TOURISM ECONOMIC DIVERSIFICATION SCOPING STUDY COALFIELDS REGION

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ABOUT THIS REPORT

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ABBREVIATIONS

B2B	Business to Business
EU	European Union
GDP	Gross Domestic Product
IDP	Integrated Development Plan
JETP	Just Energy Transition Partnership
MICE	Meetings, Conferences, Incentives and Exhibitions
MPTA	Mpumalanga Tourism and Parks Agency
PCC	Presidential Climate Commission
QES	Quarterly Employment Survey
RIEDAT	Roadmap for Inclusive Economic Diversification and Transformation (World Bank)
SADC	Southern African Development Community
SATSA	Southern African Tourism Services Association
SME	Small and Medium-sized Enterprises
SMMEs	Small, Medium and Micro Enterprises
TIPS	Trade & Industrial Policy Strategies
UK`	United Kingdom
US	United States United Kingdom
TSAS	Tourism Satellite Accounts
TTDI	Travel and Tourism Development Index
VFR	Visiting Friends and Relatives
WWF-SA	World Wide Fund for Nature South Africa

EXECUTIVE SUMMARY

In the Mpumalanga Coalfields region, it is estimated that up to 120 000 jobs in the coal mining, energy generation and petrochemical production industries could be affected by the move away from fossil fuels (Patel, 2020). Economic diversification is required to mitigate these job losses. Elsewhere in the world, tourism and recreation (a linked industry) are prominent sectors in post-mining economic diversification. They also warrant consideration in the Coalfields; however, little data currently exists on the characteristics and segments of the tourism sector in the region. To address this gap, this research report reviews secondary research on tourism in the province; considers findings from an online survey of tourism firms (certain of which operate in the area); draws on in depth semi-structured expert interviews; undertakes a synthesis of literature on tourism as a sector for economic diversification in other post-mining regions, and includes a limited number of case studies. It concludes with a discussion on possible approaches to tourism development in the Coalfields.

The findings indicate that tourism in the Coalfields is currently structured to support existing business tourism based on the industrial base – that is, coal and other industries – and the government meetings' industry, with multiple (smaller) accommodation establishments in existence, primarily located in two spatial clusters. The first is the Emalahleni and the Middelburg cluster; the second, around Ermelo and Chrissiesmeer. There are few visitor attractions and experiences across the Coalfields region. In fact, none of the top 20 attractions in the Mpumalanga province, as identified by foreign tourists, are located in the region. Residents also have few recreational options. In the Eastern cluster, Ermelo and Chrissiesmeer have recently receiving some investment in a few small-scale leisure tourism experiences for the wedding and other events tourism markets; and certain of the farms, and the historic town of Chrissiesmeer, provide agri- and ecotourism experiences.

More generally, and working in its favour, the Coalfields have agglomeration characteristics that support economic development, particularly given the industrial development and population density in and around Emalahleni and Middelburg. This is significant for tourism development, where non-accommodation tourism firms, such as restaurants and visitor attractions, rely on both tourists and local visitation for year-round demand.

Based on the lessons learned elsewhere in the world as well as in post-mining developments and agritourism routes in South Africa, two possible development approaches are identified. These are not mutually exclusive. The first involves cluster upgrading of small and medium-sized enterprises (SMEs) in the region to better respond to existing market potential and build a sufficient scale of experiences to attract tourists. The second identifies the potential for a major anchor development, based on repurposing mining infrastructure and facilities located close to both Gauteng and major road networks. In both development scenarios, it is proposed that a range of visitor experiences be created to appeal to diverse market segments and potential. These include residents, Southern African Development Community (SADC) tourists, visiting friends and relatives, self-driving foreign tourists, foreign tour groups, and business tourists in the area. Emalahleni Dam offers immediate opportunities for more visitor experiences on and around the dam, while more agri- and ecotourism offerings can be supported in the Eastern cluster, around Ermelo and Chrissiesmeer. A major mine redevelopment into a destination providing multiple offerings, including heritage, adventure, activities, and conferencing, could also be investigated further.

Fundamentally, however, as with other tourism regions around the world, an enabling environment must be established and maintained to support tourism. This includes improvements in safety and security (particularly the risks posed by illegal mining and the land use competition from mining, including in protected areas), road infrastructure enhancements, strengthened government capabilities in tourism development and marketing support (including reducing red tape). Access to business support and concessional finance is necessary to support the entrance and growth in SMEs. Supporting existing and new industry associations to deepen their collaboration and inclusivity is an area of immediate potential. Successful tourism regions rely on collaboration and cooperation between destination businesses, communities and government for effective planning, and marketing.

1. INTRODUCTION

1.1 Problem statement

Employment in the coal value chain – including coal mines, Eskom power generation, petrochemical production and small coal truckers – exceeds 120 000 workers (Patel, 2020). The South African coal value chain is highly localised in a handful of municipalities in Mpumalanga where mining, energy generation and petrochemical production facilities are located. With the planned decommissioning of Eskom coal-powered generators in the region, alternative economic opportunities in this area must be supported, where feasible. The Coalfields tourism performance is poor and warrants additional consideration.

1.2 Settlement and spatial context

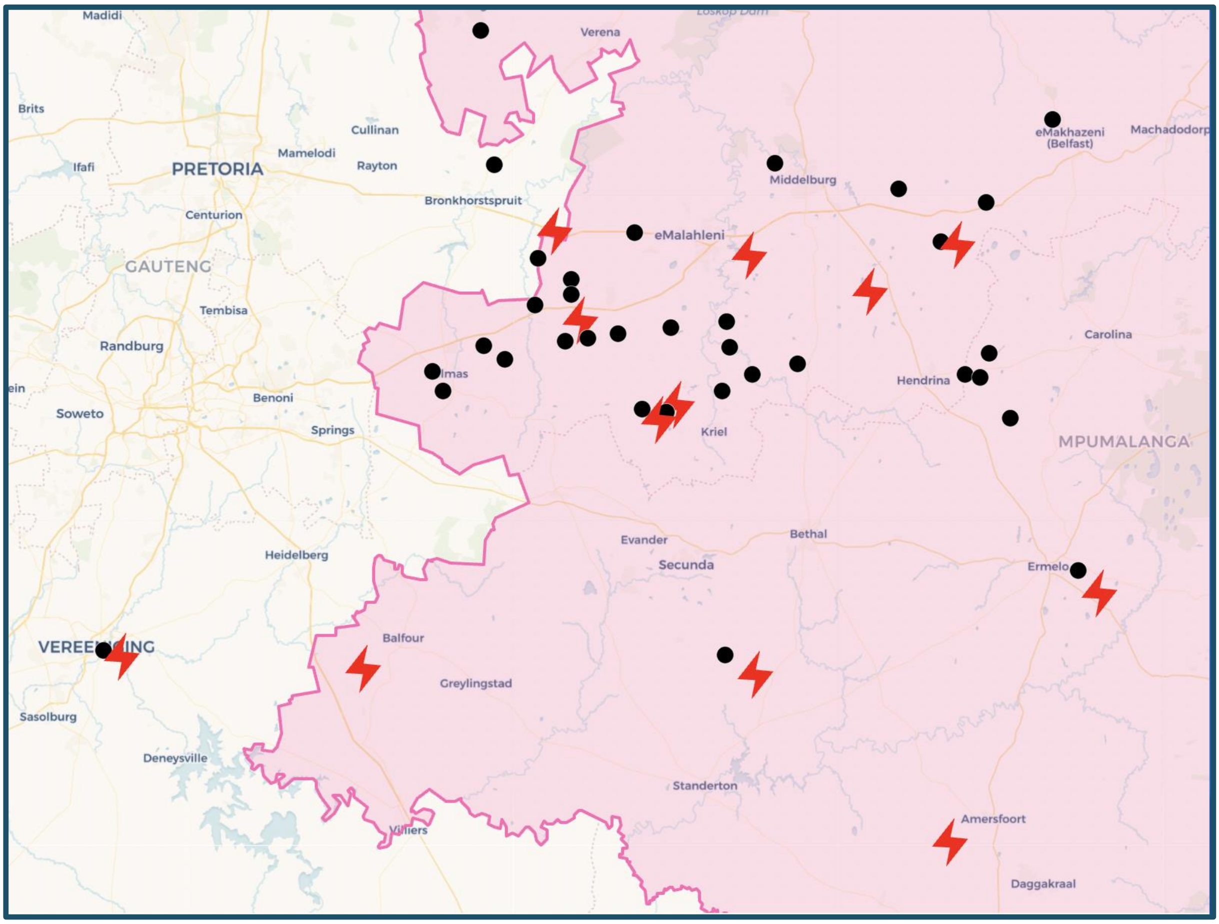
Mpumalanga's land area of 79 495 km^2 with 5.1 million people, or 8.2% of South Africa's overall population (in 2022), and contributed 7.5% of South Africa's Gross Domestic Product (GDP) in 2019. Almost one million people in Mpumalanga are without work, with unemployment rates higher for women and youth and a larger share of informal sector employment than the rest of the country (World Bank, 2024).

eMalahleni is the second biggest city in Mpumalanga after Mbombela, with approximately 300 000 residents. Many of the large towns, Middelburg, Mhluzi, Ermelo, Bethal, eMkhondo (Piet Retief), Standerton, Sakhile, Secunda and Mashishing (formerly Lydenburg), have developed in response to mining and each had a population between 40 000 and 90 000 people in 2011 (World Bank, 2024).

In addition to these towns, 10 settlements were established by mining companies as mine villages to provide housing, services, and recreational facilities for employees. Similarly, six settlements were created by Eskom for its employees. These towns have changed since 1994 with a shift away from discriminatory racial practices in the provision of staff accommodation. It is estimated approximately 8500 people lived in these plant villages, 6000 in mine villages (coal and gold) and 60 000 in mining towns in 2011. About 1.2 million people lived in the coal communities – which includes other kinds of coal-related settlements (World Bank, 2024).

The phase out of coal related energy generation after Komati's closure, originally had two Eskom coal-fired generation plants (Camden and Hendrina) scheduled for closure by 2025, with four other plants (Grootvlei, Arnot, Tutuka and Kriel) planned for retirement between 2027 and 2030. Duvha and Matla were meant to retire by 2034 (World Bank, 2024). Recently, the Eskom board approved the continued operation of Camden, Grootvlei and Hendrina to 2030, delaying the planned decommissioning schedule (Erasmus, 2024).

