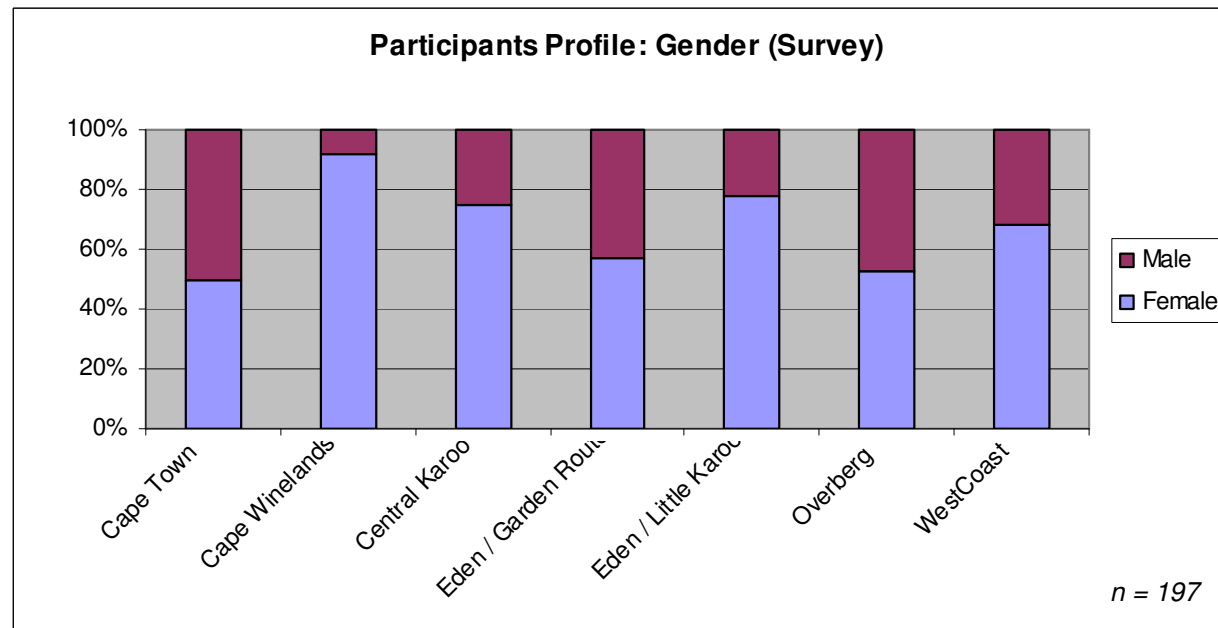


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ENTREPRENEUR PROFILE : GENDER

- ❖ Besides Cape Town, women entrepreneurs are in the majority in each of the regions.



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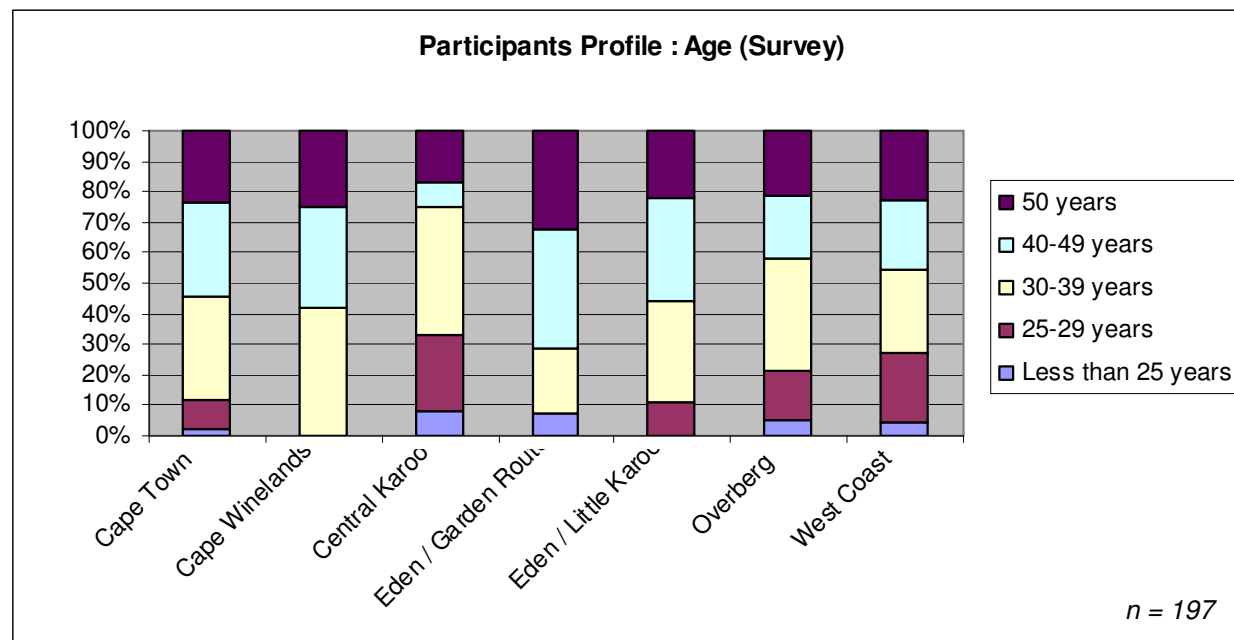


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ENTREPRENEUR PROFILE : AGE

- ❖ Youth (less than 35 years) are under represented among entrepreneurs.



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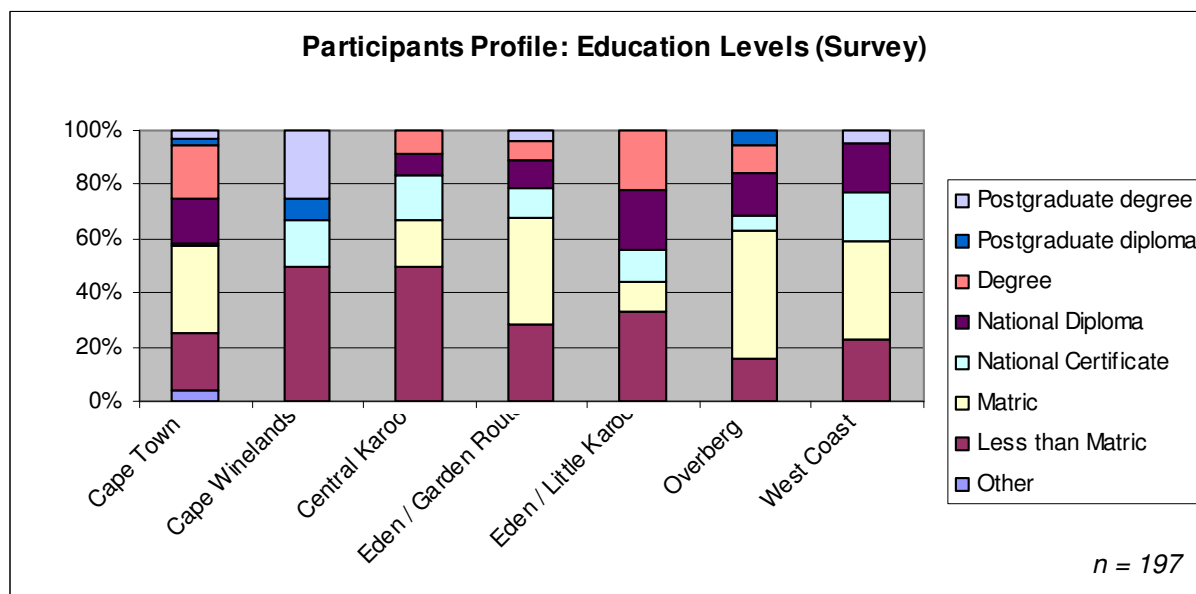


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ENTREPRENEUR PROFILE : HIGHEST LEVEL OF EDUCATION

- ❖ High incidence of entrepreneurs with their highest level of education as Matric or less than Matric.



