

# Policy Brief: The potential of tourism for economic diversification of the Mpumalanga Coalfields

## OVERVIEW

Tourism in the Coalfields region of Mpumalanga is relatively undeveloped, other than business tourism associated with the mining, energy generation, agriculture, and associated industries. Given the current interest in diversifying the economy, this policy brief reviews the state of tourism in the area, lessons from post-mining tourism elsewhere in the world, and potential development pathways for tourism in the Coalfields.

## INTRODUCTION

Research into tourism's potential to support economic diversification of the Coalfields of Mpumalanga forms part of a wider four-year JUST SA program. With the planned decommissioning of Eskom coal-powered generators in the region, alternative economic opportunities in this area must be supported, where feasible.

Employment in the coal value chain – including coal mines, Eskom power generation, petrochemical production and small coal truckers – exceeds 120 000 workers (Patel, Makgetla and Maseko, 2020), and the South African coal value chain is highly localised to a handful of local municipalities in Mpumalanga. eMalahleni is the most vulnerable of the municipalities while Steve Tshwete local municipality is less exposed due to a higher adaptive capacity (World Bank, 2024).

## Why tourism?

**Recreation is a land use often associated with post-mining sites.** In South Africa, intensive and non-intensive recreation are recognised post-mining land uses, together with agriculture and forestry (Cole, et al., 2024). Globally, post-mining sites often also include recreational use, in the categories of “community and culture” such as cultural/historical precincts, reclamation art, museums or exhibitions of mining/industrial history, and community event spaces; and “non-intensive” recreation, encompassing park and open green space, public/botanical gardens, paths for walking, hiking, running, cycling and horse-riding and eco-tourism. There are also examples of mine sites repurposed for intensive recreation – ski slopes, dives, sites, motocross races, and the like.

Recreational assets are used by tourists and residents alike for leisure purposes. Both tourists and local visitors partaking in recreation will be important markets for tourism businesses in the Coalfields Region.

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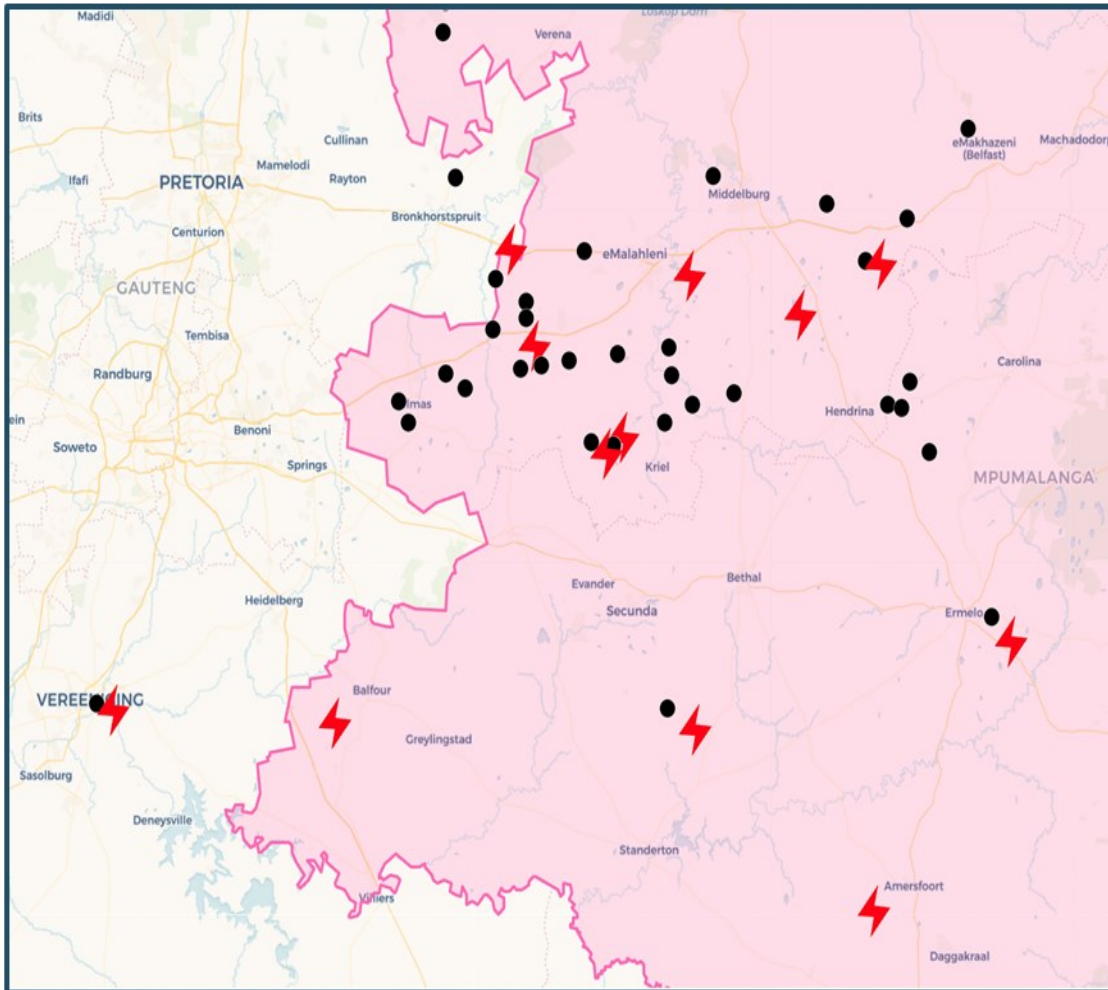
TIPS supports policy development through research and dialogue. Its two areas of focus are trade and inclusive industrial policy; and sustainable development.

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**Figure 1: Location of the Mpumalanga Coalfields**



Source: Adapted data from Eskom via The Outlier. Data as of April 2024.  
<https://roadtojet.theoutlier.co.za/focus/mpumalanga>

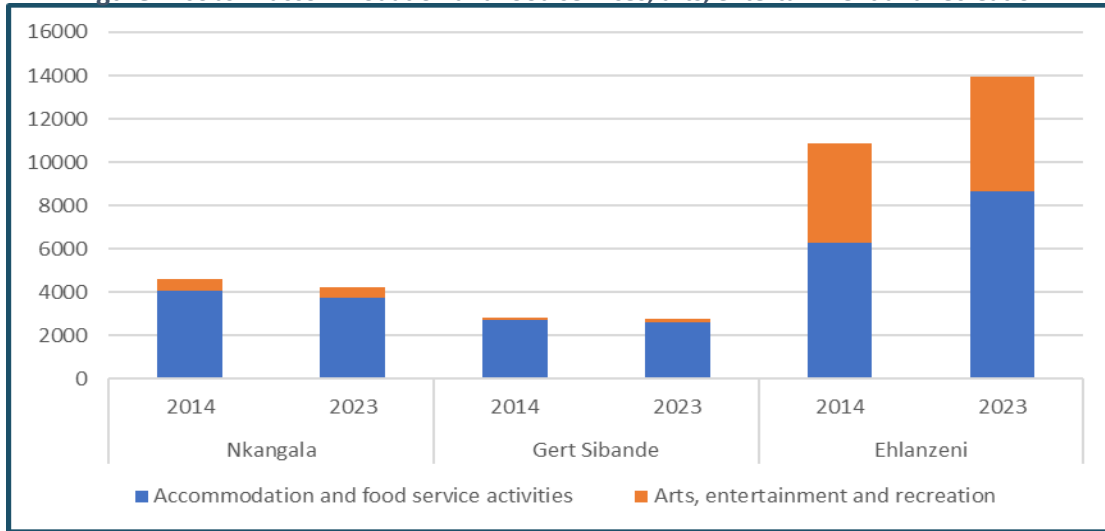
**Tourism is a major, labour-intensive economic sector.** In 2022, Tourism’s contribution to South Africa’s Gross Domestic Product (GDP) was 3.5%, close to its 3.7% share of 2019 (pre-COVID). For the country as a whole, in 2022, 773 385 persons were directly engaged in producing goods and services consumed by visitors, or 4.7% of all employment, a strong recovery of the 2019 jobs number of 777 686 (Statistics South Africa, 2024).