Figure 1: Location of the Mpumalanga Coalfields



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

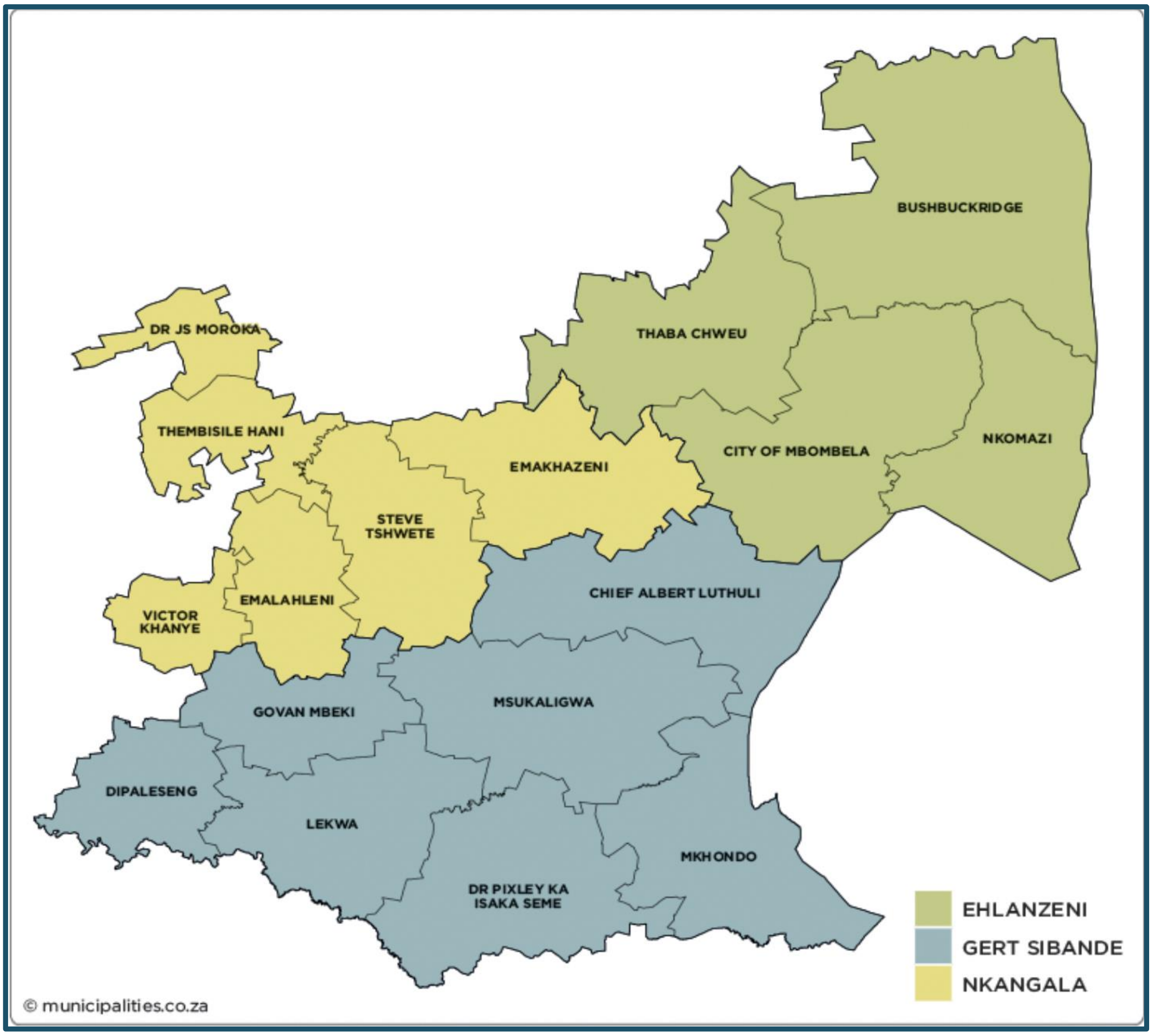
Given the high number of coal mines in their municipalities, eMalahleni, Steve Tshwete and Victor Khanye are the most directly affected by mine closures. The World Bank measures economic sensitivity relative to the intensity of the socio-economic influence of coal mines and plants. They use measures such as jobs, income, revenue, GDP, tax, employee income, and linkages to other industries. Based on this approach, 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).

These three municipalities are located in Nkangala district municipality and are relatively close to Johannesburg and Pretoria:

- Delmas, in Victor Khanye municipality, is approximately 70 kilometres from central Johannesburg and Pretoria.
- Emalahleni is 132 kilometres from Johannesburg and closer than this to Pretoria.
- Middelburg, the main town in Steve Tshwete, is a further 25 kilometres east of Emalahleni.

The location of these most at-risk local municipalities is indicated in Figure 2, within the Nkangala district.

Figure 2: Mpumalanga's municipalities



Source: Municipalities.co.za.

1.3 Locational quotient

The Coalfields region spans the two district municipalities Nkangala and Gert Sibande, strategically and economically linked to neighbouring provinces and countries. With Gauteng in the West and Mozambique and Eswatini in the East, the Maputo Corridor contributes to the economy of the area and also creates further opportunities – linked to trade, investment, tourism – for development. Gauteng is home to about 15 million people and is the richest province. The proximity of the Coalfields to Gauteng's residents and businesses should create opportunities for leisure and business tourism alike.

1.4 Why tourism?

Tourism is an important industry in terms of GDP and jobs, small business creation, balance of payments, and rural development. Tourism's contribution to the country's GDP was 2.8% in 2018; 3.7% in 2019 (pre-Covid) and 3.5% in 2022 (Statistics South Africa, 2024a).

In Mpumalanga, tourism is estimated to have contributed between 2% and 3.8% in 2022 (Mpumalanga Department of Economic Development and Tourism, 2022). It is a labour-creating economic activity in the province with an estimated labour intensity of 4.73 jobs per R1 million of economic output

(Genesis, 2024). For the country as a whole, 773 385 persons were directly engaged in producing goods and services consumed by visitors in 2022, or 4.7% of all employment in that year. This is a strong recovery of the 2019 jobs number of 777 686. 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, 2022)[1], a higher share than tourism's contribution to provincial GDP.

Part of tourism's economic appeal to development planners in addition to its relative labour-intensity is that it presents opportunities for small, medium and micro enterprises (SMMEs). It also 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 situation in informal businesses (Rivett-Carnac, 2022). The 2020 Sector Jobs Resilience Plan for Tourism identifies these challenges, recognises tourism as an "at risk" sector from climate change and identifies the severe impact this would have on low-income workers, small businesses and communities. The resilience plan proposes actions to protect workers in the sector (TIPS, 2020)[2].

1.5 Research methodology

The research methodology includes:

- In Section 2, a review of secondary data, particularly official statistics and reports which describe tourism's performance in the province and official plans and strategies for the sector.
- in Section 3, a review of global literature on post-mining tourism with case studies and select lessons for the Mpumalanga Coalfields, and a shorter discussion on agri-tourism trends.
- in Section 4, findings from in-person and online semi-structured interviews conducted with key stakeholders, and a survey of Southern African Tourism Services Association (SATSA) members, including those operating in Mpumalanga. Non-tourism reports consulted include other Just Energy Transition Partnership (JETP) related documents, post-mining reports, local government Integrated Development Plans (IDPs), and similar. Media articles have also been consulted.
- Section 5 pulls together the various research findings to discuss tourism's potential role in the economic diversification of the province, and make proposals.

Establishing tourism potential

The World Bank Roadmap for Inclusive Economic Diversification and Transformation (RIEDAT) Economic Potential Index is comprised of three main elements: natural endowments, local infrastructure and agglomeration advantages. In this index, tourism potential is measured through only one indicator: proximity to a protected area, i.e. a park or conservation area. This is not a sufficient measure of tourism potential, particularly in a province where the Kruger National Park exists and would necessarily compete with smaller and lesser-known parks and nature reserves. Furthermore, the tourism competitiveness of an area is a more complex phenomenon than the proximity to protected areas alone.

[1] 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 impacts of the sector, including the vulnerable groups and communities involved in the sector (TIPS, 2020).

[2] An updated Sector Jobs Resilience Plan for Tourism is being developed as a related and complementary report to this one.

Table 1: World Bank Economic Potential Index

MAIN COMPONENTS	SUBCOMPONENTS
Natural endowments	Agricultural potential (land capability and grazing capacity) Non-coal mining potential (travel time to noncoal deposits and processing) Tourism potential (protected and conserved areas)
Local infrastructure	Road density Internet Access Water balance
Agglomeration advantages	Population density (people per km2) Industrial diversity Stock of skilled labour Domestic market access International market access

Source: World Bank, 2024. The Roadmap for Inclusive Economic Diversification and Transformation (RIEDAT). Phase I: Background Study – Stocktaking and Baseline assessment.

The World Economic Forum has developed the Travel and Tourism Development Index (TTDI) to capture the many dimensions affecting tourism competitiveness and development. It ranks countries' performance at a national level. In 2024, South Africa ranked 55 out of 119 participating countries, with an overall score of 3.99 out of a possible 7, up from 65th and a score of 3.9 in 2021. South Africa's scores are indicated in Table 2, and have been categorised into "enabling" or "travel and tourism directly related". The lowest scores were on indicators where the country scored 2 or less out of 7; the highest scores were on indicators where the country score 5 or more out of 7 (World Economic Forum, 2024).

Table 2: Select South African scores on the World Economic Forum Travel and Tourism Development Index

ENABLING	
Lowest score (2 or lower of 7)	**Highest score (5 or higher of 7)**
Lowest	**Highest**
• Safety walking alone at night • Homicide cases • Number of physicians per 1000 population • Particulate matter • Total protected areas of a % of total area • Broadband internet subscribers per 100 population • Number of oral and intangible cultural expressions (measured by promotion, development and protection and not innate potential)	• Global terrorism index • Organised crime deaths • Use of basic sanitation, % of pop • Use of basic drinking water, % of pop • Female labour force participation • Active broadband mobile subscriptions • 3G mobile network coverage, % of pop • Use of digital payments • Purchasing power parity • Total known species • Total protected areas, km2 • Presence of Forbes Global 2000 HQ • Renewable energy regulation • Energy efficiency regulation • Environmental treaty ratification
TRAVEL AND TOURISM SPECIFIC, RELATED	
Lowest score (2 or lower of 7)	**Highest score (5 or higher of 7)**
• Travel and Tourism government expenditure, % government budget • Hotel rooms, per 100 pop • Number of short-term rentals listings, per 10 000 pop • Cultural and entertainment tourism digital demand • Non-leisure tourism digital demand	• T&T high wage jobs, % employment in high wage sectors • T&T Labour gender parity • Seasonality of international tourist arrivals • Use of digital platforms for providing hotels, restaurants and leisure activities services • Timeliness of providing monthly/ quarterly Travel and tourism industry data

• Travel and tourism use of low-carbon energy, % of total • Inbound length of stay, in days • Travel and tourism industry's use of low carbon energy	• Country brand strategy • Travelsat hospitality reputation index • Hotel price index US$ • Efficiency of air transport services • Number of World Heritage natural sites

Source: World Economic Forum, 2024.

While certain TTDI measures of subcomponents – such as, for example, visas and airline efficiency – are best measured at the country-level, a number of the subcomponent indicators lend themselves to local level measurement. A Tourism Economic Potential tool for this project is provided in Table 3. The components and subcomponents of the assessment tool formed core elements of the semi-structured interview guide. This made it possible to link the tool with the assessment frame and the organisation of research findings.

Market potential was established during the semi-structured interviews to identify possible experience gaps aligned with existing demand or that could unlock new demand. These relate to different tourist segments' travel preferences and characteristics. A market potential segmentation tool has been used to identify key characteristics, gaps, and opportunities for different visitor segments.