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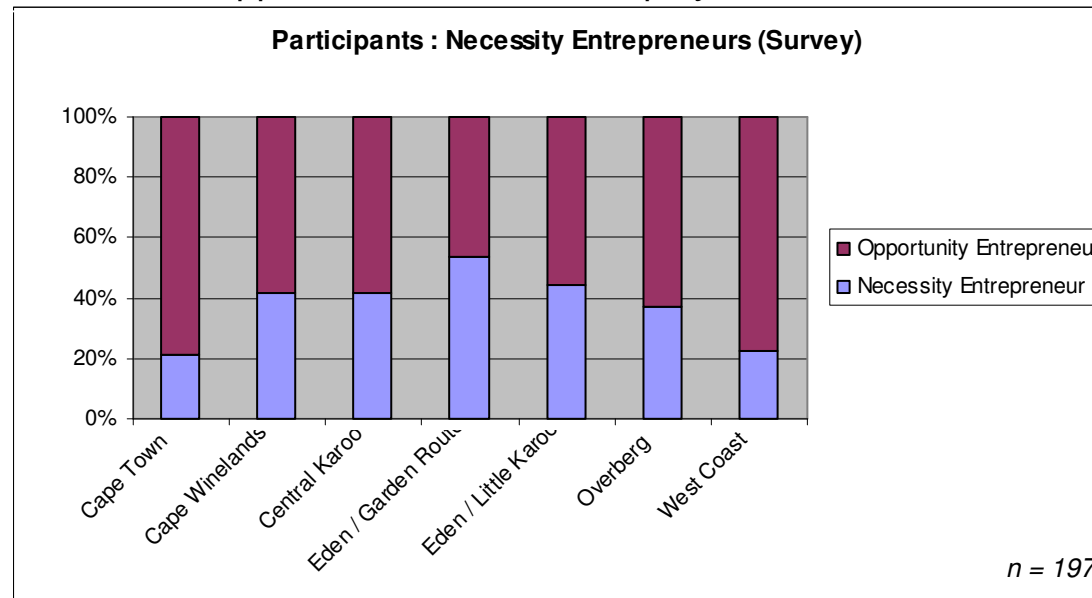


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CHARACTERISTICS OF SMEs : NECESSITY vs OPPORTUNITY ENTREPRENEURS

- ❖ A motivation for starting a tourism enterprise among 24.4% of participants (mostly Level 1) was out of necessity due to the lack of opportunities in formal employment sector.



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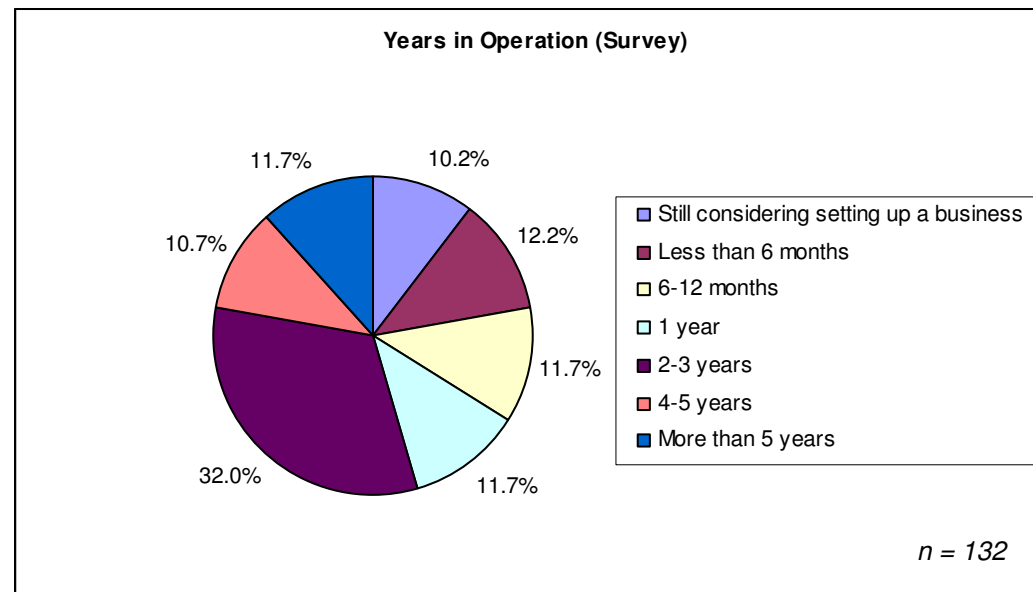


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CHARACTERISTICS OF SMEs : YEARS IN OPERATION

❖ 35.5% of SMEs have been in operation for a year or less.



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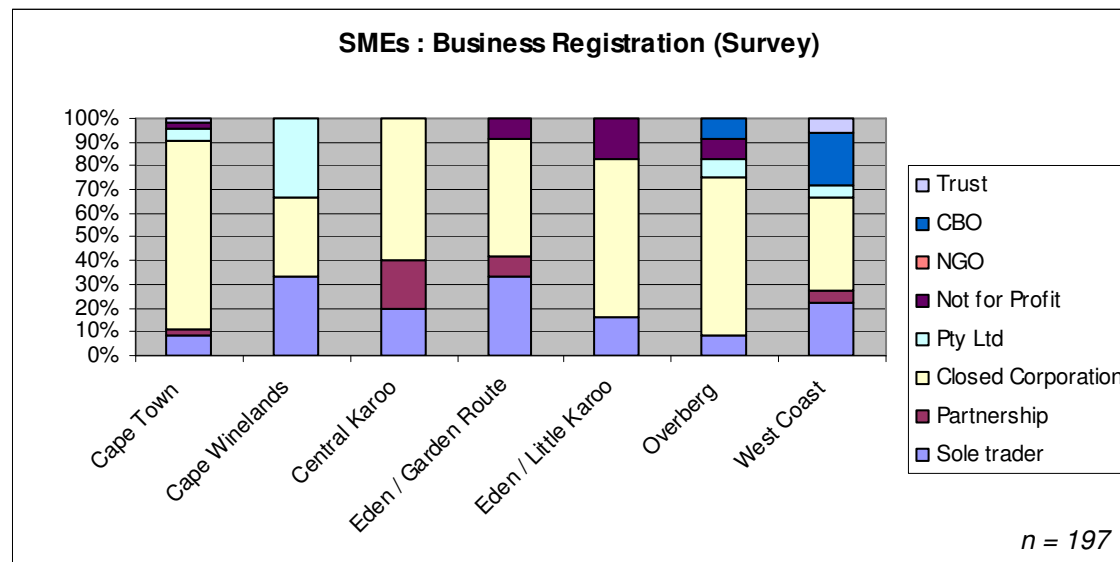


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CHARACTERISTICS OF SMEs : BUSINESS REGISTRATION

- ❖ 10.2% indicated that they were considering setting up a tourism venture.
- ❖ 65% reported that their enterprise was a registered entity.