At the provincial level, in 2022, tourism jobs were estimated to contribute between 4.2% and 4,7% of all jobs in the province (Mpumalanga Department of Economic Development and Tourism, 2020)<sup>1</sup>. One estimate puts tourism’s provincial labour intensity as high as 4.73 jobs per R1 million of economic output (Genesis, 2024).

At the district municipality level, local spatial economic data indicates that only Ehlanzeni district – which is outside of the Coalfields – has a significant number and share of jobs in “hotels and restaurants” and “arts, entertainment and recreation” (two of the main tourism characteristic industries), with just under 14 000 jobs or 7% of total, together, in 2023. Tourism is a relatively small part of the local economy in the districts of Nkangala and Gert Sibande, where mining, and other industries dominate (see Figure 2) (National Treasury, HSRC, Cities Support Programme, 2024).

<sup>1</sup> The lack of a precise figure for provincial GDP and jobs is a result of the tourism sector comprising a wide-range of industries that provide goods and services to tourists –from accommodation, to food and beverages, transport, activities, intermediaries, and some retail. This diffusion of tourism income and employment across industries makes it difficult to identify all of the impacts of the sector, including the vulnerable groups and communities involved in the sector (TIPS, 2020).

**Figure 2: Jobs in accommodation and food services; arts, entertainment and recreation**



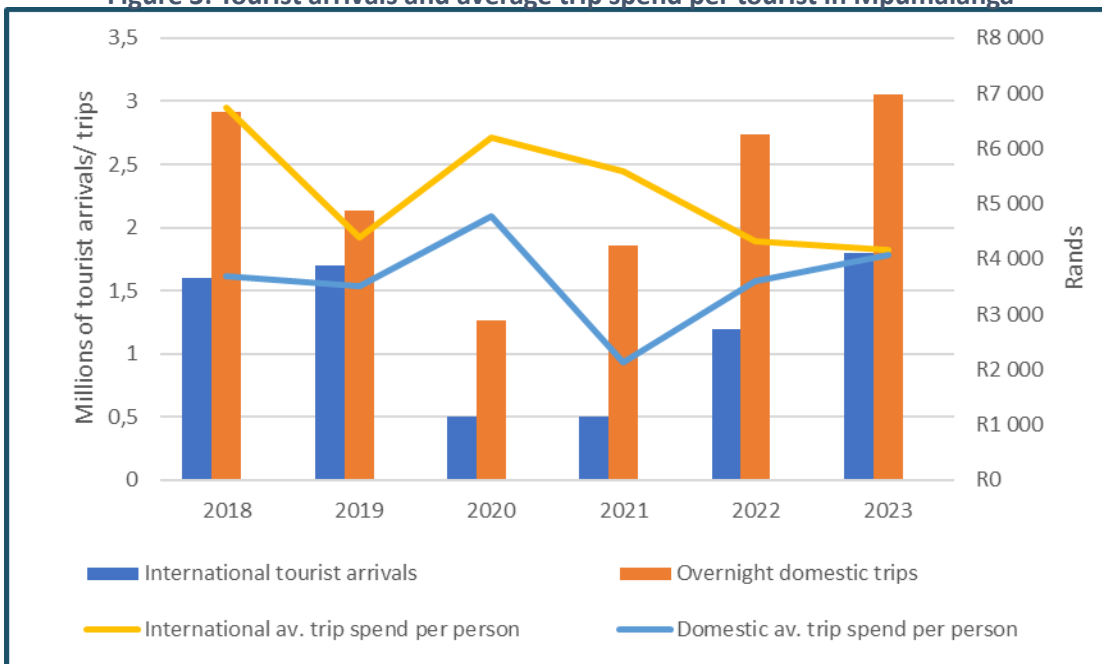
Source: National Treasury, HSRC, Cities Support Programme, n.d.

**Part of tourism’s economic appeal to development planners is that it can support rural development and presents opportunities for small, medium and micro businesses (SMMEs).** Also, tourism employs relatively more women and young adults than other sectors, although some tourism work can be precarious, at least in part due to its seasonality, and informality (Rivett-Carnac, 2022). In 2022 56% of all accommodation jobs around the country were in micro-enterprises (Statistics South Africa, 2022). Furthermore, the 2020 National Employment Vulnerability Assessment Sector Jobs Resilience Plan for Tourism recognises tourism as an “at risk” sector from climate change. It notes the severe impact this could have on low-income workers, small businesses and communities (TIPS, 2020)<sup>2</sup>.

### MPUMALANGA’S TOURISM CHARACTERISTICS

**In 2023, Mpumalanga’s foreign tourist numbers rebounded from COVID, largely driven by growth in tourists from Mozambique and eSwatini.** Overseas tourist numbers were still slightly below 2019 levels. Regional tourists usually stay with friends and relatives, and their average trip expenditure per day is low compared with overseas tourists. For this reason, although Mpumalanga receives more foreign tourist arrivals than the Western Cape, the average expenditure per foreign tourist per trip in Mpumalanga is one-quarter of the Western Cape’s (South African Tourism, 2024).