Table 3: Tourism Economic Potential Research tool for Mpumalanga Coalfields

MAIN COMPONENTS	SUBCOMPONENTS	MAIN CONSIDERATIONS	PROPOSED AND POTENTIAL DATA SOURCES
Natural endowments	Protected areas and natural sites of significance Cultural sites of significance	Protected areas, lakes, dams, rivers, mountains, biodiversity heritage sites	National and provincial conservation areas (SANParks, Mpumalanga Tourism and Parks Agency)
Local built infrastructure services	Road density and quality Internet Access Water balance Energy services	Road access and quality Internet, water and energy reliability for visitors	Expert interviews Secondary reports (such as SANRAL, media)
Tourism specific infrastructure	Accommodation establishments Visitor attractions and activities Restaurants Sports, recreational facilities and amenities Events and event facilities	Number Variety Quality Anchor sites and attractions Annual events of a certain size	Google maps, booking.com, Tourism Grading Council of South Africa, South African Tourism, Integrated Development Plans, SATSA membership databases. Expert interviews to establish quality. Focus on visitor attractions and accommodation
Local destination characteristics, capabilities and reputation	Safety and security Destination management capabilities and leadership Social, political and cultural capital Ecological quality (pollution) Traffic and congestion	Visitor perceptions of destination safety Road accidents Existence of a local tourism network, forum, collaborative body and leader. IDP/Local Economic Development and budget allocations / focus on tourism.	Expert interviews, secondary research such a tourism strategies, plans, speeches by different levels of government, as well as other grey online sources. JUST SA partner research Non-tourism public research sources

		Presence of local artists, innovators, chefs, musicians, etc. Littering, air pollution, noise pollution, water pollution, degraded landscapes; traffic, congestion	Other TIPS reports; Presidential Climate Commission (PCC); Department of Environmental Affairs.
Agglomeration advantages	Population discretionary income Industrial diversity Stock of skilled labour Domestic market access International market access	Discretionary income levels among local population Industrial base for visitor attractions – study tours, etc. Skilled labour Current domestic and foreign visitor markets in area, or passing through. Proximity to major generating markets	South African Tourism reports Discussions with tour operators; experts IDPs, municipal annual reports World Bank study; Genesis PCC study Published visitor numbers from key provincial tourist attractions; Statistics South Africa data

Source: Author, adapted from World Bank, 2024; Trukhachev, 2015; Yalmenko, 2018; World Economic Forum 2024.

2. TOURISM PERFORMANCE IN MPUMALANGA

2.1 Introduction

Drawing on secondary data sources, mainly official sources, this section highlights trends in tourism to Mpumalanga. Separate sections are presented for tourism demand; supply; and employment characteristics.

The research describes the current state of tourism in the province as well as certain of the developments underway or planned.

2.2 Tourism demand

By definition, tourism is “the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited” (Statistics South Africa, 2024). Tourists can come from nearby towns, or other parts of the province or country, as well as the region or overseas. They can travel for leisure – and this includes holidays or to visit friends and family - or to attend meetings, conferences, incentives and exhibitions (MICE) and other forms of business travel (to visit a supplier, client, for research, etc). Tourists also travel to shop for themselves (personal shopping) or for resale (business shopping), to study, for medical reasons and for religious reasons. Travel to attend funerals and weddings would typically be categorised as “visiting friends and relatives” (VFR) as the main purpose of the visit.

Unlike tourists, “same-day visitors” are any persons who visit a place without staying the night.

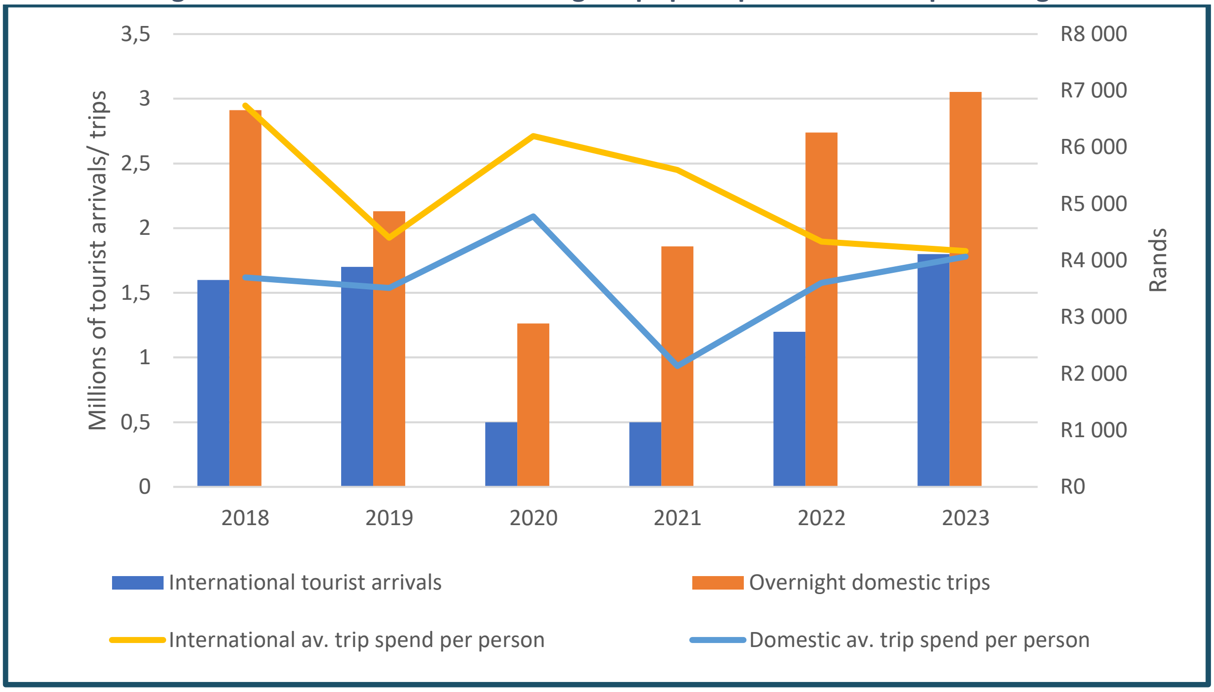
Residents of an area are also often important visitor markets for tourist sites, contributing to sales and income and supporting jobs.

Total foreign tourist arrivals to South Africa were 8.5 million in 2023, down 17% on 2019 arrivals. South African Tourism surveys indicate that overall tourist satisfaction was high in 2023, particularly among African tourists travelling overland to South Africa. Tourists are particularly satisfied with natural attractions and the friendliness of people, while infrastructure and safety were indicated as areas of concern (South African Tourism, 2024b).

By Q3 (July – September) 2024, international tourist arrivals were still 15% below 2019 levels, with Asia and Europe the slowest markets to recover, and with declines in the number of tourists from these markets when compared to the same quarter in 2023 (South African Tourism, 2024b).

Bucking the national trend, Mpumalanga saw a strong tourism recovery from COVID in 2023, with both foreign and domestic tourist numbers showing increases on 2019 numbers (South African Tourism, 2024b).

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



Source: South African Tourism, 2024b.

Foreign tourism demand

While overall foreign tourist arrivals to South Africa in 2023 were still 17.1% short of 2019 levels, 2023 saw a return to pre-COVID tourist numbers in Mpumalanga. The average spend per foreign tourist per trip was, however, lower in 2023 at R4167, than in 2019 at R4400, likely driven by the higher share of regional tourists in 2023. These tourists typically spend less than overseas holiday tourists.

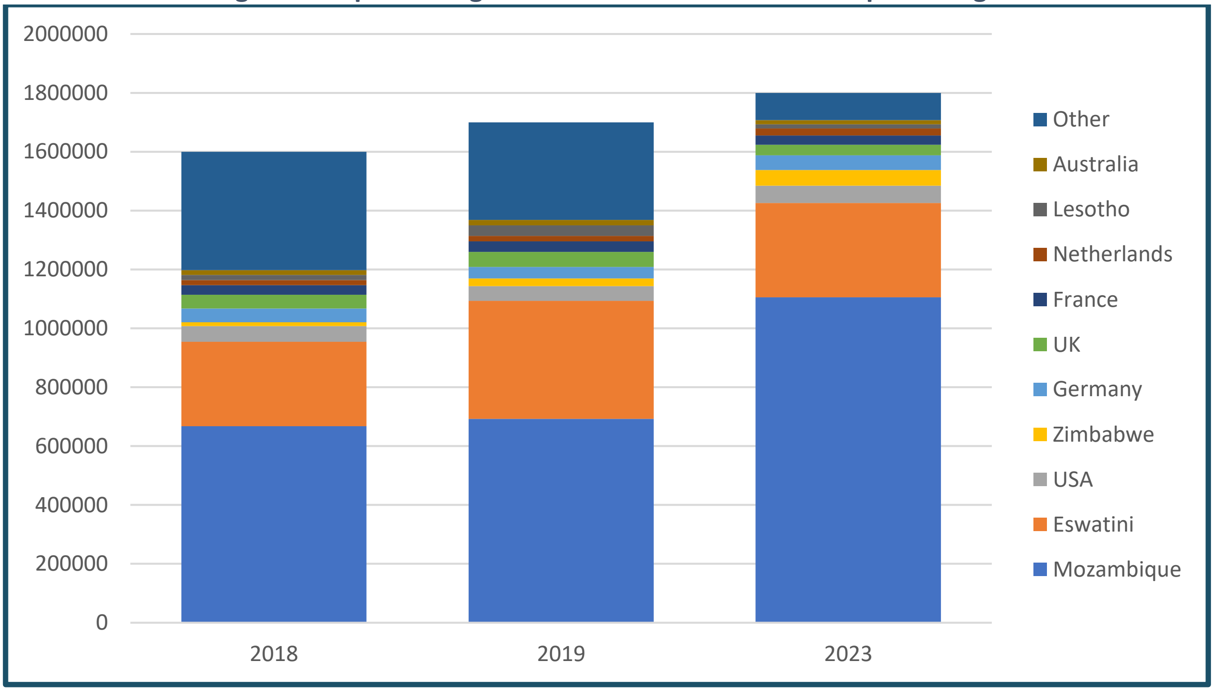
In 2023, Mpumalanga received the second most foreign tourists of any province, after Gauteng and before the Western Cape (South African Tourism, 2024b). This trend continued into the first three quarters of 2024. While Mpumalanga receives more foreign tourist arrivals than the Western Cape, the average expenditure per foreign tourist per trip in Mpumalanga is one-quarter of the Western Cape's. As a result, in total Mpumalanga earned one-third of the Western Cape's total foreign direct spend from tourism.

The source markets for foreign tourists remained largely similar to pre-COVID. Of the 1.8 million foreign tourist arrivals in 2023 in Mpumalanga, 1.1 million were from Mozambique and 320 000 from Eswatini. This means 80% of Mozambican tourists and about 44% of Eswatini tourists to South Africa visited Mpumalanga in 2023. Only 400 000 other foreign tourists visited the province in 2023. South Africa's traditional overseas markets dominate these numbers, with tourists from the United States (US), United Kingdom (UK), Germany, France, and Netherlands (South African Tourism, 2024b).

In the first three quarters of 2024, the trend in Mozambican tourists continued with 90% of 2023's tourist arrivals from that country by the end of September. Tourists from the US were also at 90% of 2023 levels by the end of the third quarter of the calendar year, and Swazi tourist arrivals were just over 80% of 2023 numbers. Tourists from the major overseas source markets of Germany, France, UK and Netherlands were all below 70% of 2023 tourist arrivals, which might suggest a decline is possible in total 2024 arrivals from these markets. In 2023, an "average" tourist from Europe spent R28 000 per trip in South Africa; with tourists from the US spending R32 900 each. This is 10 times more than the average per-person per-trip spend of Mozambican and Swazi tourists (South African Tourism, 2024a, South African Tourism, 2024b).