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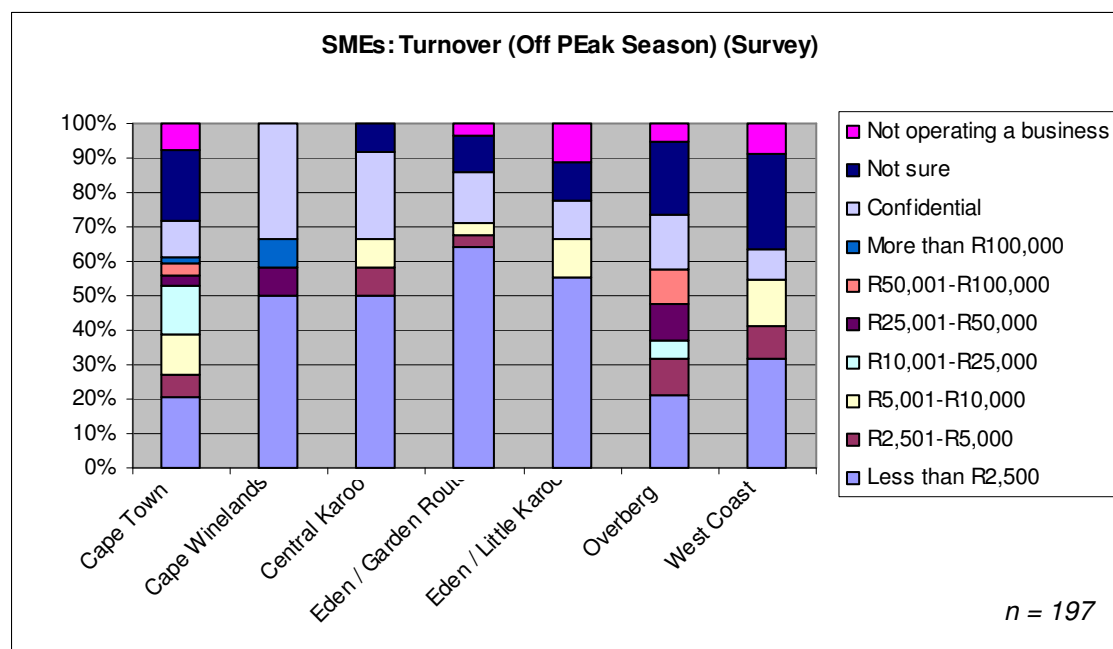


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ECONOMIC GROWTH INDICATORS : MONTHLY TURNOVER

- ❖ Seasonality impacts negatively on tourism turnover and 17.3% “unsure” of their actual earnings.



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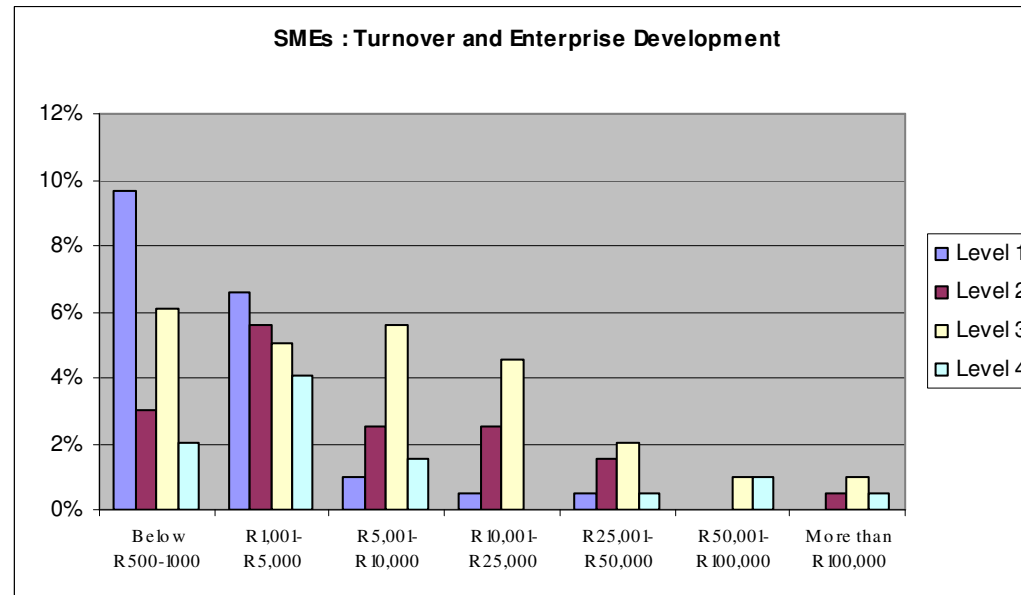


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ECONOMIC GROWTH INDICATORS : MONTHLY TURNOVER AND ENTERPRISE DEVELOPMENT

- ❖ Turnover for the off peak season (July 2005) shows trend toward low earnings regardless of level of enterprise development.



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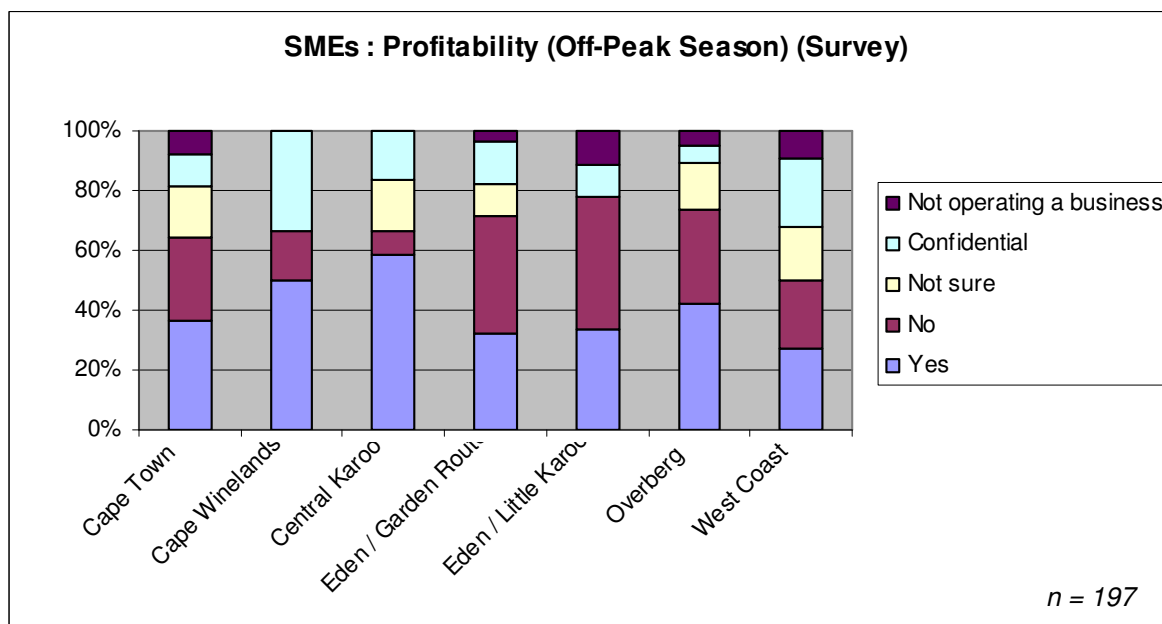


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ECONOMIC GROWTH INDICATORS : PROFITABILITY

❖ 37.1% of participants reported profitability.



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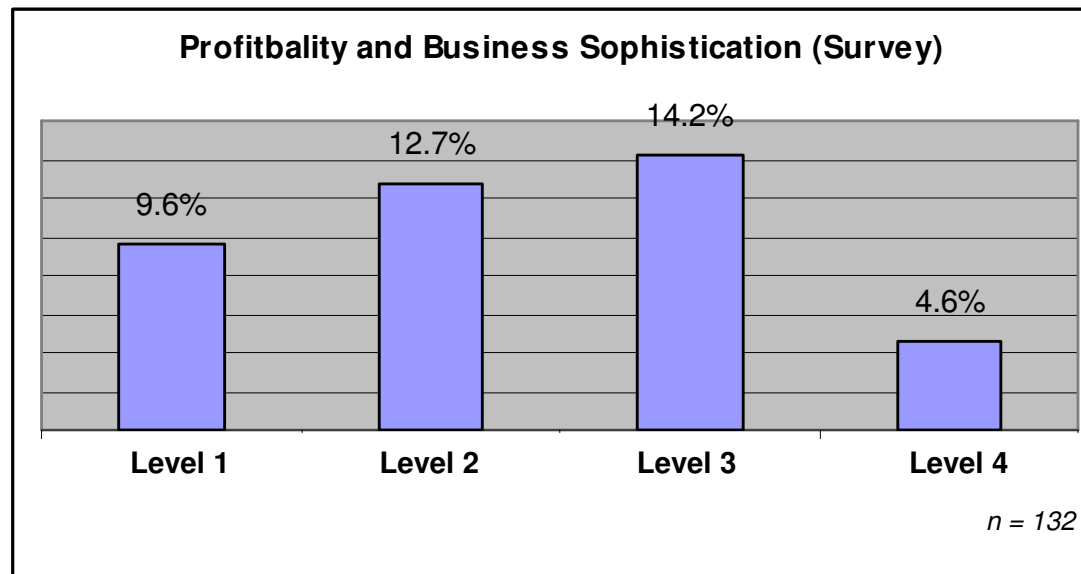


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ECONOMIC GROWTH INDICATORS : PROFITABILITY AND ENTERPRISE DEVELOPMENT

- ❖ Increased profitability is demonstrated as enterprises development.
- ❖ Level 4 enterprises show differing trends and use of profits to invest in operations.