**Figure 3: Tourist arrivals and average trip spend per tourist in Mpumalanga**



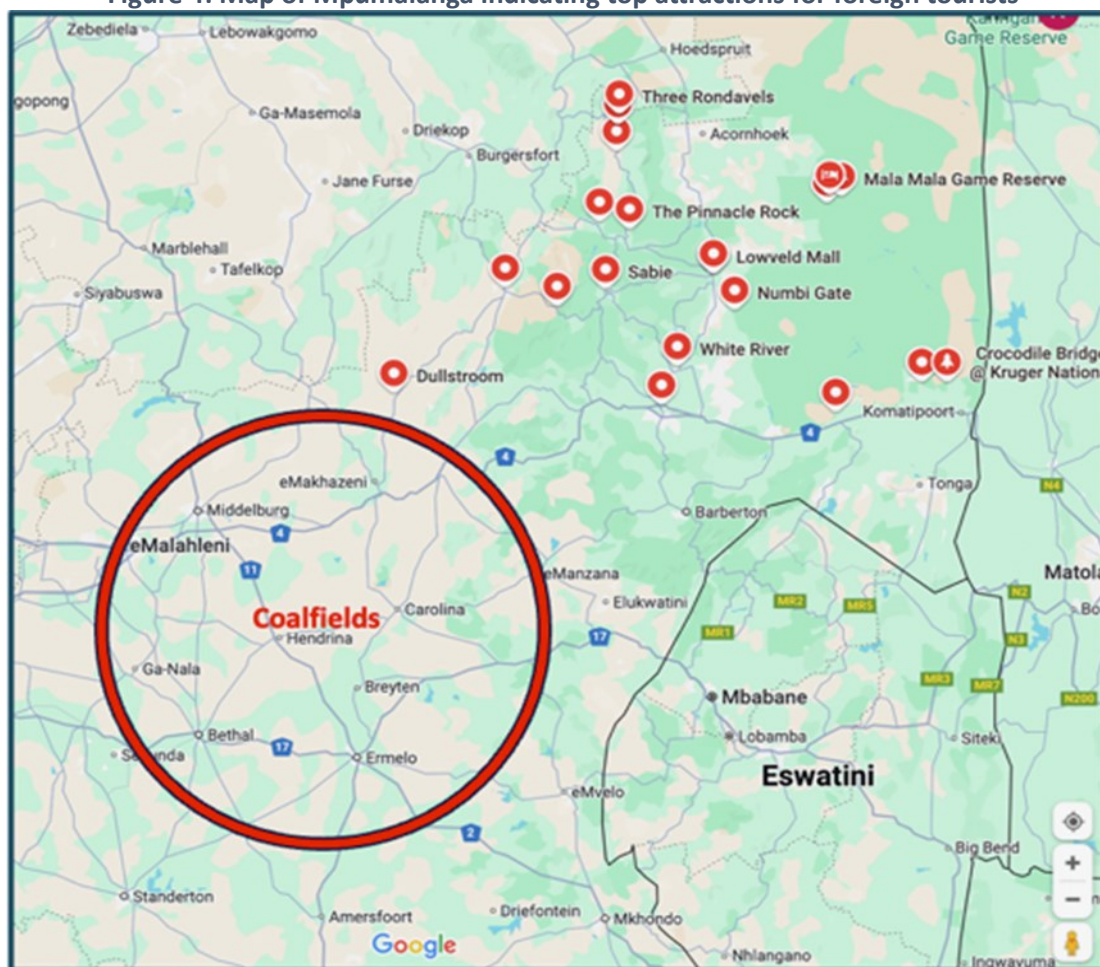
Source: South Africa Tourism 2024.

<sup>2</sup> An updated Sector Jobs Resilience Plan for Tourism is being developed as a related and complementary report to this one.

Domestic tourism to Mpumalanga also recovered in 2023, particularly holiday and business tourism, possibly in response to the end of COVID. Overnight domestic tourist trips reached three million with 38.5% of all domestic tourists to Mpumalanga originating in Gauteng, 21% in Limpopo and 33% in Mpumalanga itself. Domestic tourism is a more important market for trip numbers than foreign tourism (South African Tourism, 2024). The vibrancy of the domestic market is demonstrated by the strong performance of the Graskop Gorge Adventure Centre which has to date received more than one million visitors, and close to 200 000 tourists in 2024 alone, most of whom are domestic, and from the province (Pilane, 2025).

**Mpumalanga’s top attractions for foreign tourists have remained the same for many years. In 2023, more than 80% of surveyed tourists visited the Southern Kruger National Park** with all other highly visited attractions also found in the Ehlanzeni district, in the East of the province, and outside of the Coalfields (South African Tourism, 2024).

**Figure 4: Map of Mpumalanga indicating top attractions for foreign tourists**



Source: Author adaptation of Google Maps with South African Tourism data.

Less is known about where domestic tourists travel, with their destinations likely more dispersed given that much of it is to visit friends and relatives (VFR).

**Mpumalanga Tourism and Parks Agency (MTPA) is spearheading several projects** at its nature reserves including major plans at Loskop Dam and its surrounds through a 25-year agreement with the Aspinall Foundation (Mpumalanga Tourism and Parks Agency, 2024).

**MTPA’s 2024 marketing strategy for the province and the 2023 Nkangala investment promotion strategy both identify potential market segments (by interest or theme) based on existing clusters of sites.** Business tourists, indigenous and heritage routes, families, and sports enthusiasts are identified as the priority market segments for the Coalfields (Mpumalanga Tourism and Parks Agency 2024; Nkangala District Municipality, 2023). The Nkangala investment strategy also identifies specific project development opportunities such as the development of Witbank, Middelburg and Vaalbank Dams; refurbishments to the Loopspruit Winery and cultural centre; redevelopment of the Steven Tshwete Cultural centre; and development of rock climbing at Waterval Boven (Emgwenya) (Nkangala District Municipality, 2023).

## COALFIELD'S TOURISM CHARACTERISTICS

A limited number of in-depth interviews with accommodation and non-accommodation tourism and related firms<sup>3</sup> indicate the following characteristics.

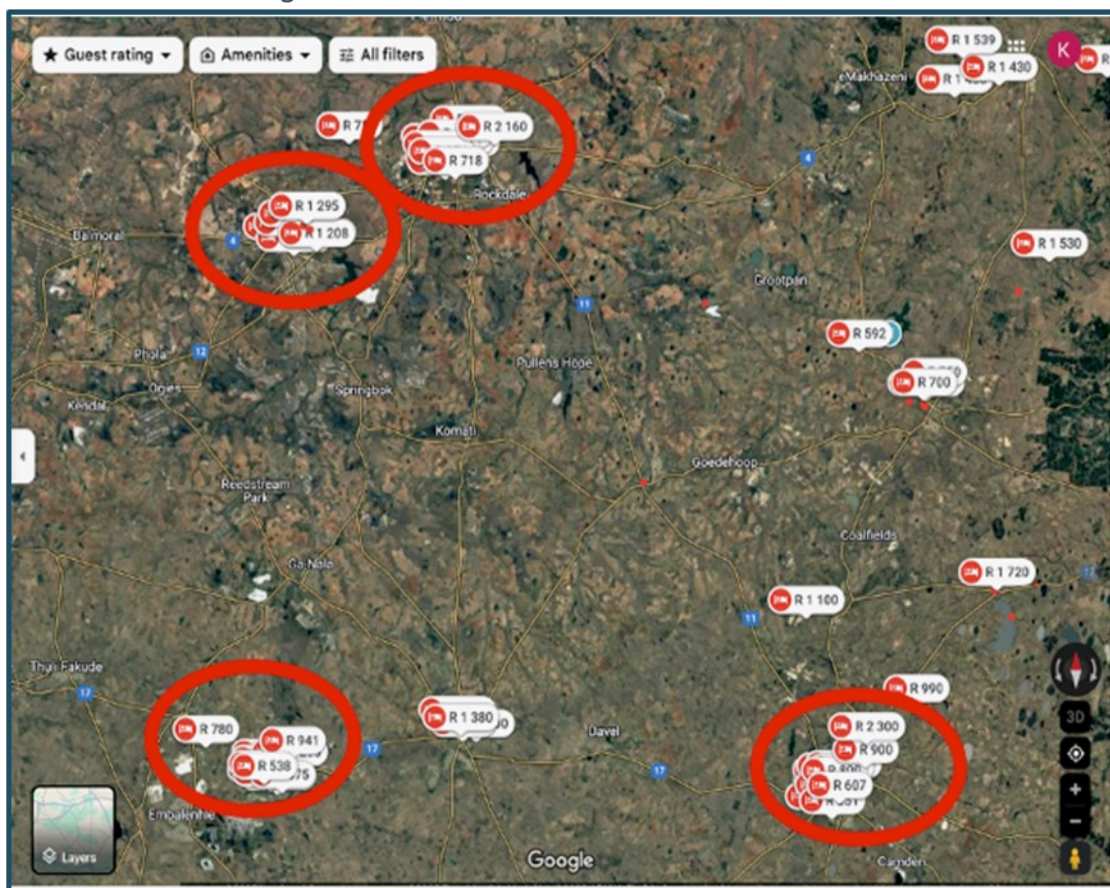
**Business tourism is the main market across the Coalfields**, with Secunda relying heavily on business travel related to Sasol. Emalahleni and Middelburg receive business tourists across industries and the government. So, too, does Ermelo.