In 2023, foreign tourist arrivals from "other countries" shrunk considerably. This points to Mpumalanga's strong reliance on its top 10 foreign tourist markets (South African Tourism, 2024b). Furthermore, tourist arrivals to Mpumalanga from all leading overseas markets other than the US declined in the first three quarter of 2024 compared to 2023. South Africa overall made only moderate gains in overseas tourist arrivals in 2024, when compared with 2023, signally a possible plateauing of overseas tourist arrivals.

Figure 4: Top 10 foreign tourism source markets for Mpumalanga



Source: South African Tourism, 2024b.

In Q3 2024, Mozambique and Eswatini made up 81.6% of all foreign tourists while significant declines were recorded in tourist arrivals from the Netherlands and Germany when compared to Q3 2019, although tourists from the US grew by 51% in Q3 2024, compared with Q3 2019 (South African Tourism, 2024c).

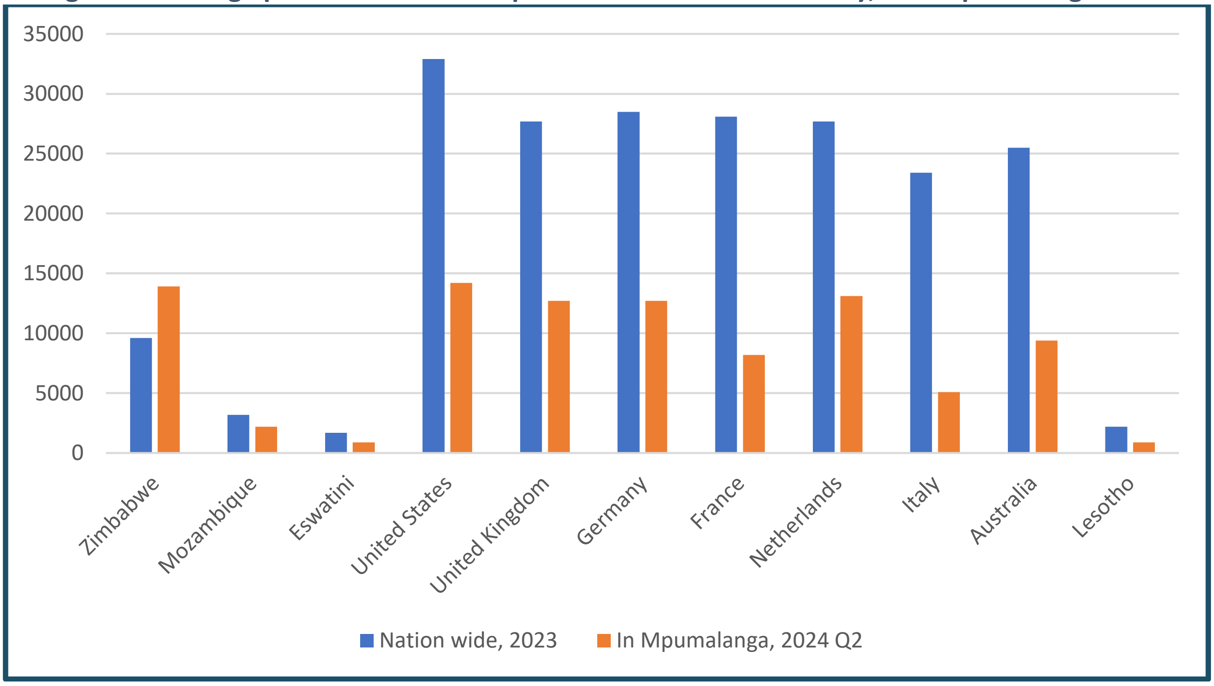
The 1.8 million foreign tourists to Mpumalanga in 2023 spent a total of R7.5 billion, and stayed an average of 9.4 nights in the province, accounting for 16.6 million bednights in total. Tourism performance data for 2024 is not yet available for the full year, but between January and September 2024, the average spend per foreign tourist declined further (from the 2023 average) (South African Tourism, 2024a and 2024c)

Figure 5: Foreign tourist arrivals and average trip spend per person to June 2024

Source: South African Tourism, 2024a and 2024b.

South African Tourism captures the average expenditure per tourist arrival per trip source or originating market for the country. In Quarter 2, 2024, data was also provided on the average expenditure per source market for each province. Figure 6 indicates the far higher average trip spend of overseas markets in South Africa and in Mpumalanga when compared with regional markets. Mpumalanga's share is a significant part of total expenditure for many markets. Also notable is that Zimbabwean tourists to Mpumalanga spend more in the province than the average total trip expenditure for Zimbabwean tourists to South Africa.

Figure 6: Average per tourist arrival expenditure in total for country, and Mpumalanga share



Source: South African Tourism 2024c.

In 2023, 21% of foreign tourists indicated it was their first time visiting Mpumalanga; 29% indicated they had visited more than four times; while 32% indicated they didn't know the number of times they had visited (South African Tourism, 2024b). Swazi and Mozambican tourists are considered in more detail given the high number of tourist arrivals from these countries.

Swazi Tourists

The highest share of regular repeat tourists in Mpumalanga are from Eswatini, many of whom have visited the country over five times. While Swazi tourists to South Africa declined by 20% to 733 949 in 2023, they increased by 114% to Mpumalanga over the period, to reach 320 548 in 2023. For Q1, Q2 and Q3 2024, Swazi tourist arrivals together reached 268 457, or 84% of full year numbers for 2023 (South African Tourism, 2024a and 2024c).

For all Swazi tourists to South Africa over the last six years, the average spend per tourist per trip declined from R2082 in 2018 to R1700 in 2023.

VFR was the main purpose of visit for Swazi tourists to South Africa in 2023, for 76% of arrivals, while "holiday" was 8% and business shopping was 6%, and 40% of Swazi tourist arrivals have visited more than 10 times.

Mozambican tourists

Less than 20% of Mozambican tourists indicate that they have visited South Africa more than five times. This is unlike other regional tourists, where many have visited more than five times (often 50% of total or more). This has been a consistent characteristic of Mozambican tourists, from before 2019 and remained the case in the first three quarters of 2024.

Mozambican tourist arrivals to South Africa returned to 2018 and 2019 levels in 2023, about 1.3 million, but the share that visited Mpumalanga grew considerably, from 667 888 in 2018 and 692 167 in 2019, to 1.1 million in 2023[3]. This continued in 2024, and by the end of Q3 2024, tourist arrivals from Mozambique for the year were already more than one million (South African Tourism, 2024a and 2024c).

For all Mozambican tourists to South Africa over the last six years, the average trip spend per tourist has grown from R2700 in 2018 to R3200 in 2023 while the average bednights per trip have declined from 14 in 2018, and 13 in 2019 to 10 in 2023.

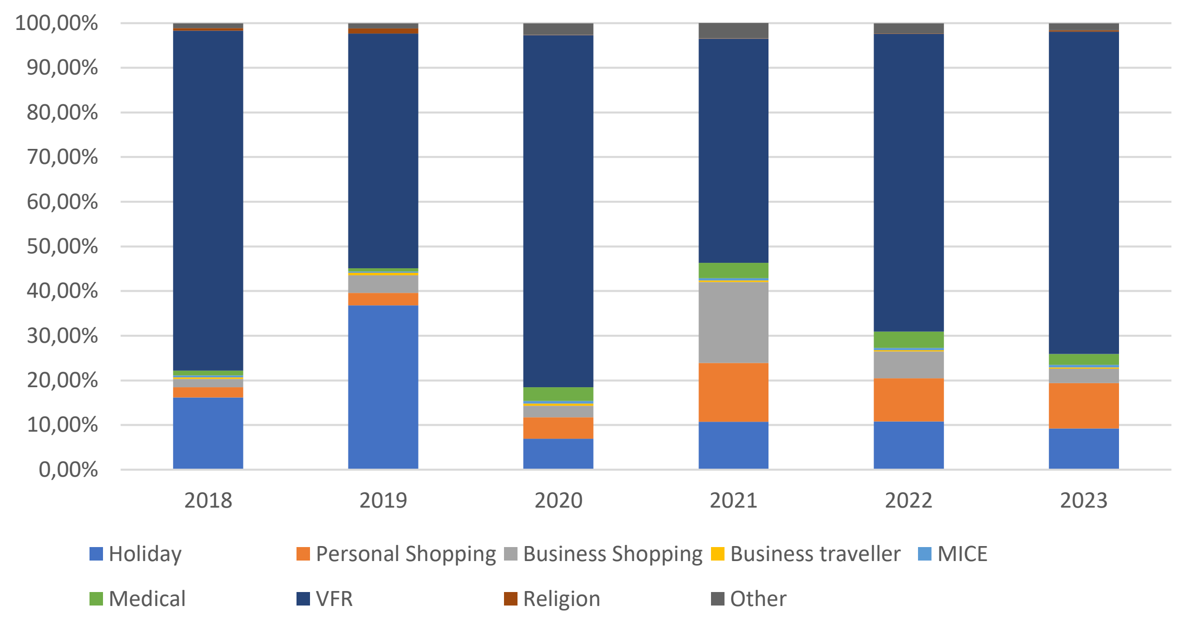
Purpose of visit for Mozambican tourists to South Africa has changed over the years, although since 2021 it's remained more consistent. VFR accounts for over 50% of the main purpose, and around 70% in 2023, similar to 2019 levels. 'Holiday' has been around 10% since 2021, considerably lower than pre-Covid while 'personal shopping' has grown considerably at the share of main purpose of trip.

In 2023, while 72% of Mozambican tourists visited South Africa to visit friends and relatives, 96% stayed with friends and family. Only 3%, or 33 305 Mozambican tourists, stayed in hotels in 2023.

As it's not clear what the impact of Covid has been on these numbers, 2024 data will provide greater insight into what the 'new normal' might look like.

[3] In 2023, far fewer Mozambican tourists visited Gauteng than in 2018 and 2019. South African Tourism data shows 251 000 Mozambican tourists visited Gauteng in 2023, down from 580 665 in 2019, and over 600 00 in 2018.

Figure 7: Purpose of visit for Mozambiquan tourists to South Africa, between 2018 and 2023

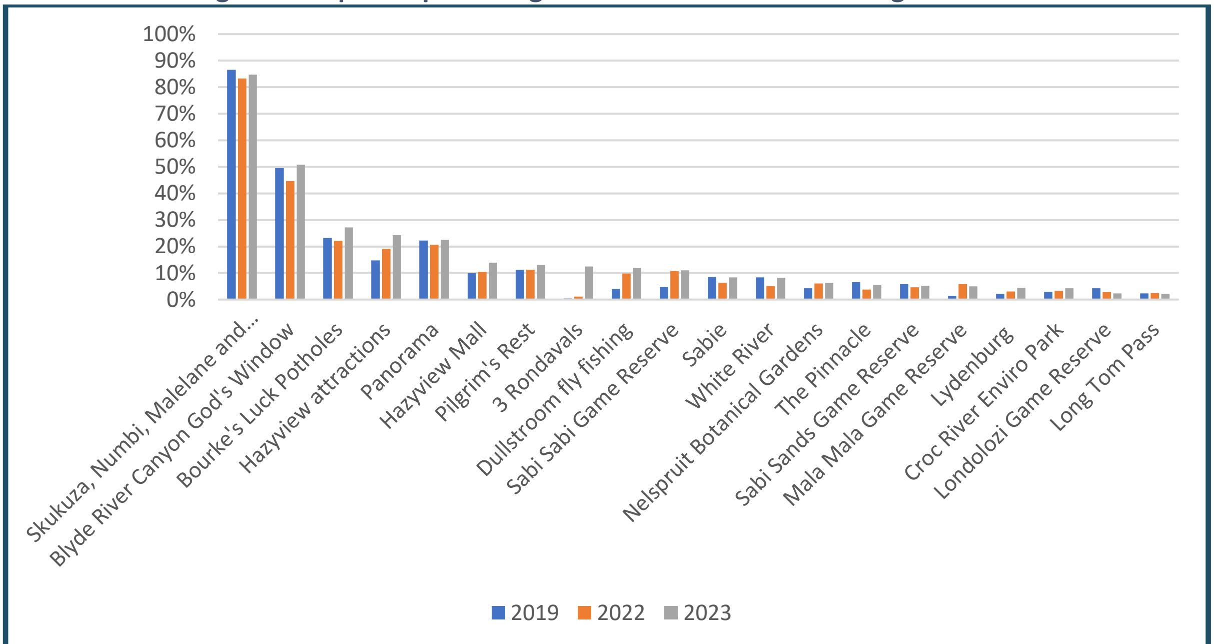


Source: South African Tourism, 2024b.