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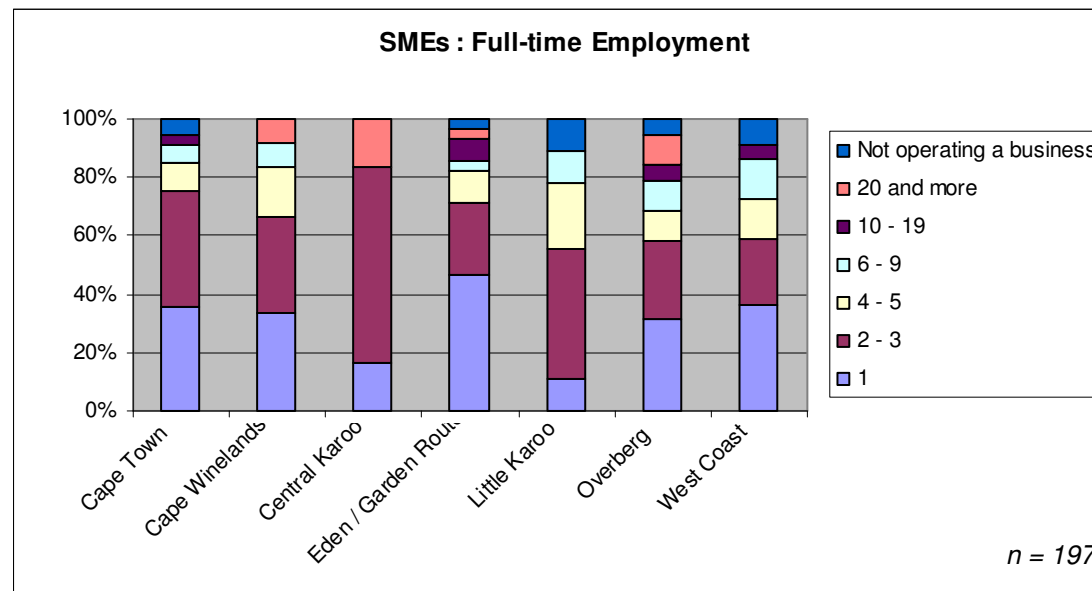


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JOB CREATION : FULL-TIME EMPLOYMENT

- ❖ High instance of 2 – 3 full-time employees within SMEs (including the owner/manager).
- ❖ Hospitality chamber is the largest employer.



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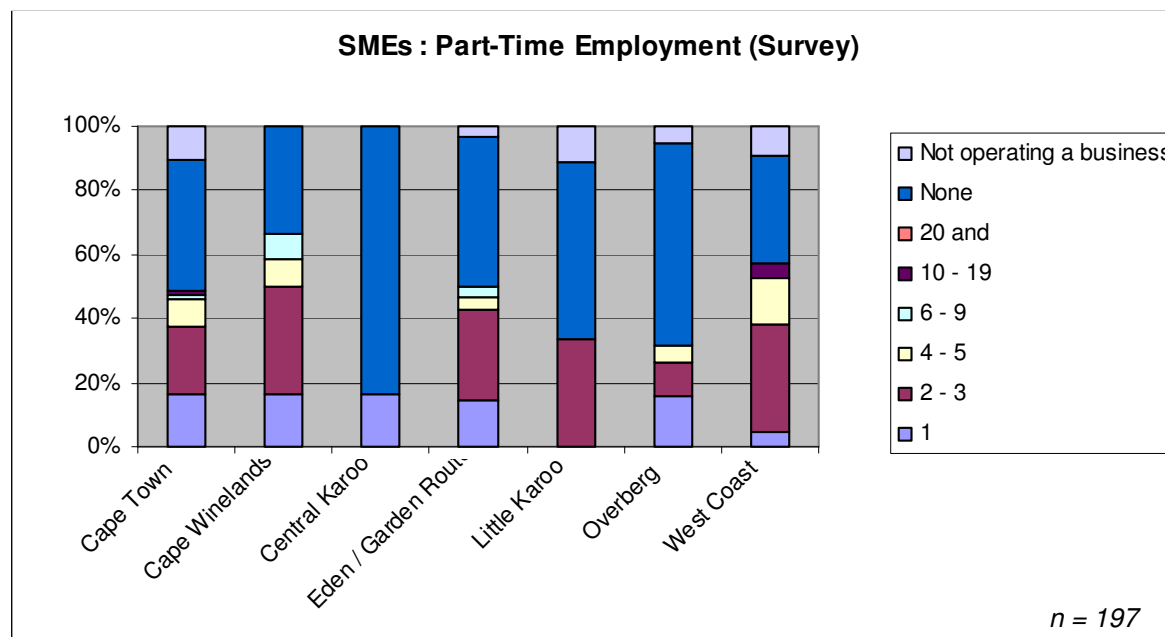


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JOB CREATION : PART-TIME EMPLOYMENT

❖ 46.7% of SMEs reported employing part-time staff.



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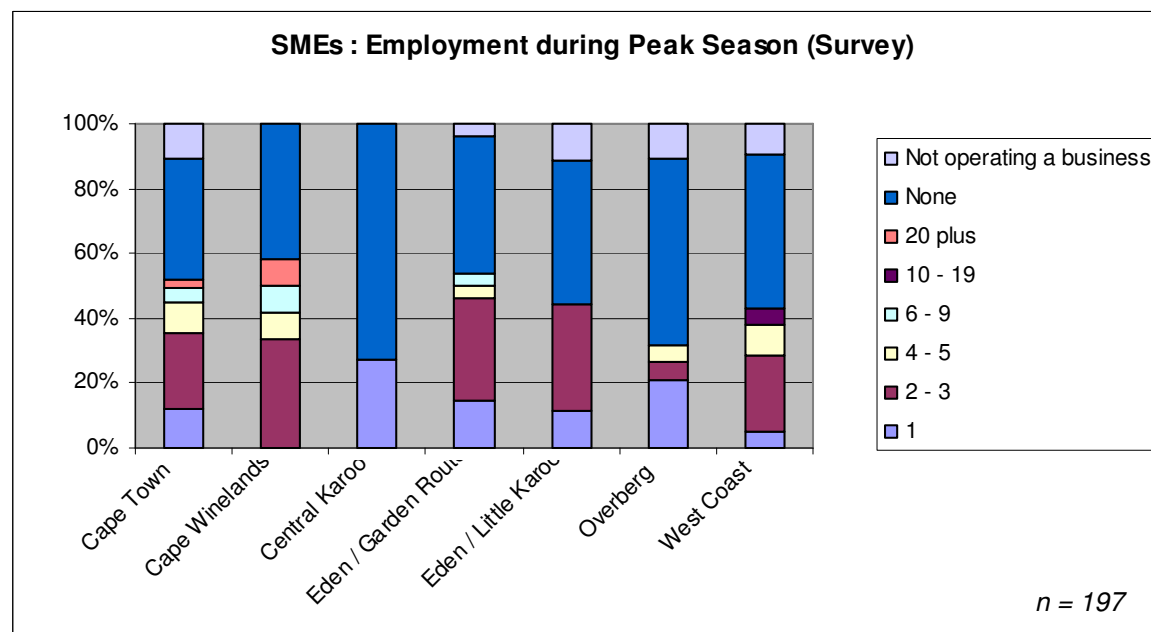


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JOB CREATION : SEASONAL EMPLOYMENT

❖ 25.7% of enterprises employ staff seasonally, mainly among direct tourism businesses.