**In the east of the Coalfields, Ermelo and Chrissiesmeer attract several niche leisure markets**, including self-drive foreign tourists, domestic wedding tourists, and other event tourists. These towns have cultivated a series of small-scale, mainly local and domestic tourism events.

**In terms of endowments, the area around the Coalfields has many cultural heritage sites, but while these are the focus of tourism strategies, they are not well developed, maintained, or marketed for tourist use.** Furthermore, while popular with some locals, the nature reserves and dams are not readily accessible to tourists seeking activities. Few experiences at the dams are bookable by tourists not staying in accommodation on the dams<sup>4</sup>. Events are held routinely, many small-scale — and sometimes larger-scale — particularly around Loskop, Witbank and Middelburg dams. Several guest lodges and facilities exist at the dams, mainly used by locals and domestic tourists who participate in fishing and boating.

**The main accommodation clusters exist in and around Emalahleni, Middelburg, Secunda and Ermelo.** This was confirmed using a booking.com datascraper (Apify), which allowed for the total number of establishments to be identified by location.<sup>5</sup>

Figure 5: Accommodation clusters in the Coalfields



Source: googlemaps.com; accessed 4 February 2025 Source: Landsat/Copernicus.

<sup>3</sup>(Besuidenhout, 2025); (Petersen, 2025); (Luddick, 2025); (Vuuren, 2025); (Nyathi, 2025); (Horsley, 2025); (Siderski, 2025); (Louw, 2024); (Ott, 2024); (Botha, 2024); (Grimbeeck, 2024); (Ntungwa, 2025); (Pilane, 2024)

<sup>4</sup>The Loskop dam has more activities and adventure-based experiences than Emalahleni and Middelburg dams.

<sup>5</sup>This should not, however, be considered comprehensive nor definitive, as the definitions of accommodation categories, and delineations of the towns for booking purposes, are unclear within the search function. Nonetheless, it confirms the dominance of Emalahleni, Middelburg, Ermelo and Secunda as the major accommodation clusters of the Coalfields. Accommodation operators were interviewed in each of these main accommodation clusters.

**Table 1: Accommodation supply, Coalfields, November 2024**

TOWN	MAJOR ATTRATIONS*	TOTAL	HOTELS	GUEST-HOUSES	OTHER	COMPLETED INTERVIEWS
<b>Emalahleni</b>	Emalahleni/ Witbank Dam The Ridge Casino Fishing	58	9	26	23	2 (1 x hotel; 1 x guesthouse)
<b>Middelburg</b>	Corn & Cob Middelburg Dam Fishing	47	6	28	13	2 (1 x hotel; 1 x nature re- serve;)
<b>Ermelo</b>	Agri – and wedding tourism South African war sites	44	1	21	22	1 (guesthouse)
<b>Secunda</b>	Lake Umuzi waterfront Graceland Casino	35	2	20	13	1 (hotel)
<b>Standerton</b>	Grootdraai dam and fishing	11	2	9		0
<b>Bethal</b>	Nomoya Masilela museum; statues	3	0	2	1	0
<b>Belfast/ Emakhazeni</b>	Proximity to agritourism/ nature tourism Dullstroom and surrounds	5	0	3	2	0
<b>Chris- siesmeer</b>	Wetland eco- system and biodiversity; heritage houses; fishing	4		2	2	1 (guesthouse)

Source: Author based on Apify, 2024. \*Author's view.

**Most of the accommodation is provided in guesthouses, particularly outside of the major business towns of Emalahleni and Secunda where a number of branded hotels operate.** Notable branded hotels include Anew hotels with two properties in Emalahleni and Tsogo's Sun's The Ridge Casino and Hotel; and Peermont's Graceland Hotel at Secunda. The budget to midmarket hotel group Khayalami has properties across the coalfields – in Secunda, Standerton, Ermelo, and Emalahleni. Dream Resorts operates Olifants River Lodge. Smaller independent hotels also exist, as do large guesthouses. A (reputedly) 5-Star hotel has been developed in Middelburg but is not yet operational.

**In all the towns, restaurant and food serving options are limited and typically only comprise major branded offerings and franchises,** such as Spur, Panzarottis, Ocean Basket, Pedros, and similar.

**For attractions and activities, Ermelo and Chrissiesmeer offer several leisure experiences.** Chrissiesmeer hosts small-scale events to celebrate different aspects of the biodiversity, such as the frogs, herons, flamingos and wild flowers. Randell's Ranch museum is the largest museum of tractors in Africa, and is located 50km northeast of Ermelo, in Lothair, just south of Chrissiesmeer. Close by is the Toldiera resort, which holds a major annual music concert, Mieliepop, in March each year over three days.

**The dams across the Coalfields are the major sites of recreational activities, with angling and boating popular among resident populations and visitors.** Hunting is popular in parts of the province too, albeit a niche market, with wind shooting (bird hunting) in certain areas. Delmas, Middelburg, Amersfoort/Ermelo all have inspected properties where wind shooting is permitted.

**Botshabelo, just north of Middelburg, used to be a popular stop for groups and Little Elephant sold crafts to groups, but these sites are no longer operational.** Corn & Cob has captured part of the tour market, which stops for lunch and a visit to the recreated Ndebele Village on site. Where foreign tourists in groups visit the Coalfields, it is nearly always for a lunch stop en route to Kruger, with very few spending one or more nights in the area.

**Emalahleni, Steve Tshwete, and Msukaligwa all score high on their agglomeration characteristics in the diversity of their industrial and skills bases, and domestic market access.** Emalahleni and Steve Tshwete score high on population density too – in the top 20% nationally. Govan Mbeki is where Secunda and Bethal are located, and its agglomeration factors are also strong, although these towns score lower on “proximity to protected areas” and “water infrastructure” than the others (World Bank, 2024).