Visitor satisfaction

The destination characteristics which are the least satisfying to all foreign tourists are non-tourism infrastructure services. In 2023, the lowest satisfaction scores from foreign tourists were on "general infrastructure", "electricity", "safety and security" and "roads", irrespective of the region of origin of tourists. "Water" and "public transportation" also were lower-scoring areas, while "friendliness of the people", and tourism specific-infrastructure or superstructure like "tour guides", "restaurants", "accommodation" and "visitor centres" received high scores. This clearly shows the dependence of tourism on these critical infrastructure and social services, and the importance of these enabling services as part of the visitor experience of the country (South African Tourism, 2024b).

Figure 8: Top 20 Mpumalanga tourist attractions for foreign tourists



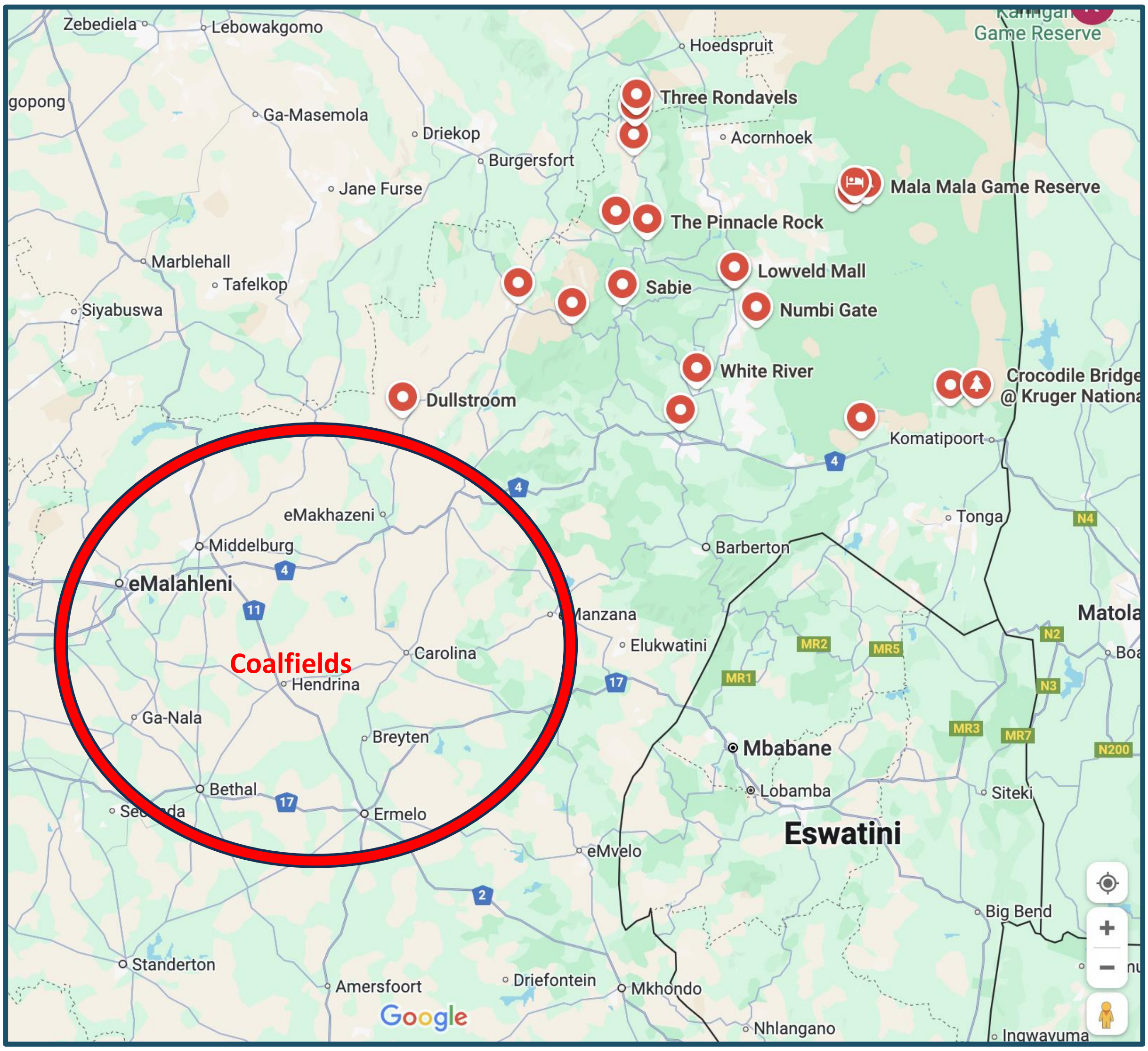
Source: South African Tourism, 2024b.

Top attractions

Mpumalanga's top attractions for all foreign tourists have remained the same over the years. In 2023, more than 80% identified areas in the southern Kruger National Park as the top attraction. Other highly rated attractions are Blyde River Canyon, Bourke's Luck Potholes, and Hazyview attractions as well as the Panorama route, Hazyview Mall and Pilgrim's Rest. Within the overall trend, only 40% of tourists from Africa identified Southern Kruger as a top attraction. For regional tourists, Hazyview Mall and White River received a higher score as top attractions (albeit only by a few percentage points), likely as a result of personal or professional shopping being important trip activity (South African Tourism, 2024a).

All of the top 20 attractions are located in the North East of the province, with the Lowveld Botanical Garden in Mbombela the most Southern site, and Dullstroom the furthest West.

Figure 9: Map of Mpumalanga indicating top attractions for foreign tourists

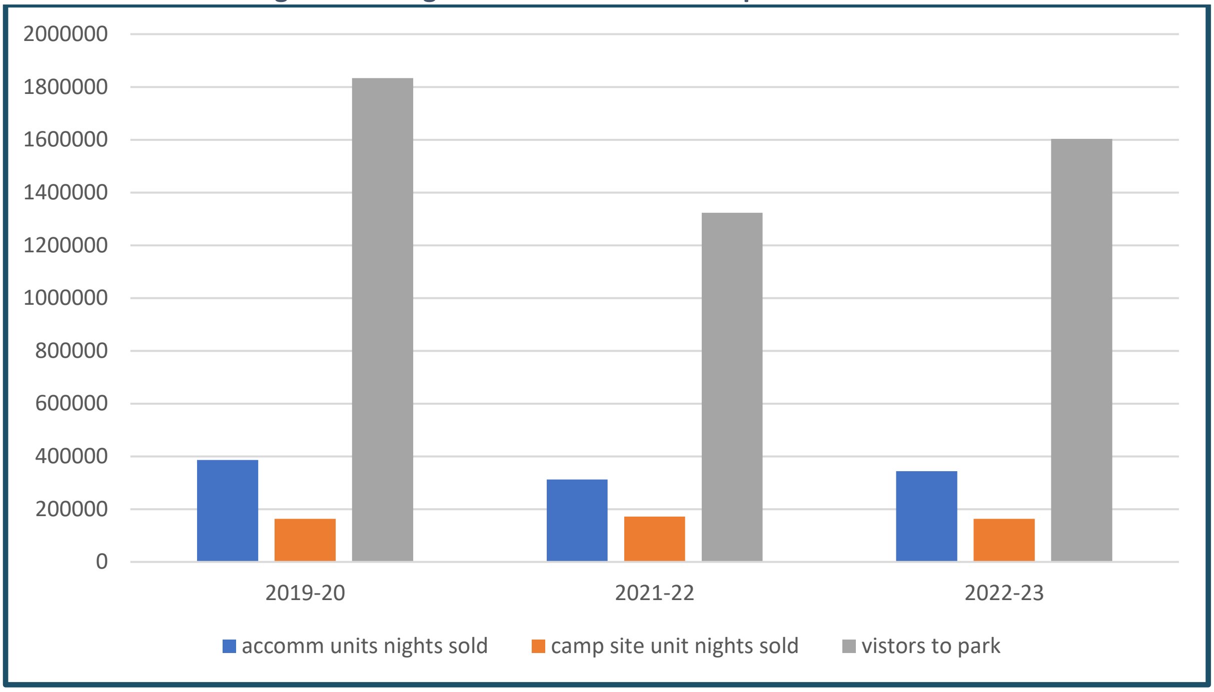


Source: Author adaptation of Google Maps with South African Tourism data (South African Tourism, 2024b).

Kruger National Park

Kruger National Park visitor numbers for the April 2022 to March 2023 were 1.6 million, less than the 1.8 million visitors recorded in 2019-2020, pre-COVID. These visitors included foreign and domestic visitors recorded as day or overnight visitors (South African National Parks, 2023).

Figure 10: Kruger National Park tourism performance data



Source: South African National Parks, 2023.

Domestic tourism demand

In 2023, domestic tourism remained the backbone of the national tourism economy, accounting for 37.9 million overnight domestic trips around the country, more than the 34 million in 2022 and 28.5 million in 2019. Domestic overnight spend in total in South Africa was R121.4 billion in 2023, up from R99 billion in 2022 and R43 billion in 2019 (South African Tourism, 2024b).