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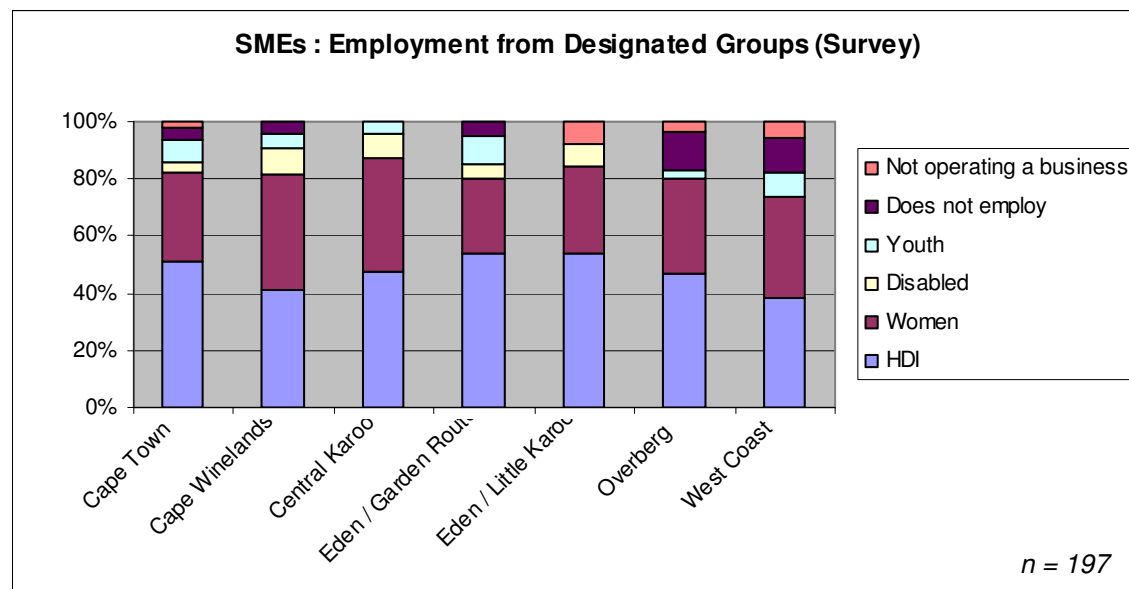


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TRANSFORMATION : EMPLOYMENT FROM DESIGNATED GROUPS

- ❖ While employment equity levels are positive, SMEs report fewer employment opportunities for youth.
- ❖ Disabled persons represent 3.7% of employees (including 2.5% disabled participants).



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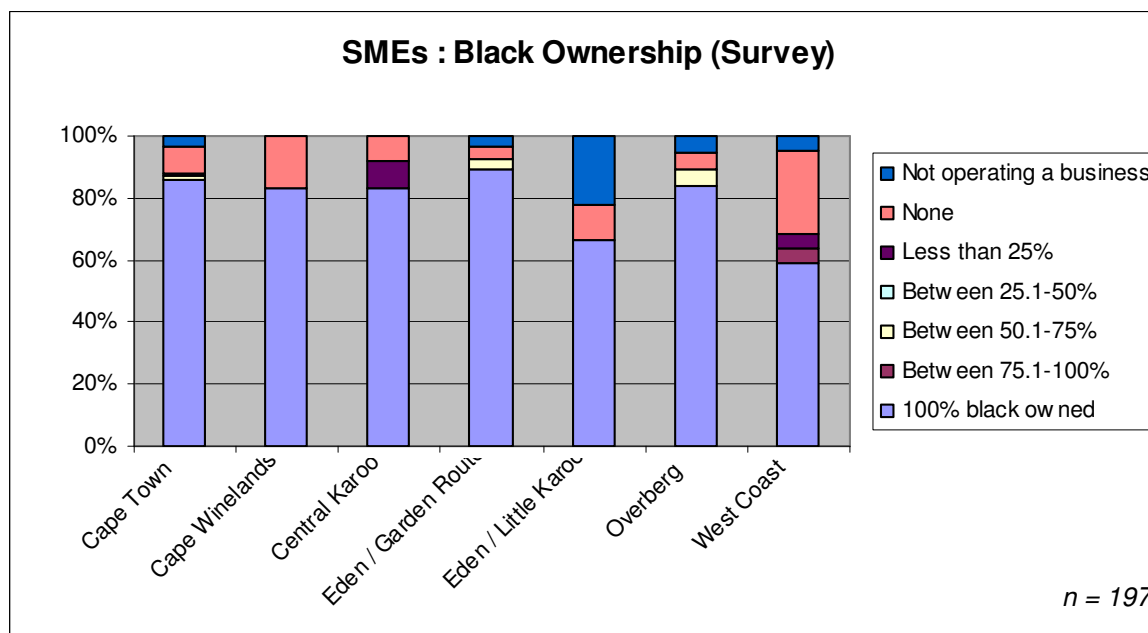


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TRANSFORMATION : BLACK-OWNED ENTERPRISE

❖ 83.8% black-owned enterprises (i.e. with equity of 50.1% of more in an enterprise)



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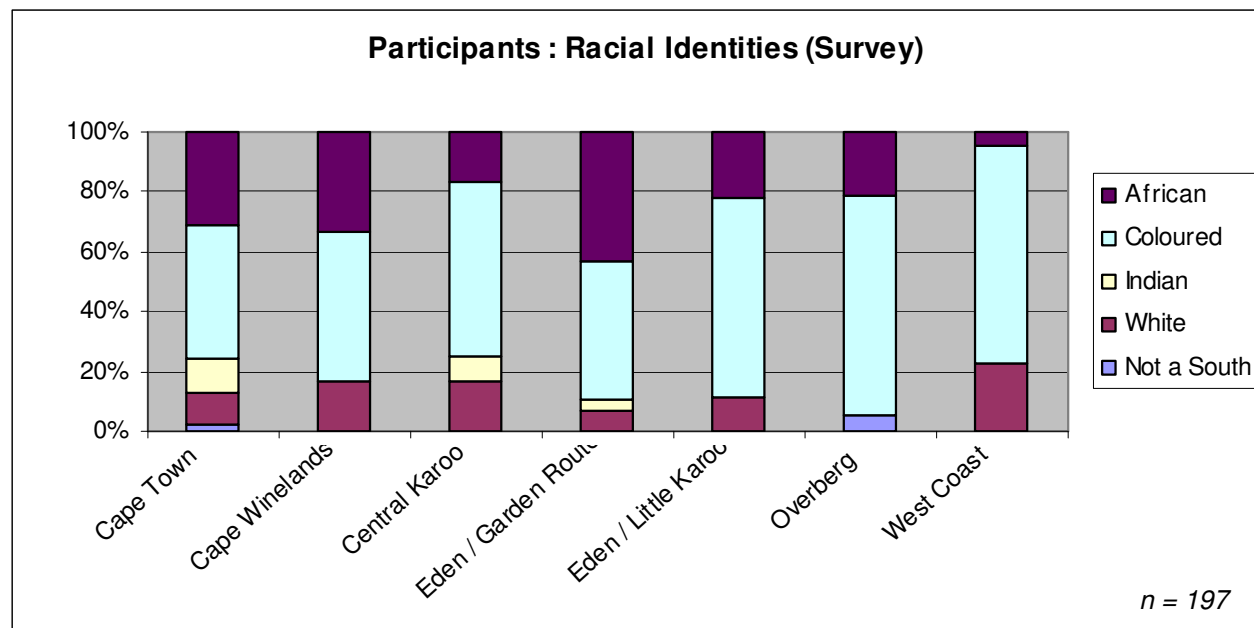


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TRANSFORMATION : HISTORICAL RACIAL CLASSIFICATION

❖ African entrepreneurs make up 27.9% of programme participants.