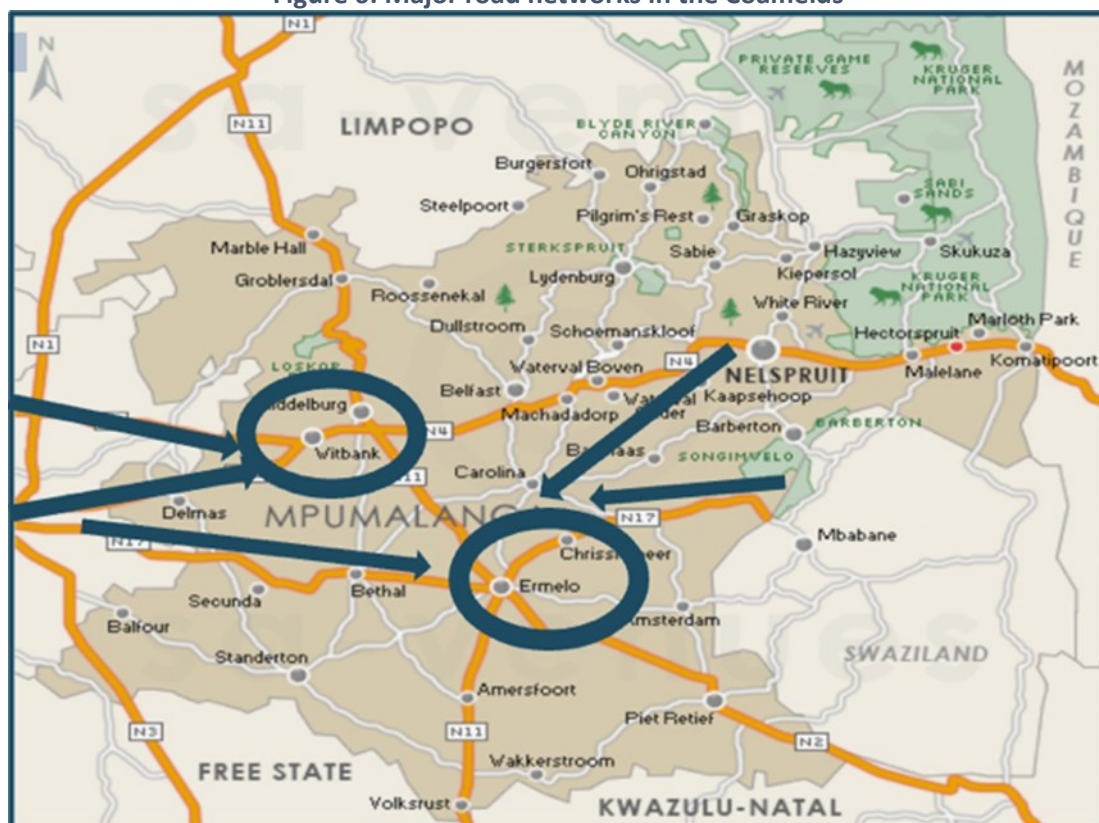
**Illegal mining is a significant challenge that brings safety and security risks to the region as a whole.** One establishment indicated they have had to increase security on site due to illegal miners in the vicinity of their operations. A further mining-related challenge relates to competition for land between tourism and mining. In certain instances, nature reserves and other businesses in more rural parts of the Coalfields have taken legal steps to stop mining applications close to their properties.

**Pollution of water sources – lakes, dams and rivers – is a deterrent to tourism and harmful to the ecosystems of the area** (Cole et al., 2024). Air pollution is also a major detractor, and so too is the aesthetic impact of the mines and major power plants, visible on most national roads and omnipresent in the environment. This is a core challenge facing leisure tourism development.

**Infrastructure services could be enhanced in certain places,** particularly where the roads are poor and limit tourist access to major sites and facilities. Some accommodation establishments have back-up generators and water tanks to ensure their operational water and energy security. But this comes at a cost, particularly for small firms.

**The tourism firms spread across the region undertake different levels of coordination between themselves and government.** Discussions indicate little evidence of dynamic partnerships between the industry and government at the local level. Some partnerships exist with mines, but this also appears to be limited. In a few instances protected area custodians are investigating the potential for biodiversity offsets as a source of green finance. Once rehabilitated, previously degraded and polluted land and water from mining may present certain opportunities for recreation.

Figure 6: Major road networks in the Coalfields



Source: Source: Adapted from SA-Venues.com

## TOURISM AS A SOURCE OF ECONOMIC DIVERSIFICATION POTENTIAL

### A locational advantage

Tourism destinations that are close to large population centres can leverage locational advantage. The Coalfields has significant locational strengths given the presence of the N4, N12 and N17, which connect Gauteng with Mpumalanga, Eswatini and Kruger National Park, a globally renowned national park with over two million visitors each year. Gauteng is home to about 15 million people and is the richest province, and the Coalfields' proximity to Gauteng's residents and businesses creates opportunities for leisure and business tourism alike.

### Current and underserved markets

Table 2 summarises insights into the various market segments. It indicates possible experience gaps which warrant further, more formal investigation.

**Table 2: Market segmentation and indicative experience gap identification**

Market segments by origin and main visit purpose)	Booking and information channels	Purpose of existing trips/ stops in coalfields	Major considerations	Existing experiences	Experience gaps	Benchmarks
<b>FOREIGN</b>						
Long-haul holiday market: coach tours	Destination management companies	Stop over en route to Kruger	Short stop – a few hours at most.  Fits interest, price points and timing of tour schedules.	Corn & Cob  Botshabelo used to attract coaches but is in disrepair; Little Elephant burnt down.	Compelling cultural/ community/ heritage experience  Good craft and design  Mining museum mooted in Emalahleni IDP	Cultural attractions: Khwattu Battlefields Apartheid museum  Craft and Design: Watershed, V&A Rosebank Market
Long-haul holiday market: Self-drive	Direct	En route to Kruger; En route from Kruger to Northern KwaZulu-Natal	Anchor attractions, Consumer reviews, social media, interests, budget, time; online booking platforms	Chrissiesmeer and Ermelo are en route Kruger to Emalahleni, but only feature as an overnight layover	Exemplary local food offerings Retail Major/ anchor attraction/s Appropriate stopover destinations	Destination wine estates Wine route
SADC: Self-drive	Direct	VFR, personal and business shopping tourism; medical; educational	Recreational activities, shopping and family socialising is key	Shopping malls, schools, medical facilities, some recreational activities	Not clear: More recreational activities for families; shopping; markets; entertainment	Hazyview Mall