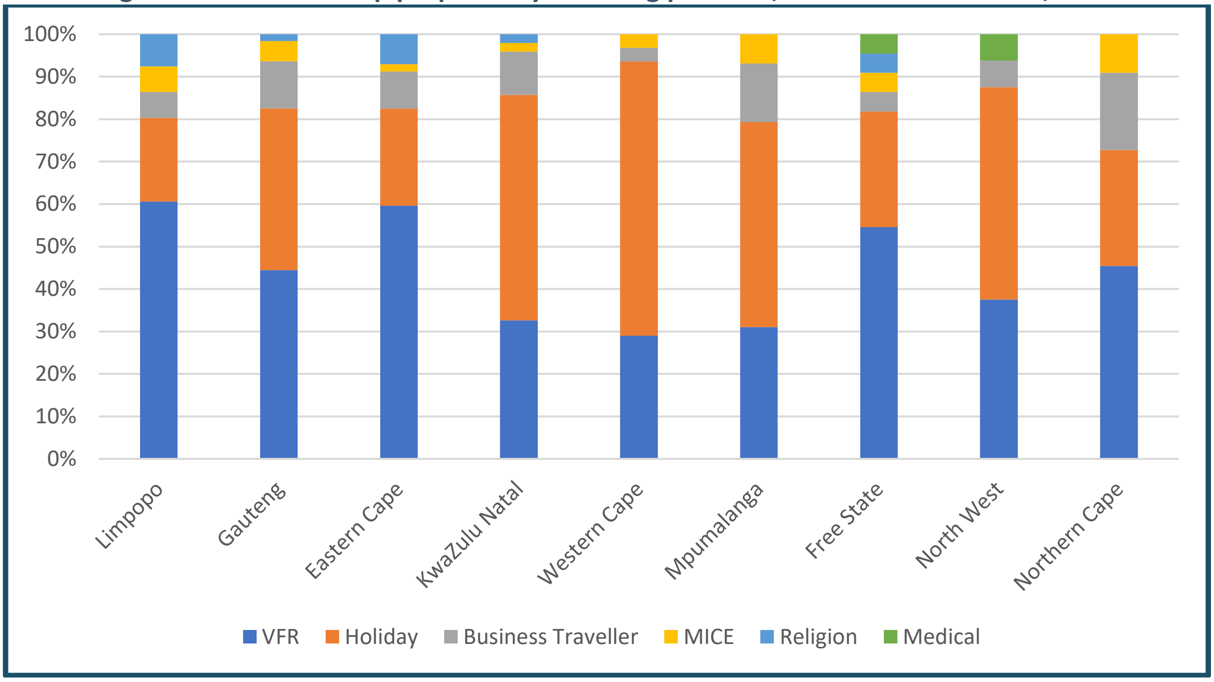
Across the country, VFR was the main trip purpose, accounting for 16 million trips, with "holiday" as the main trip purpose accounting for 12.8 million trips. Travel for business purposes comprised some three million trips. The number of holiday and business trips grew significantly in 2023 compared with 2022, at 40% and 72%, respectively, likely in response to all COVID restrictions being dropped by 2023 (South African Tourism, 2024b).

For the country as a whole, domestic day trip numbers fell in 2023 to 143 million, down from 176 million in 2022 and 236.5 million in 2019. It is unclear why the trend is downward for day trips.(South African Tourism, 2024b).

In Mpumalanga in 2023, overnight domestic tourist trips rebounded, to reach three million. This was up from 2.7 million in 2022, 2.13 million in 2019, and back to the 2.9 million in 2018. A total of 38.5% of all domestic tourists to Mpumalanga originated in Gauteng, with 21% from Limpopo and 33% from Mpumalanga itself (intra-provincial travel). Mpumalanga is the only province where interprovincial travel is not the main source of domestic tourist visits. While Mpumalanga generates about two million domestic trips each year, only one million of these are taken within the province (South African Tourism, 2024b). Limpopo is the most popular domestic tourism trip destination of all provinces in South Africa, partly explained by religious tourism to Moria each Easter.

In 2023, travelling for holiday purposes was the largest share of domestic trip purposes in Mpumalanga, followed by VFR and business travel, in that order. MICE was also a notable share of total (South African Tourism, 2024b). Figure 11 separates business travel and MICE; while in Figure 12 these two categories are combined, as this is the way it is reported.

Figure 11: Domestic trip purposes by receiving province, in millions of tourists, 2023

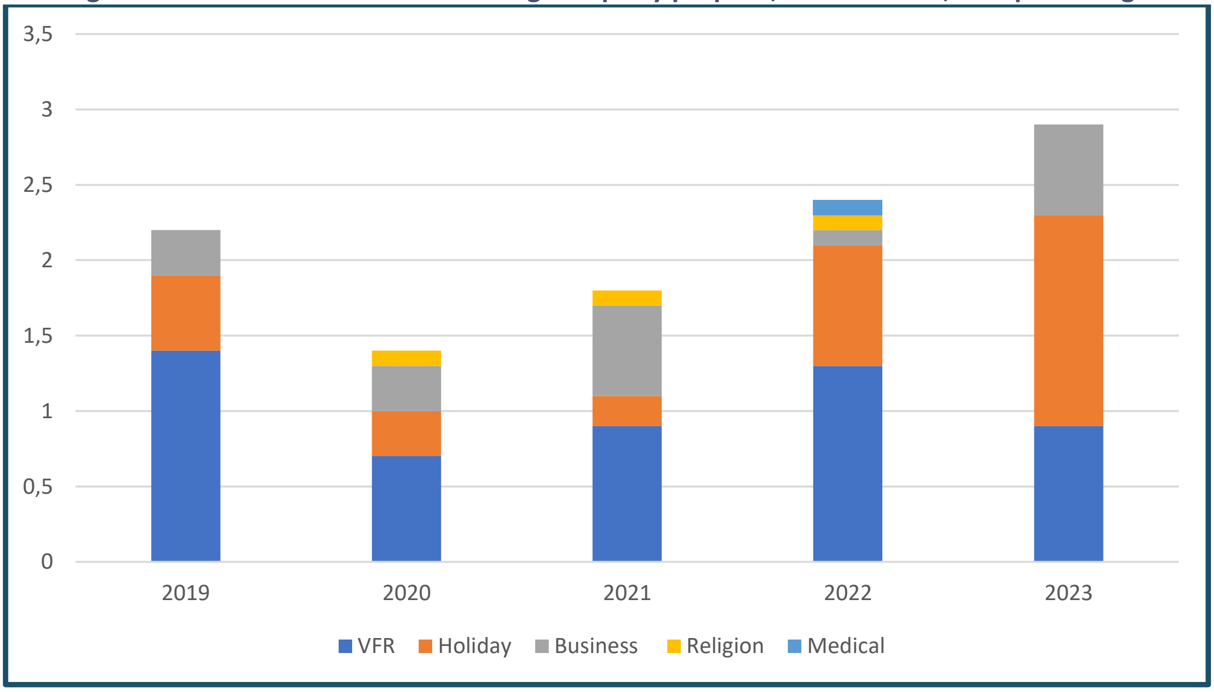


Source: South African Tourism, 2024b.

Over time, the main purpose of travel for domestic overnight trips to Mpumalanga has changed: 2023 saw a decline in VFR, and a marked growth in holiday and business (including business travel and MICE), likely as a recovery from COVID restrictions.

As COVID upended travel patterns, it's too early to tell if holiday will remain the main purpose of domestic overnight trip in 2024, and beyond, or if the post-COVID period will see a return to VFR.

Figure 12: Number of domestic overnight trips by purpose, 2019 to 2023, in Mpumalanga



Source: South African Tourism, 2024b.

Average domestic trip spend per tourist grew from R793 in 2018 to R4069 in 2023, driving the total domestic direct tourist spend in Mpumalanga up to R12.4 billion in 2023. This increase in average per person per trip spend may reflect the higher share of holiday tourists, and business tourists, which is dissimilar to previous years. Holiday and business tourists typically spend more on accommodation and food and beverages than do tourists who are visiting friends and relatives.

The R12.4 billion in domestic tourist expenditure in Mpumalanga in 2023 also clearly demonstrates the value of domestic tourism; it was greater than the total foreign direct tourism spend in the province in that year (South African Tourism, 2024b).

In addition to domestic overnight trips, 13 million domestic day trips originated in the province in 2023, down from 16.9 million in 2022. Mpumalanga also had 6.5 million domestic day trips in 2023. Day trip expenditure in Mpumalanga is not available.

2.3 Tourism supply characteristics

New tourism developments and projects

As indicated, the top 20 attractions for international tourists (as identified in South African Tourism surveys) except for one – Dullstroom – are located in the Ehlanzeni District Municipality. Major foreign tourism activity is centred on that district, with limited holiday tourism in other parts of the province. Less data exists on the travel patterns and destinations of domestic tourists than on foreign tourists.

Major new tourism developments taking place in or announced for Mpumalanga include:

- The Graskop Gorge Lift Company Cliff Walkway – which opened in 2024 – is a narrow walkway high above the lush forest below. The Graskop Gorge site has been a successful new development, attracting in the region of 200 000 visitors in 2024.
- A number of Mpumalanga Tourism and Parks Agency (MPTA) projects, including:
  - God's Window Skywalk, currently under development, which aims to attract between 45 000 and 60 000 tourists per annum.
  - A cable car project linking the Drierondavels view site and Swadini Dam, which is seeking finance.
  - An education centre, geo-sites and geo-trails are planned for the relatively newly inscribed Barberton Makhonjwa Mountain World Heritage Site.
  - A new hotel and conference centre in Middelburg. While construction has been completed, this property is currently seeking additional funds in for operations to begin.

MTPA is also in process of allocating concession opportunities, and developing the following sites:

- A luxury tented camp at Andover Nature Reserve.
- A floating restaurant and a boat cruise at the Blyde River Canyon Nature Reserve.
- Paradise Camp, a rustic accommodation facility and a hiking trail at the Blyde River Canyon Nature Reserve.
- A new accommodation facility at Bourke's Luck Potholes.
- A strategic partnership with the Aspinall Foundation for the development of Loskop Dam Nature Reserve where they have supported infrastructure upgrades. The vision is to restock wildlife, including black rhino and several species of cat. In time the stated intention is to expand the reserve to 100 000 hectares in total by including adjoining community reserves and land. This would be up from its original 23 000 hectares (Mpumalanga Tourism and Parks Agency, 2024). This planned development is approximately 50 kilometres north of Middelburg and Emalahleni. An emergent nature-based cluster could lead to substantial tourism flows to the area in the future.

Loskop Dam is already popular with domestic water sports and angling, and offers a few nature-based activities, such as hiking and ziplining.

A 2020 Steve Tshwete local municipality tourism plan identified the need for investments and governance arrangements at the Middelburg Dam and Botshabelo as two further visitor sites. Olifants Resort, Loskop Dam and Resort, and Little Elephant Craft Centre are also identified as sites offering potential for enhancements (Sigma International, 2020).

Major events in Mpumalanga include the Innibos Laerveld Nasionale Kunstefees, and the annual Mpumalanga International Film Festival. Major events taking place in the Coalfields region each year include the annual Middelburg Air Show, the Loskop Dam Marathon, the Rotary Middelburg Great Train Race, and the Loskop Kuper fishing Bonanza.

Dullstroom continues to be a major destination for domestic tourism, particularly farm-based activities such as fly fishing.

Recent tourism plans and strategies

The Nkangala District Municipality Marketing, Investment Promotion and Communications strategy identifies several challenges to tourism and heritage industries' development in the district. These are depicted in Figure 13, which follows (Nkangala District Municipality, 2023).

Figure 13: Challenges affecting tourism and heritage development in Nkangala

Source: Nkangala District Municipality, 2023.

The strategy proposes that tourism sites be packaged and promoted as well as motivates for investment in refurbishments and rejuvenations of key sites which support different niche market activities. These niche markets with potential for Nkangala are identified as ecotourism, cultural tourism, agritourism, business tourism, adventure tourism, and sports tourism:

- **A heritage route** is proposed based largely on Middelburg's heritage sites, linked to Delmas which has the graves of Ndebele kings and is known for the famous treason trial[4]; a mining museum proposal for Emalahleni; the regeneration of Botshabelo museum; Mapoch's Caves; and South Africa's oldest Blue Gum plantation in Belfast has also been identified.
- **A cultural tourism route** is to be based on the cultural craft work of the isiNdebele and other cultures. These include Kgodwana Ndebele Village and Museum in Limpopo, Ndebele Cultural Centre and King Mayitjha III Kraal as well as Ndebele dwellings along the KwaMhlanga-Ekangala road in the North-West of the province linked to the Loopspuit wine estate, among others. An annual Cultural Festival and Arts and Culture Centre of Excellence are proposed to market the work of two of the most famous Ndebele artists.
- **The ecotourism route links the** Loskop to the Mdala and Mkhombo, Nature Reserves Mkhombo Dam (popular with fishermen), Mdala Nature Reserve and Khethiwe Park in Siyabuswa, as well as the Roossenekal, Kranspoort and Aventura additional eco-tourism centres.
- **Adventure and niche tourism route** focuses on skydiving at the Witbank Skydiving Club and motor-cycle racing and quad biking. Rock climbing and mountain biking in Belfast are also noted opportunities.