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BUSINESS CONFIDENCE : BUSINESS SKILLS

- ❖ 16.8% reported no business skills.
- ❖ Financial management scored among top five business skills in most regions.

Ranking	Cape Town	Cape Winelands	Central Karoo	Eden / Garden Route	Eden / Little Karoo	Overberg	West Coast
1	Computers	Communication	Strategic / business planning	Marketing	Computers	Computers	Sales
2	Marketing	Strategic / business planning	Administrative procedures	Computers	Human resource management	Administrative procedures	Administrative procedures
3	Administrative procedures	Marketing	Sales	Financial management	Financial management	Communication	Communication
4	Communication	Computers	Computers	Strategic / business planning	Marketing	Strategic / business planning	Human resource management
5	Sales	Financial management	Financial management	Administrative procedures	Administrative procedures	Marketing	Financial management

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BUSINESS CONFIDENCE : TOURISM SKILLS

❖ 23.9% reported no tourism skills.

Ranking	Cape Town	Cape Winelands	Central Karoo	Eden / Garden Route	Eden / Little Karoo	Overberg	West Coast
1	Tourist guiding	Hospitality management	Professional cookery	Hospitality management	Tourism development and planning	Tourist guiding	Hospitality management
2	Hospitality management	Tourist guiding	Customer care	Customer care	Tourist guiding	Other	Tourism development and planning
3	Customer care	Professional cookery	Other	Tourist guiding	Professional cookery	Customer care	Customer care
4	Event management	Computer systems (Galileo, booking and reservations)	-	Professional cookery	Hospitality management	Computer systems (Galileo, booking and reservations)	Tourist guiding
5	Tourism development and planning	Foreign languages	-	Destination marketing	Computer systems (Galileo, booking and reservations)	Event management	Other

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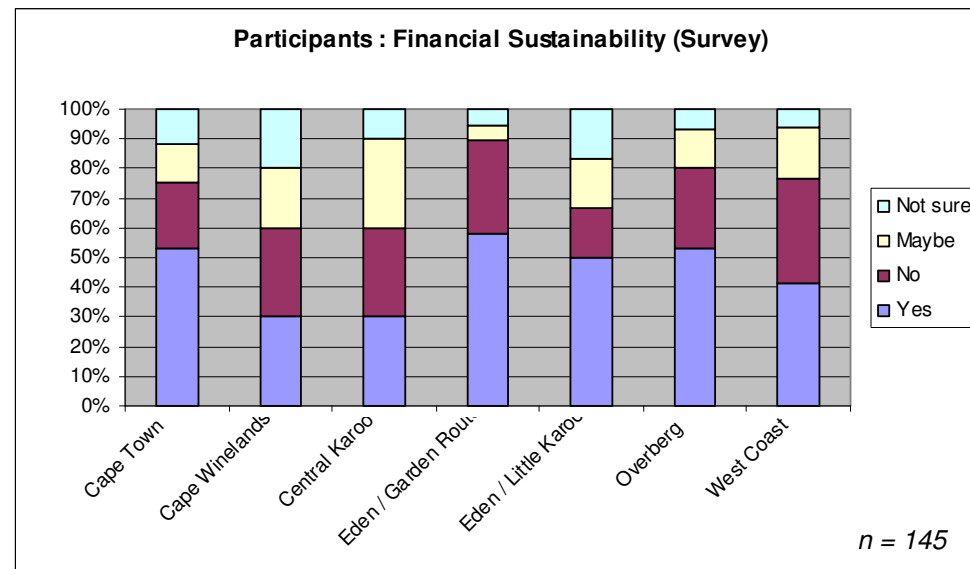


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BUSINESS CONFIDENCE : ENABLING FINANCIAL SUSTAINABILITY

- ❖ As a result of their involvement in the programmes, 36% of participants perceived an increase in their level of business confidence. This was largely due to their ability to better manage their financial independence and generate an income from the business.



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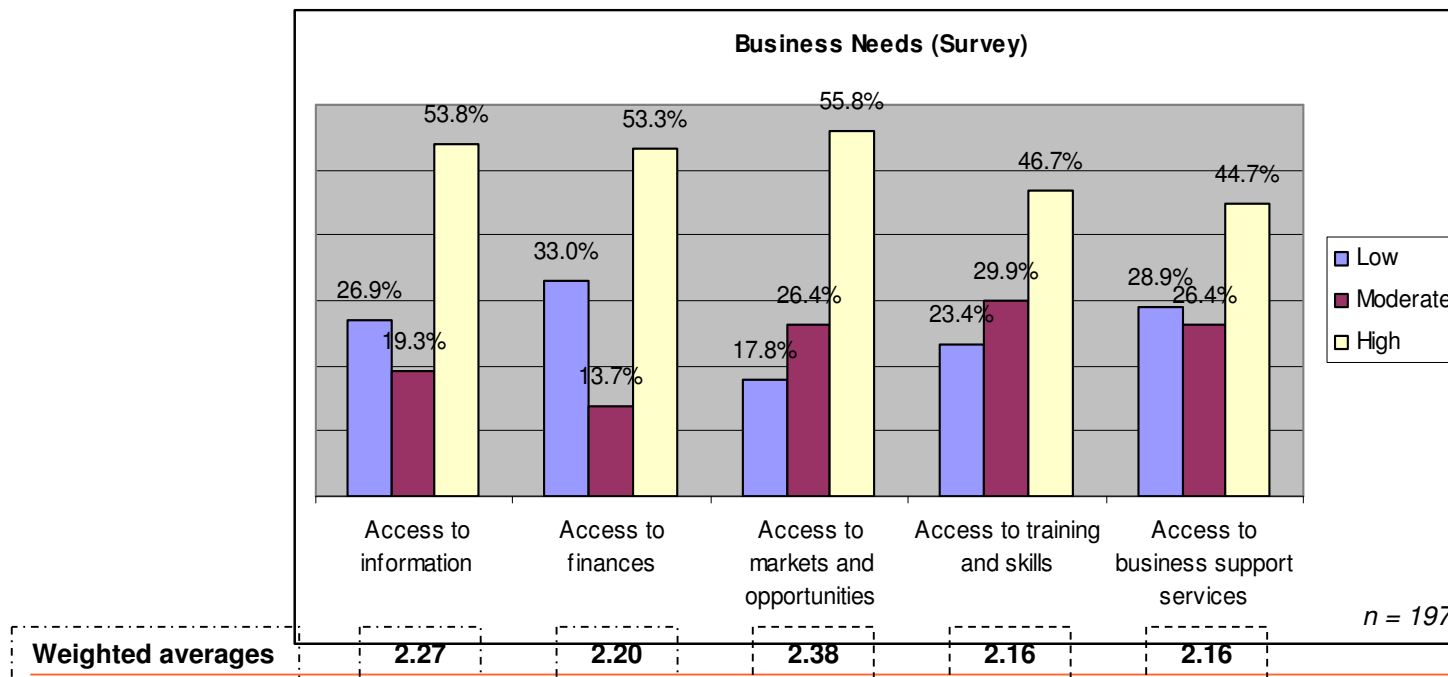


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BUSINESS CONFIDENCE : SUPPORT NEEDS

- ❖ Overall, access to markets and opportunities was the intervention need in most demand.