Market segments (by origin and main visit purpose)	Booking and information channels	Purpose of existing trips/ stops in coalfields	Major considerations	Existing experiences	Experience gaps	Benchmarks
<b>DOMESTIC</b>						
Gauteng: leisure trips	Direct	Weekend events (weddings; sports), VFR, recreational (fishing, golfing groups, etc.)	Awareness Appeal Cost Quality Distinctiveness	Ermelo wedding activities.  Chris-siesmeer heritage, biodiversity, nature based events and location.  Fishing, golfing, hunting	Witbank dam meander – by water  Improve dam based water experiences around Chris-siesmeer  More experiences around	Dullstroom Wakkerstroom Clarens  (rural tourism clusters)
Gauteng: business trips	Direct, by company booking agents, in-house and corporate travel agents	Contractors; Business meetings	Budget Location Amenities at accommodation	Preferred guest-houses	Recreational experiences	Sandton Rosebank
Gauteng: Meetings Conferences and Exhibitions	Either internal to company or Professional Conference organisers.	Meetings, conferences, exhibitions	Time Cost Flexible packaging Sufficient accommodation capacity Proximity	Hotels and guesthouses accommodate in house events	Team building facilities and add-on experiences	Magaliesburg / Muldersdrif examples for Gauteng market
Provincial: leisure/ recreational trips	Direct	Visits to friend and relatives Eating out Hunting Angling Adventure	Cost Appeal Accessibility Quality	Dams, malls, casinos	Adventure and activity based tourism; more events.	Graskop Gorge Dullstroom Loskop Dam
Residents of major towns seeking local recreation	Direct	Recreation/ leisure	Cost Appeal Quality, Accessibility	Dams – fishing, boating, etc.	Farmers markets Dam based recreation	Bryanston market Midmar Dam

Source: Author 2025.

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### **Development pathways for tourist diversification**

Tourism cannot replace coal mining, but it can be part of the economic reorientation of the Coalfields Region, and support new small and medium-sized enterprises (SMEs), creating new clusters of development and increasing employment. Not only can it do so, but its reorientation becomes critical given the reliance of many existing accommodation firms on guests involved in coal and associated industries. This reorientation requires that tourism diversify from business tourism into leisure and other types of tourism.

**In the face of the coal phase-out in the Coalfields as a major trigger event, to unlock the potential of tourism, the agency of tourism actors should be reinforced.** This is a fundamental requirement to help shift the tourism development pathway towards a new, more dynamic direction, which is more job-creating. To realise this, tourism potential needs to be unleashed through linking market opportunities to particular spaces where endowments, infrastructure, destination characteristics, and agglomeration are sufficiently present. Two approaches are possible:

- *An SME cluster-upgrading approach, which, through targeted support, could leverage existing market demand and tourism SME efforts to upgrade the overall cluster, creating compelling destinations.*
- *An anchor investment approach, which could prioritise interventionist investments in a major attraction, or more than one, to significantly pull in tourists, including from market segments not currently served.*

SME cluster tourism develops largely through the work of private sector entrepreneurs in organised member-driven associations that support collaborative action. Anchor investments are often government-led at the outset, where initial catalytic and large-scale investments are publicly financed. As indicated in the case studies of European post-mining tourism, described in the section on Lessons for the Coalfields, after initial public funds, “bottom up” private sector initiatives have assisted in cementing a diversity of destination experiences through place-making. The two approaches are accordingly not mutually exclusive.

#### **SME cluster upgrading**

##### Emalahleni and Steve Tshwete: Investing in the dam experience

A possible point of departure here – and also recognised in the marketing and investment strategies for the region – involves improving the recreational experience at the major dams, particularly Witbank or Emalahleni Dam and Middelburg Dam. The 2020 – 2025 Emalahleni tourism strategy calls for the Emalahleni Resort (Witbank Dam), a municipal resort, to be revitalised and developed into fully operating establishments through a Public Private (Emalahleni Local Government, 2020). While this might be a priority, investment in experiences is key to driving destination creation.

Emalahleni and Middelburg already have strong business tourism markets, some major leisure events, and tourists visiting friends and relatives. They also have large resident populations. Improved experiences on the dams warrant further investigation, feasibility studies, planning and design. For example:

- A dam cruise which visits the various lodges on the banks of the dam.
- A dam cruise combined with wildlife viewing in the Emalahleni nature reserve.
- A pedestrian/ non-motorised route that can be walked/ biked around parts of the dam to join up properties and provide an activity-based-non-motorised experience.
- A dam adjacent site where weekly farmers markets and craft markets could be held.

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New business opportunities are possible here, as well as employment creation, and experience development, to position the area in leisure tourism experiences. There are already private sector lodges operating accommodation around the dams. Supporting these entities to create shared itineraries and packages that can be bought by locals and visitors alike could help build the destination experience.

Local government, provincial government and other entities can help to kickstart this through:

- Developing regulations that are aligned with local government responsibilities and rules, and provide a clear environment for permits, leasing, recreational activities on the dams, and the monitoring and evaluation thereof.
- Infrastructure enhancements for access to and around the dam.
- Funding for marketing of a dam route – a pedestrianised / bike routes around the dam.
- Support to a private sector association of dam properties and stakeholders, including users, to develop joint plans for increasing dam use.
- Support to an inclusive process that bring on board black- owned SMEs into new tourism clusters and associations, and enables the conditions for their success through mentorship and access to concessional finance.

Ermelo, Chrissiesmeer and surrounds: More activities and attractions

To attract overnight tourists and keep them in the area, investments are needed in visitor experiences. Creating shared infrastructure could allow tourists to explore across the Chrissiesmeer pans, for example, and build on the farm-based events and agritourism, including weddings, and Mieliepop.

Local government, provincial government and other entities can help to kickstart this through supporting local tourism entrepreneurs to develop and execute a tourism plan which includes:

- Destination marketing of events, and existing agritourism experiences.
- Finance to support the private sector associations and collaborative initiatives in the area.
- Developing guidelines and shared plans for the privately held farmlands adjacent to the pans to allow for non-motorised access and experiences.
- Infrastructure enhancements for access to and around the dam, such as boardwalks, jetties, bird hides, interpretative boards.
- An inclusive process that brings on board emerging SMEs into new tourism clusters and associations, and enables the conditions for their success through mentorship and access to concessional finance.

**Anchor investment approach: A multi-faceted visitor attraction at a mining site**

While a mine museum has been identified in the Emalahleni IDP as one of the priority tourism projects, based on experiences in Europe and Indonesia, a mine museum might be more successful if part of a larger mine redevelopment. Other components should also be considered, particularly adventure and activity-based experiences, which can pull in different visitor markets. A partnership could be pursued with a mining house in which tourism development is investigated, drawing on experiences from other post-mining tourism developments, including:

- Repurposing buildings and land, including coal dumps, to provide sites for activities.
- Creating multiple experiences, including mine-based tours/exhibitions, activities based elements such as lakes and bike tracks.
- Food-based, agricultural-based, cultural venues and the like to attract different markets throughout the year.
- Targeting Gauteng and Mpumalanga-based business and government tourism through conference facilities.
- A mine museum/interpretation centre.

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This study has not reviewed potential mine sites nor the viability or financial feasibility of such a major project. The experiences of major tourism public private partnerships like Cradle of Humankind should also be carefully considered.