Emalahleni and Middelburg are the main business events destinations, with one proposal suggesting that the current Emalahleni auditorium at the Civic Centre could be renovated and used as a pilot International Conference Centre.

The key sites for development in the strategy are indicated are described below:

- A nature reserve route from Dinokeng (in Gauteng) to Rust de Winter (Gauteng) to Vaalbank (Mpumalanga) to Loskop Dam.
- Development of Witbank, Middelburg and Vaalbank Dams.
- Refurbishments to the Loopspruit wintery and cultural centre.
- Redevelopment of the Steve Tshwete Cultural centre.
- Development of rock climbing at Waterval Boven (Emgwenya).

In addition, a high-altitude training centre, Ndebele cultural route, and International Convention Centre are mentioned, without clear locations. All the sites for development appear to be on or North of the N4. Major improvements to visitor information centres are also proposed.

The target markets are identified as domestic and regional tourists, particularly domestic tourists from Gauteng province and regional transient tourists from Mozambique and Eswatini (Nkangala District Municipality, 2023).

The recently finalised *MTPA Tourism Marketing Strategy* similarly proposes a number of themes for tourism development and for streamlining targeted communications with market segments. These segments are nature enthusiasts, adventure tourists, indigenous and historical routes, family, the Big Five, business tourism and sports enthusiasts. Major sites identified for these markets in the Coalfields include:

- For *nature enthusiasts*, Mabusa Nature Reserve; Mdala Nature Reserve; SS Skosana Nature Reserve; and Mkhombo Nature Reserve are the four provincial reserves in the North of the province. Nooitgedacht Dam Nature reserve is just north of Carolina.

[4] A three-year trial in Apartheid South Africa in the 1980s, it led to conviction of Moses Chikane, Mosiuoa Lekota, Popo Molefe, and Tom Manthata.

- Paintballing in Secunda is listed for *adventure tourists*.
- *Indigenous and heritage routes* are to include Nomoya Masilela Museum; Statue of Nokuthula Simelane; and Botshabelo Cultural Village.
- For *families*, Lake Umuzi waterfront at Secunda; Bethal Dam, a popular spot for camping, boating, water skiing and fishing; Hiking Trails at Loskop Dam Nature Reserve; and Game viewing by boat on the Loskop Dam.
- For *sports enthusiasts*, Forever Loskop Marathon: Ermelo Motor Racing Event ; Cosmos 3in1 Marathon: in Secunda; Belfast High Altitude Centre; Chrissiesmeer Sailing and various other water sports; Bethal Golf Club; Graceland Country Club Golf Course on the outskirts of Secunda; Bethal Dam, a popular spot for camping, boating, water skiing and fishing; Trichardt Equestrian Centre – on the outskirts of Trichardt just north of Secunda; Bass Fishing at Loskop Dam; Fly Fishing – Belfast, Dullstroom, Sabie and Mashishing.
- *Business tourism* is mentioned concerning Middelburg, in particular (Mpumalanga Tourism and Parks Agency, 2024b)

2.4 Structure of the sector

Tourism is a function of the provincial department of Economic Development and Tourism and is marketed and developed by the Mpumalanga Tourism and Parks Agency, which also manages several provincial tourism nature reserves. The MTPA has sub-programmes on marketing, development and registration. It has oversight of approximately 219 015 ha of formally protected areas (comprising of 26 Nature Reserves, which is equivalent to 3% of the Mpumalanga Province). Only 17 of the 26 are physically managed by MTPA – 13 of the 17 are 100% claimed by land claimants and integrated management plans are under development (Mpumalanga Tourism and Parks Agency, 2024a). Various challenges face many of the provincial nature reserves: poaching in Manyeleti Nature Reserve and illegal mining in at least four of the Nature Reserves, namely Blyde River Canyon, Barberton, Sterkspruit and Songimvelo (Mpumalanga Tourism and Parks Agency, 2024a).

The Lower Kruger Chamber of Commerce and Tourism is one of the regional business and tourism industry organisations. It is also the mandated partner for the district development model in the area, and has been active in developing a public-private partnership to address safety and security concerns around Southern Kruger National Park.

Middelburg Chamber of Commerce and Industry is another active private sector body representing its members in the Middelburg area. This includes the tourism sector.

Nkangala District Municipality has recently established an economic development agency to drive investment and tourism. A regional tourism organisation is being constituted for the district.

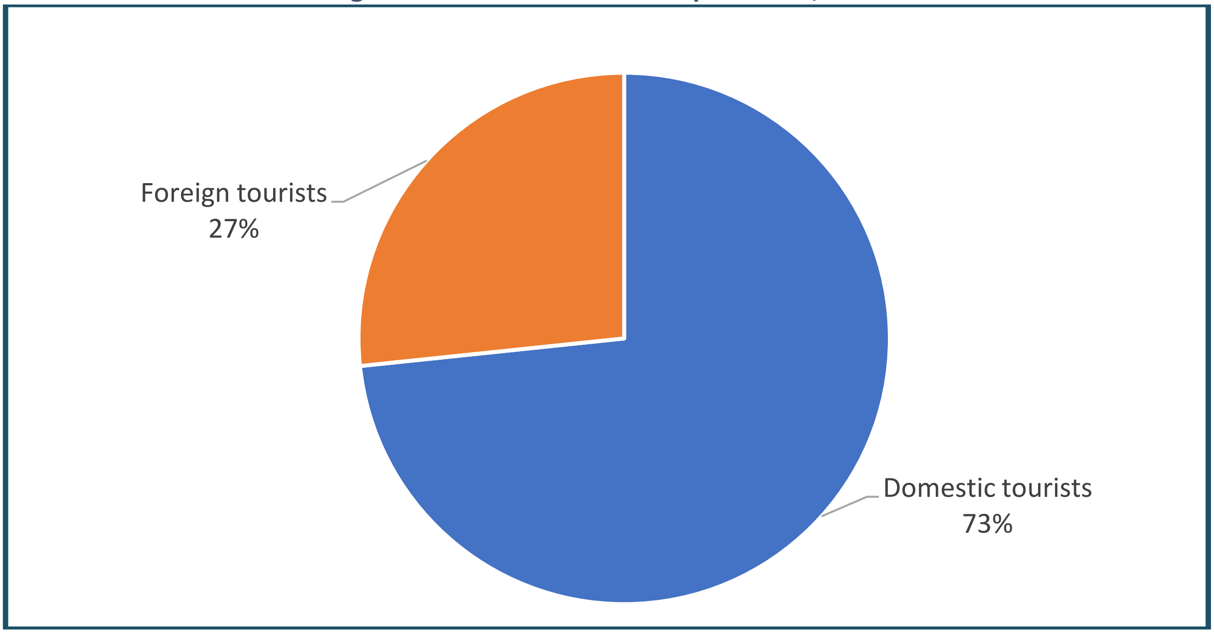
2.5 Tourism and employment

National tourism employment trends

Tourism jobs are calculated at a national level in the annual Tourism Satellite Accounts (TSAs) for which the most recent data is 2022. Annual TSAs combine a variety of data sources and align them within the national accounts' framework. This allows tourism to be fully measured as an amalgamation of different industries where tourists consume goods or services, and includes transportation, accommodation, food and beverage services, recreation and entertainment and travel agencies. Tourism consumption includes both "tourism-characteristic" goods and services (i.e. accommodation, travel services, cable cars) and "non-tourism-connected" goods and services (i.e. retail trade). The latter category of goods and services are consumed largely by non-visitors, i.e. residents.

The TSA indicates that in 2019 – the most recent “normal” year pre-COVID – total domestic tourism expenditure was R334 billion (73% of total), and foreign tourism expenditure was R121 billion (27% of total) (Statistics South Africa, 2024c).

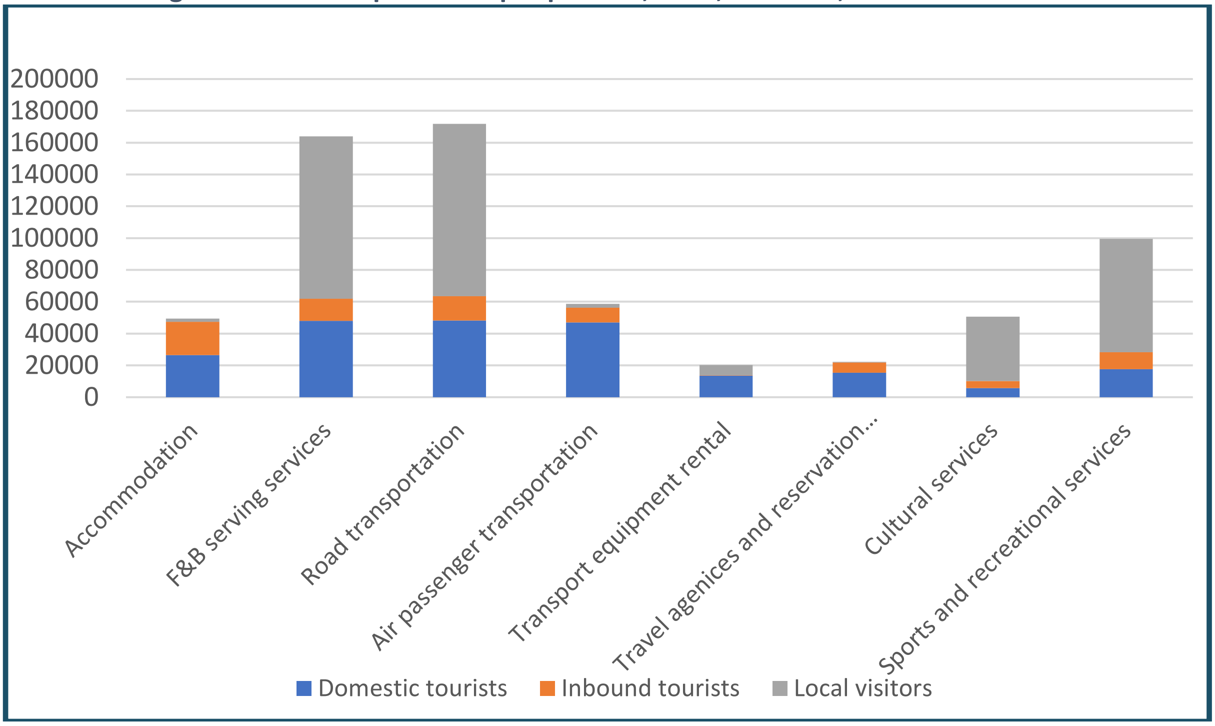
Figure 14: Share of tourism expenditure, 2019



Source: Statistics South Africa, 2024c.