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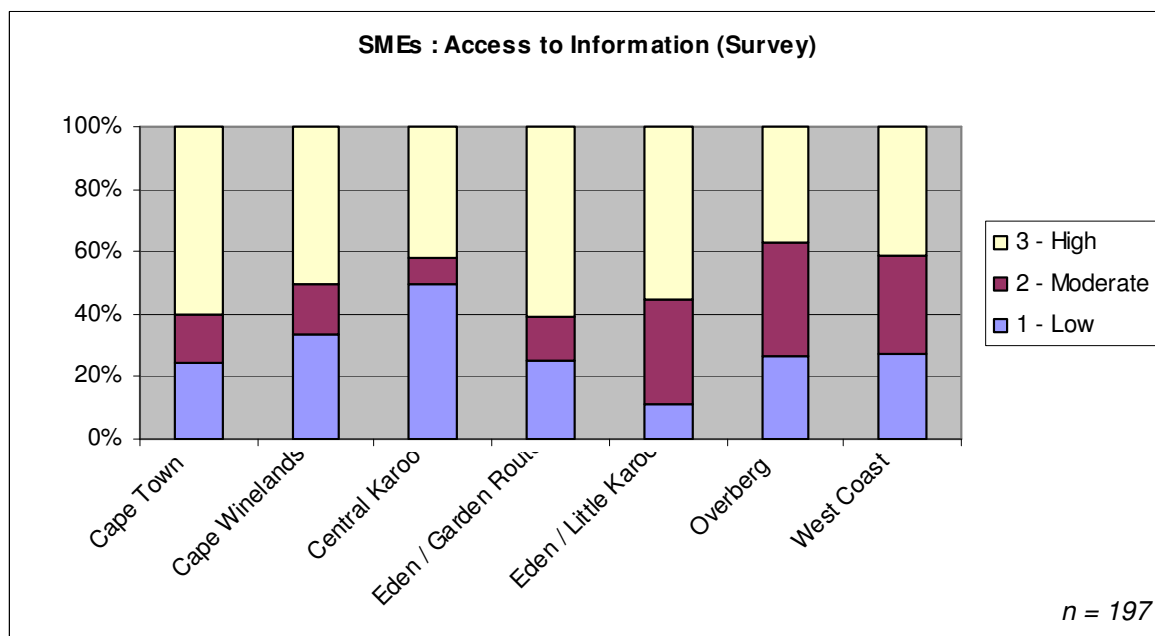


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BUSINESS CONFIDENCE : SUPPORT NEEDS – ACCESS TO INFORMATION

- ❖ Access to information support was in high to moderate demand in most regions.



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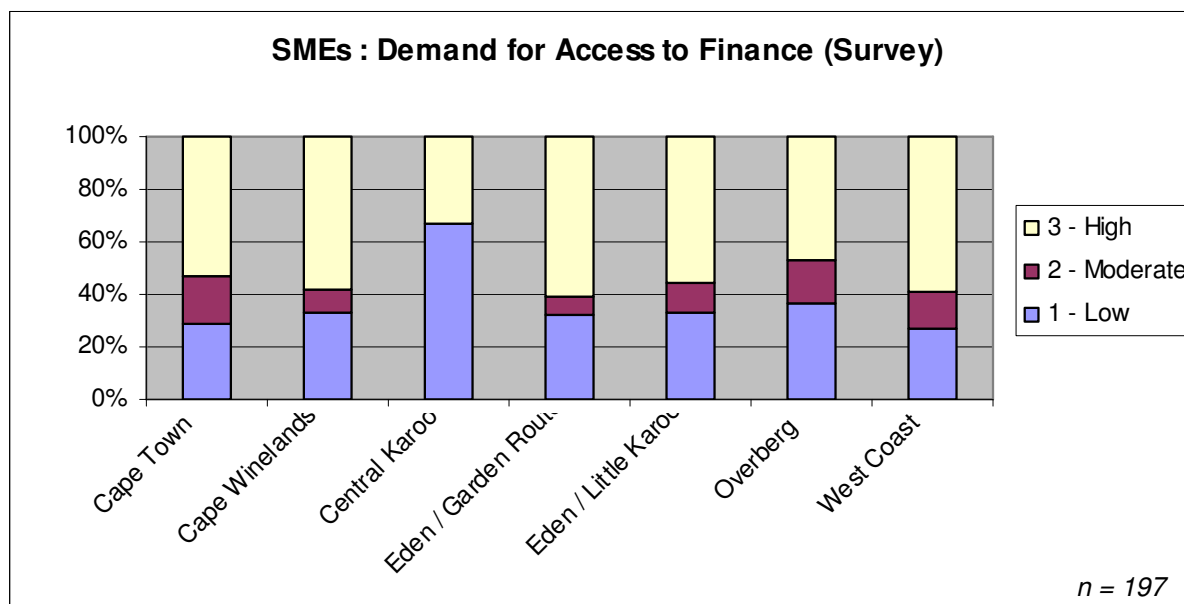


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BUSINESS CONFIDENCE : SUPPORT NEEDS – ACCESS TO FINANCIAL SUPPORT

- ❖ Access to financial support was in high demand in all regions except the Central Karoo.



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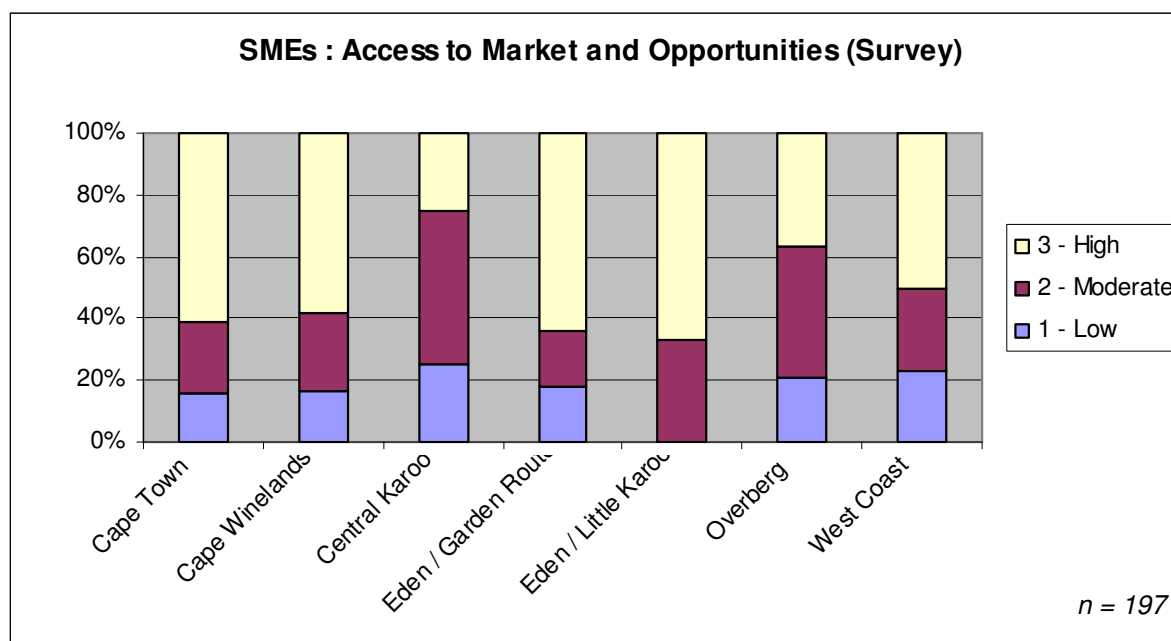


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BUSINESS CONFIDENCE : SUPPORT NEEDS – ACCESS TO MARKETS AND OPPORTUNITIES

- ❖ Access to markets and opportunities was in high demand, especially in the coastal regions.