#### Considering cultural and heritage tourism potential

Provincial strategies emphasise the potential for cultural and heritage tourism given the Coalfields' historic and heritage sites, and Ndebele culture, but **few well-maintained and accessible attractions exist to draw in and retain visitors, and information on these sites is not marketed or forthcoming**<sup>6</sup>. Despite the numerous sites of ancient heritage, early African and European settlements, the South African War, and resistance and liberation history in the Coalfields, few are well-developed or maintained. From a demand perspective, culture and heritage have select appeal – particularly for school learners, or students of further educational and training; and other niche interest groups.

**Limited commercial appeal means that many heritage tourism assets in South Africa struggle to make a financial return on their investments and the sites seldom function as strong destinations on their own** (Pillay, 2013 in Rogerson, 2016, Vol 31). While cultural heritage site tourism is a major motivator of travel in Europe, this is less the case in South Africa. In general, in South Africa, heritage attractions do not typically perform as well as nature and adventure attractions. For example, the UNESCO World Heritage site of Robben Island, Cape Town, receives far fewer foreign and domestic tourists than any of the other Big-6 tourist attractions in Cape Town (South African Tourism, 2024).

#### Craft and design industries

The approach of this report has been to scope the market and economic potential through a regional destination lens. In terms of socio-economic justice, particularly for vulnerable and excluded communities, **the craft and design industry has the potential to empower and create direct economic opportunities for rural women and other small-scale makers, with clear linkages to tourism**. Craft and design entrepreneurs typically use traditional design and materials but are often challenged by access to (tourist and other) markets, and don't receive adequate design support, finance and business planning. An immediate intervention could therefore focus on craft and design strategy for cultural workers in the Coalfields, linked not only to tourism, but other market access channels:

- Working with existing market spaces where crafters interact with buyers in the coalfields, such as Corn & Cob; regular weekend markets; occasional events, and so on.
- Working with crafters to elevate their products into design ware and assist with production, pricing, design, inventory management and similar.
- Introducing new market channels to increase sales and build awareness.
- Public art programmes in and around the dams, on walkways, and in towns where there are tourism and recreational precincts.

**Furthermore, the Ndebele design aesthetic could be investigated as a placemaking tool, employing local artist and creatives, to create a visual landmark and branding for tourists and residents alike.** Esther Mahlangu, South Africa's pre-eminent Ndebele artist, with her iconographic style, was born in Middelburg and while her art school is far north in Mpumalanga, not on a major tourist route, drawing on inspiration from her legacy could support the tourism appeal.

<sup>6</sup> Tourism staff at the business chamber in Middelburg and the hotels in the area did not mention any of these sites as drawcards or destination attractions.

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*The Ndebele design aesthetic could be investigated as a placemaking tool, employing local artist and creatives, to create a visual landmark and branding for tourists and residents alike.*

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*From a demand perspective, culture and heritage have select appeal, particularly for school learners or students of further educational and training, and other niche interest groups.*

## **POST-MINING AND AGRICULTURAL TOURISM: LESSONS FOR THE COALFIELDS**

South Africa already has some post-mining tourism, and many European and other countries have invested in visitor experiences as part of efforts to redevelop old mining regions. Certain lessons have applicability to possible post-mining tourism investments in the Coalfields.

1. **Private sector investments have mobilised post-mining tourism sites and experiences in South Africa.** In South Africa, Gold Reef City's heritage tour and Kimberley's Big Hole, Cullinan diamond tours, and Pilgrim's Rest are the best known – and most established – post-mining tourism destinations. The private sector supports all of these sites as experience developer, operator, or both. For example, Kimberley's Big Hole visitor experiences have at least in part been financed by De Beers; Gold Reef City mining tourism experiences are operated by Tsogo Sun, as part of a far larger destination including hotels, a casino, theme park and convention centre. Pilgrim's Rest is driven by SME tourism businesses in this small town.

⇒ *Lesson for the Coalfields: Private sector firms, particularly mining houses, should be part of the regional development of post-mining tourism.*

2. **Visitor experiences should be only one element of post-mining regional development and diversification.** In the Ruhr region in Germany and Nord-Pas-de-Calais in France, Tourism is not the only focus of economic diversification efforts. It forms part of multiple new land uses with multiparty development plans. Tourism is a good fit with landscape restoration, such as remediation of waterways and parks, and new biodiversity projects, as recreational use of these features can ensure they are both supported and that income streams and business opportunities are created. But tourism alone may not be sufficient to diversify a region's economy. Tourism relies on strong linkages with other industries and activities, like universities, industry agglomeration, and vibrant local economies, to drive recreation. One of the lessons from Indonesia's Sawahlunto site is to avoid an over-reliance on tourism for economic activities.

⇒ *Lesson for the Coalfields: An overreliance on tourism for economic diversification should be avoided. Tourism can be part of regional redevelopment initiatives. It necessarily benefits from other industrial, environmental and social investments in an area, which improve the broader environment and draw in diverse visitor markets.*

3. **Major regional development plans, pacts and stakeholder coordination have driven the redevelopment of many post-mining sites.** Broad stakeholder pacts or development coalitions have helped to drive the vision and create accountability between parties in the Ruhr region of Germany and Nord-Pas-de-Calais in France.

⇒ *Lesson for the Coalfields: Regional planning and stakeholder development pacts create the conditions for successful rehabilitation and new investments, including in cultural and natural experiences that draw in tourists and other visitors.*

4. **Major post-mining site rehabilitation and regeneration, including industrial heritage attractions, are typically financed, at least in their first phase, by public funds.** From a tourism perspective, while these investments in regional rehabilitation and regeneration, including new "anchor attractions", may not be commercially profitable as ventures, they are necessary to set the scene for further investments in the visitor experience. The repurposing of mine facilities into dams, ski slopes, cultural venues, has also created drawcards for visitors, leading to destination development and establishing market demand. This then creates opportunities for smaller-scale private sector investments.

⇒ *Lesson for the Coalfields: Public finance is required to address environmental, infrastructural and social development priorities in post-mining regions, before new investments in experiences. Repurposing sites and facilities for visitors may not be commercially viable, although major anchor projects can draw in tourists and other visitors, which support the overall destination economy.*

*For the most part, the composition of South Africa's top 100 imports has remained unchanged. Imports cover transport, ICT, medical devices and pharmaceuticals, food and beverages and industrial products.*

5. **Recognition of the community and cultural significance of mining has been a major motivator of the development of visitor experiences at the sites.** Ex-miners are often employed as mine tour guides, to recount, first-hand, their experiences of working in mines. Honouring people's heritage and way of life has formed part of post-mining place-making.

⇒ *Lesson for the Coalfields: Inclusion of ex-mine workers and communities in cultural and heritage experience development can help to honour the heritage of the area and people's way of life.*

6. **Post-mining, the emergence of a new tourism destination and cluster may take some time.** In France and Germany, at Nord-Pas-de-Calais and Escher Park in the Ruhr, both examples of successful post-mining development, "bottom-up" innovative proposals took place as part of later phases in the redevelopment processes. In the Ruhr and Nord-Pas-de-Calais in France, decades passed between early investments and the emergence of well-established visitor destinations. For example, while initial tourist numbers visiting the Louvre-Lens museum – a major anchor attraction – in Nord-Pas-de-Calais were substantial, broader networks of experiences and entrepreneurs took longer to establish. In agritourism, the wine route in Stellenbosch took a different, more incremental development path, with a relatively slow and steady growth over time in members and wine farm experiences for the first few decades, then a more marked investment in luxury or high-quality experiences driven by affluent wine farm owners. Success relies on enough co-located experiences to create a regional brand and offering that pulls in tourists.