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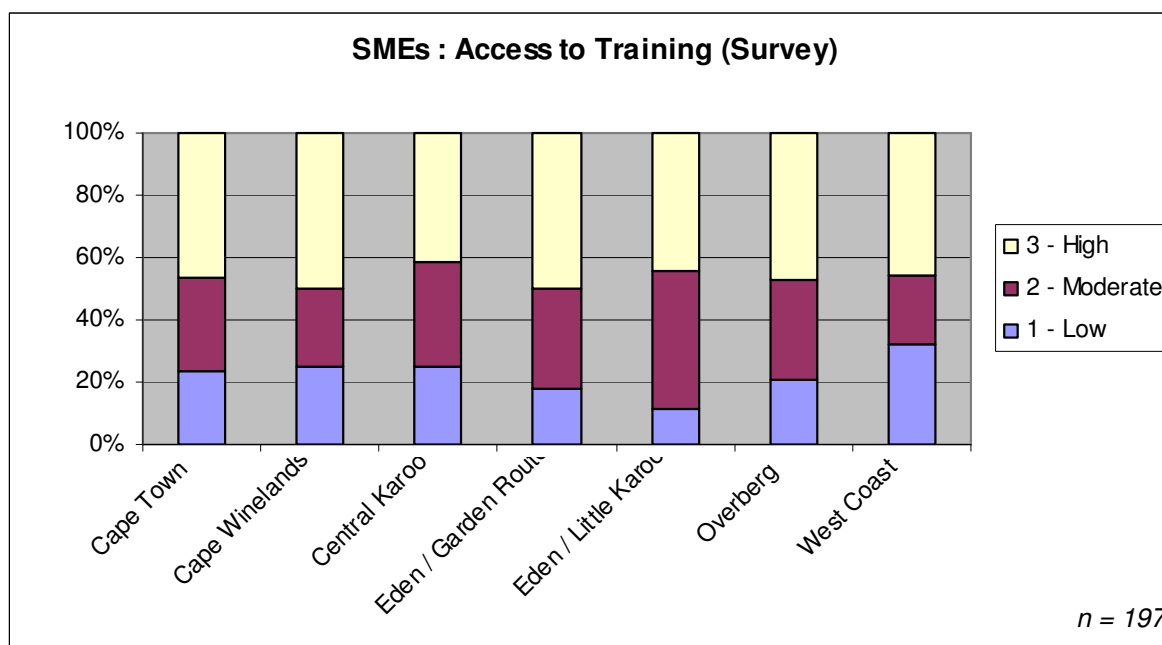


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BUSINESS CONFIDENCE : SUPPORT NEEDS – ACCESS TO TRAINING

- ❖ Access to training was in high to moderate demand across all regions.



Region	n
Cape Town	95
Cape Winelands	12
Central Karoo	12
Eden / Garden Route	28
Eden / Little Karoo	9
Overberg	19
West Coast	22

...die sleutelkwessies wat ons mense in die gesig staar: werkskepping en om armoede te beveg.
Premier Ebrahim Rasool, April 2004

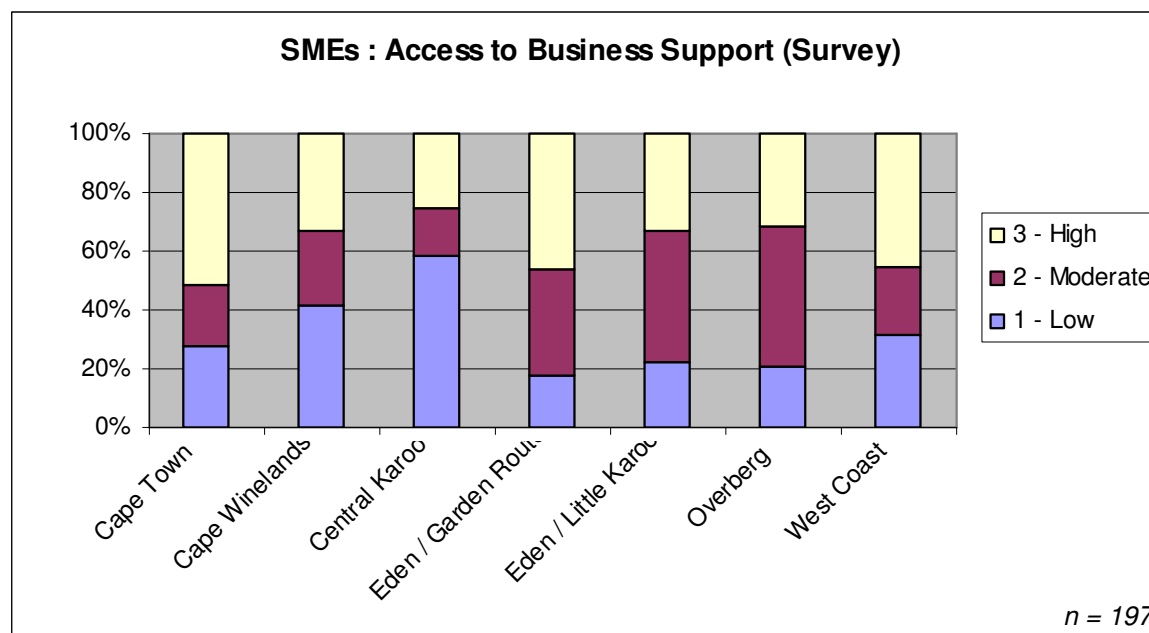


DEPARTMENT OF ECONOMIC DEVELOPMENT AND TOURISM



BUSINESS CONFIDENCE : SUPPORT NEEDS – ACCESS TO BUSINESS SUPPORT

- ❖ Access to business support was in moderate demand in most regions.



Region	n
Cape Town	95
Cape Winelands	12
Central Karoo	12
Eden / Garden Route	28
Eden / Little Karoo	9
Overberg	19
West Coast	22

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LESSONS LEARNT : INSIGHTS FROM THE 2005 STUDY

- ❖ Benchmarks have been established and are to be used to measure enterprise development and the impact of business support interventions on an annual basis.
- ❖ Programme participants are graduating from DEDT's training interventions and engaging with business support, market access and financial support interventions.
- ❖ Black emerging entrepreneurs venturing into the tourism sector and black-owned tourism SMEs are supported through DEDT's interventions.
- ❖ Some entrepreneurs can be seen as operating a business out of necessity but are providing positive role models for enterprise development as a result of DEDT's interventions.
- ❖ Capacity-building and business support interventions such as mentoring are crucial to building entrepreneurial confidence, furthering transformation within the industry, and creating opportunities.

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Premier Ebrahim Rasool, April 2004



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WAY FORWARD : 2006 AND BEYOND

- ❖ DEDT to continue to provide a channel to measure and assess the progress of black tourism entrepreneurs and development of black-owned SMEs.
- ❖ Promote entrepreneurial development by emphasizing the need for furthering education, tourism skills development and business management training as a means to build business confidence.
- ❖ Add a SME success index (measuring progress of enterprise development over time).
- ❖ Expand programme to include clients from all tourism SMEs.
- ❖ Build on DEDT's training database to include participants from other programmes.

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Premier Ebrahim Rasool, April 2004



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WAY FORWARD : 2006 AND BEYOND

- ❖ Build on current interventions with a focus on youth development.
- ❖ Unlock enterprise growth potential to stimulate job creation via interventions.
- ❖ Address seasonal employment and seek ways to creating sustainable jobs from within this labour pool.
- ❖ Further research to determine specific interventions required for necessity vs opportunity entrepreneurs.
- ❖ Further research to support DEDT policy-making by assessing the contribution of SMEs and BEE to regional economic development and job creation.

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Premier Ebrahim Rasool, April 2004



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FURTHER INFORMATION

- ❖ The final report and regional fact sheets are available electronically.
- ❖ To download these documents go to www.capegateway.gov.za/tourism_business or www.capegateway.gov.za/eng/pubs/reports_research/E/127891.
- ❖ Further questions to be directed to yfifire@pgwc.gov.za.

THANK YOU

...die sleutelkwessies wat ons mense in die gesig staar: werkskepping en om armoede te beveg.
Premier Ebrahim Rasool, April 2004