*Lesson for the Coalfields: Successful tourism in post-mining areas may take some time to develop.*

7. **The different landscape features within major mining areas are extensive and present different opportunities for redevelopment.** This includes, in coal mining, "physical and geographical components (slag heaps, farmland, mining subsidence ponds, and woods), a mining industrial heritage (pitheads, residual industrial buildings, and headgear), vestiges of transport equipment, the so-called "cavaliers" (canals, railways, conveyors), worker housing ..." (Souza, 2024). Adventure and active tourism are common uses for post-mining sites and form an important part of destination offerings, attracting diverse markets. Iconic and bold infrastructure conversion – whether turning pits into lakes or dive sites, slag heaps into ski sites, mountain biking, hiking routes, factories and structures into museum halls, look out points – sits at the heart of the reinvention of sites.

*Lesson for the Coalfields: Post-mining tourism should not be limited to a museum but introduce multiple natural and activity-based experiences, where possible.*

#### **Examples of slagheap redevelopment in Nord-Pas-de-Calais**

- Outdoor activity and adventure tourism: hiking peaks – providing panoramas from the summits of Europe's highest slag heaps; training for ultra runners – the "hell staircase" at the Arena Terril Trail in Noyelles-sous-Lens; cycling circuits - around the lake at the Terril des Argales in Rieulay and artificial ski slopes.
- In Rieulay a vineyard has been grown on a slag heap. The Chardonnay grapes are hand-harvested and produce a wine referred to as "Charbonnay", in reference to charbon (coal).
- Loos-en-Gohelle's former coal extraction site known as the Base 11/19 serves as a tourist attraction, music centre, and sustainable development hub. From the café operated by the tourism office, activities are offered on the terrils like art therapy class, a meditation session, or a sunrise hike with breakfast.
- The Mission Bassin Minier has sought to create links between the terrils, mostly along the railroads that once transported coal, to serve as both nature corridors for fauna and recreational greenways for people.
- In 1996, at Losinord, on the tip of Noeux-les-mines, a ski slope was installed and close by, and more commercially successful, is the artificial lake with a nautical base for summer sports (Helfer, 2021).

*For the most part, the composition of South Africa's top 100 imports has remained unchanged. Imports cover transport, ICT, medical devices and pharmaceuticals, food and beverages and industrial products.*

8. **Creating multiple activities and interests for different user groups, including residents, can improve year-round visitation and utilisation of sites.** In Indonesia, at Sawahlunto, while heritage elements are important, enabling or supporting aspects such as safety and security, accessibility, and cuisine offerings were seen as strong determinants of destination appeal. Food has also emerged as an important drawcard in the wine routes of Stellenbosch.

⇒ *Lesson for the Coalfields: Multiple experiences and activities can attract more diverse markets, improving visitation, commercial performance and creating a more resilient post-mining tourism development.*

9. **Several of the global studies of industrial tourism underscore the importance of proximity to consumer markets with disposable income, as well as good transport infrastructures to reliably and affordably connect tourists to sites and routes.** In the case of Finland, more investments in recreation, cultural and commercial infrastructure occurred at mine sites in or close to cities and villages than at remote sites (Kivinen, 2017). In Indonesia, in the Sawahlunto study, accessibility has been highlighted as a critical factor in supporting tourism development (Armis, 2020; Fajri, 2020).

⇒ *Lesson for the Coalfields: Access to sizeable local and regional markets supports the emergence of new destinations. Remote sites struggle to draw visitors off major roads and routes. Resident populations are also critical visitor markets that help sustain a year-round destination and ensure local community relevance and benefits from tourism. Transport infrastructure must work to connect visitors with destinations.*

## Enabling conditions for tourist potential

Tourism thrives when the enabling environment is supportive.

**Tourism capabilities and agency in skills, institutions, funding, and collaboration all require investment.** Tourism is often an unfunded mandate at the local government level. The new Nkangala regional tourism organisation has an important role to play in helping to coordinate and elevate the tourism potential of the region. A recent survey of the members of the Southern African Tourism Services Association (SATSA) indicated the desire among tourism firms for greater awareness and education on sustainability, and advice on certification, as well as improved government capabilities (Rivett-Carnac, 2025).

**The enabling environment for tourism requires investment and active management of infrastructure services.** Various studies on the area, including recent tourism reports (Nkangala District Municipality, 2023; Mpumalanga Tourism and Parks Agency, 2024a) as well as interviews with tourism stakeholders, indicate several barriers to tourism development. These also emerge through the SATSA survey (Rivett-Carnac, 2025).

I. **Safety and security** are a concern for tourism firms, particularly with illegal mining in the Coalfields, which must be addressed. Pilgrim's Rest tourism has been significantly disrupted by illegal mining.

II. **Pollution:** air – and water pollution, in particular, remain an enormous challenge to the leisure appeal of the Coalfields, and threaten the natural assets which do and could draw tourists and other recreational users. Dams are an important feature, and water pollution from mining in rivers and dams affects local users and also tourists. Water management and remediation should be a priority area, not just for tourism, but for broader socio-economic and environmental justice. WWF South Africa is already active in this space, and their work can be leveraged to extend its application.

III. **Contestation over land use between tourism and mining:** Tourism owners and potential investors can be frustrated by mining and prospecting applications in or close to protected areas and tourism sites, leading to significant legal costs and negative investor sentiment. Mining and prospecting close to important sites and tourism locations must be restricted and fully comply with the law.

- IV. The poor condition of certain non-tolled roads can dissuade travel to destinations in the area and create costly car repairs and delays. Local chambers and industry associations should continue to work with the government to identify roads that require upgrading<sup>7</sup>.
- V. Electricity and water supply: Tourism and other firms, and households, are increasingly internalising the cost of basic infrastructure provision. They must ensure the security of supply of electricity, water and telecommunications for visitors and guests. Disruptions to these basic infrastructure services have a negative impact on businesses, increasing costs and reducing demand.
- VI. Local government capabilities, rates and taxes where local government barriers to tourism, or red tape, must be addressed. One example was cited of double rates being levied on an agritourism business.
- VII. SME and cluster upgrading support is required to support the inclusion and commercial viability of black-owned tourism SMEs, including mentorship. The lack of bankable business concepts, as well as highly competitive and variable operating contexts, and relatively low profit margins pose challenges to new entrants. Creating work-based experience, market access and skills, improving industry understanding, and access to concessional finance could enhance business viability. Tourism incentive finance that supports collaborative and inclusive innovation in building clusters could be considered to drive cluster upgrading and create further SME opportunities within the expansion and enhancements of destinations, and growth in market segments.

<sup>7</sup> There is a case to be made for investing in road infrastructure to Olifants River Resort which remains a major accommodation and conferencing destination in the region, but is limited by poor road access.

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