Most tourism characteristic industries, where tourist expenditure is 25% or more of total consumption, also rely on local expenditure, i.e. from residents, not tourists. This is particularly the case for food and beverage serving businesses, sports and recreation, and cultural services. Accommodation, air transportation, travel agencies and other reservation services rely more heavily on tourists than residents (Statistics South Africa, 2024c).

Figure 15: Total expenditure per product, 2019, R million, and market share



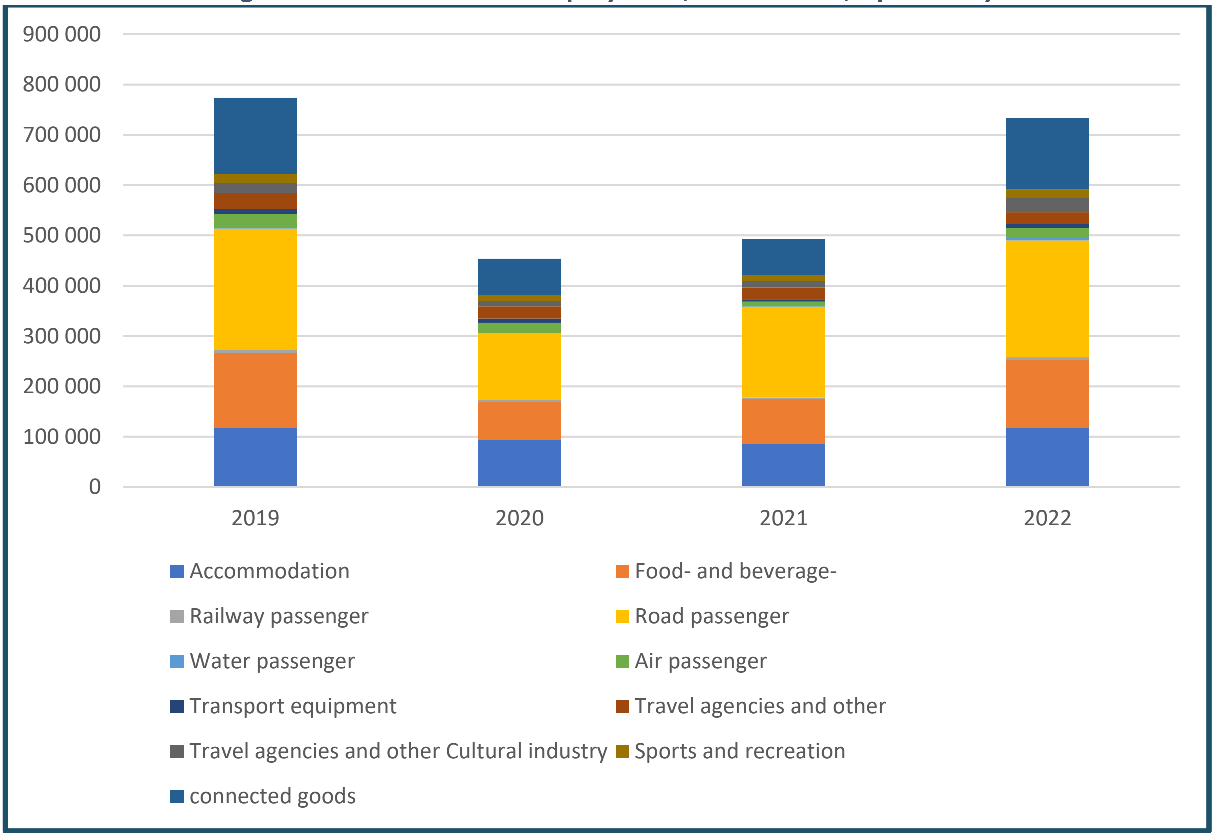
Source: Statistics South Africa, 2024c.

According to the TSAs for 2019, 2020 and 2021, direct tourism employment across tourism characteristic industries, across the country, declined by 323 572 jobs between 2019 and 2020, while in 2021, 38 447 jobs were recovered. In 2022, the number of persons directly engaged in producing goods and services consumed by visitors had almost fully regained 2019 levels – at 733 385. This was 4.7% of national employment in that year.

Much of the tourism recovery in 2022 was driven by strong domestic tourism, as foreign tourism had not yet recovered in numbers or expenditure. In total, domestic tourism expenditure grew from R195 billion in 2018 to R435 billion in 2022. The real growth in domestic tourism expenditure has been in non-specific products – i.e. on goods and services where tourism is not the major share of buyers, likely certain forms of retail, for example, such as food and beverages, other items.

Most jobs are in road transportation, followed by accommodation and food and beverage serving businesses. Retail trade is also a significant source of tourism jobs (Statistics South Africa, 2024).

Figure 16: Direct tourism employment, 2019 – 2022, by industry



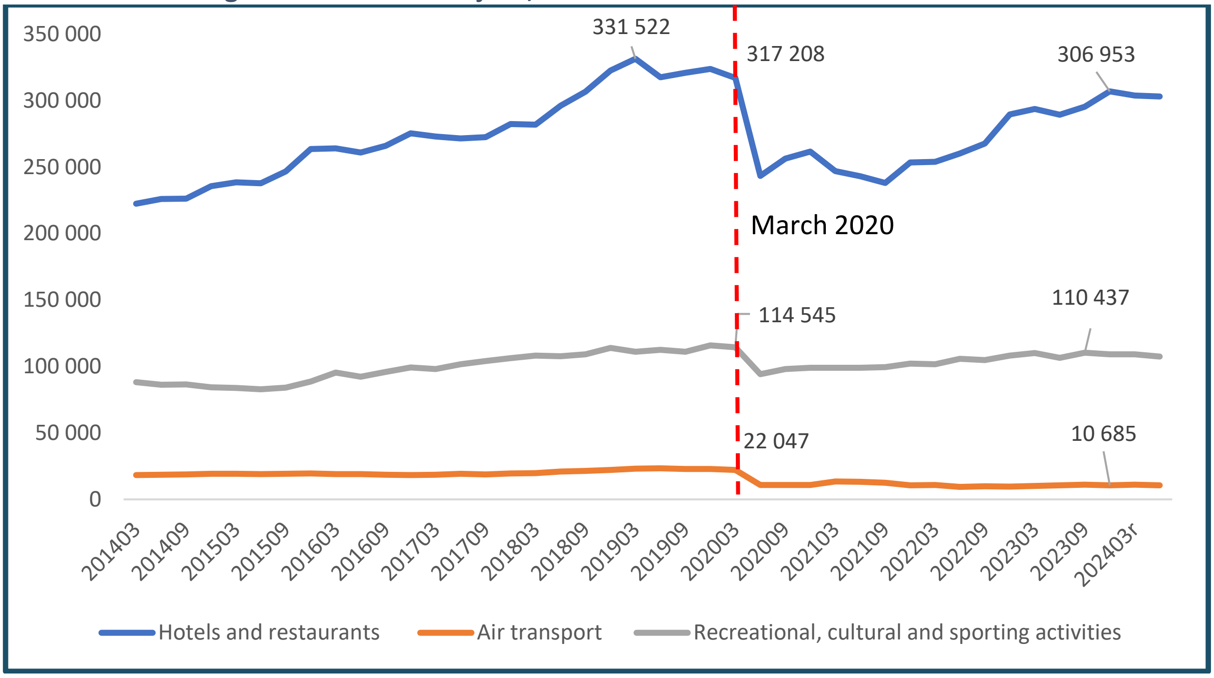
Source: Statistics South Africa, 2024c.

Tourism employment is seldom well captured in statistics, particularly at the subnational level, not only due to the complexity in measuring jobs across industries, but also as many tourism jobs exist in informal firms – that is, in an enterprise with less than five people, and/or the enterprise is not registered for VAT or income tax. Furthermore, tourism employment in certain industries can be seasonal, and some of the work in these industries may be described as vulnerable: characterised by inadequate earnings, low productivity, and difficult conditions of work.

Quarterly Employment Survey

In the Quarterly Employment Survey (QES), total jobs (i.e. tourism and non-tourism jobs) in “hotels and restaurants”, “recreational, cultural and sporting activities”, and “air transport” are measured as separate categories. By Q2 2024, these had not yet recovered to 2019 levels (Statistics South Africa, 2024).

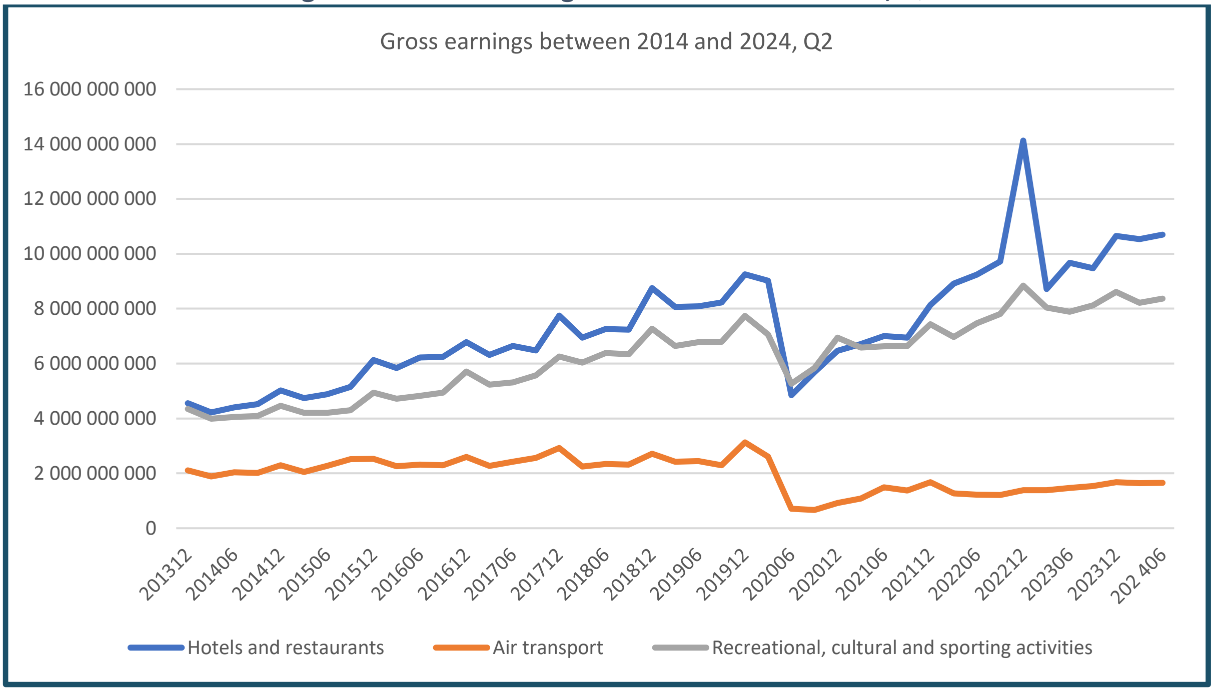
Figure 17: All national jobs, select tourism characteristic industries



Source: (Statistics South Africa, 2024d).

A similar, albeit more seasonal pattern, can be observed in employee earnings, as measured in the QES for Q2 2024. There is also a pronounced spike in employee earnings in December 2022, at R14 billion, compared with pre-COVID December pay periods, a traditional high season. It is unclear why this is.

Figure 18: Gross earnings between 2014 and 2024, Q2



Source: Statistics South Africa, 2024d.

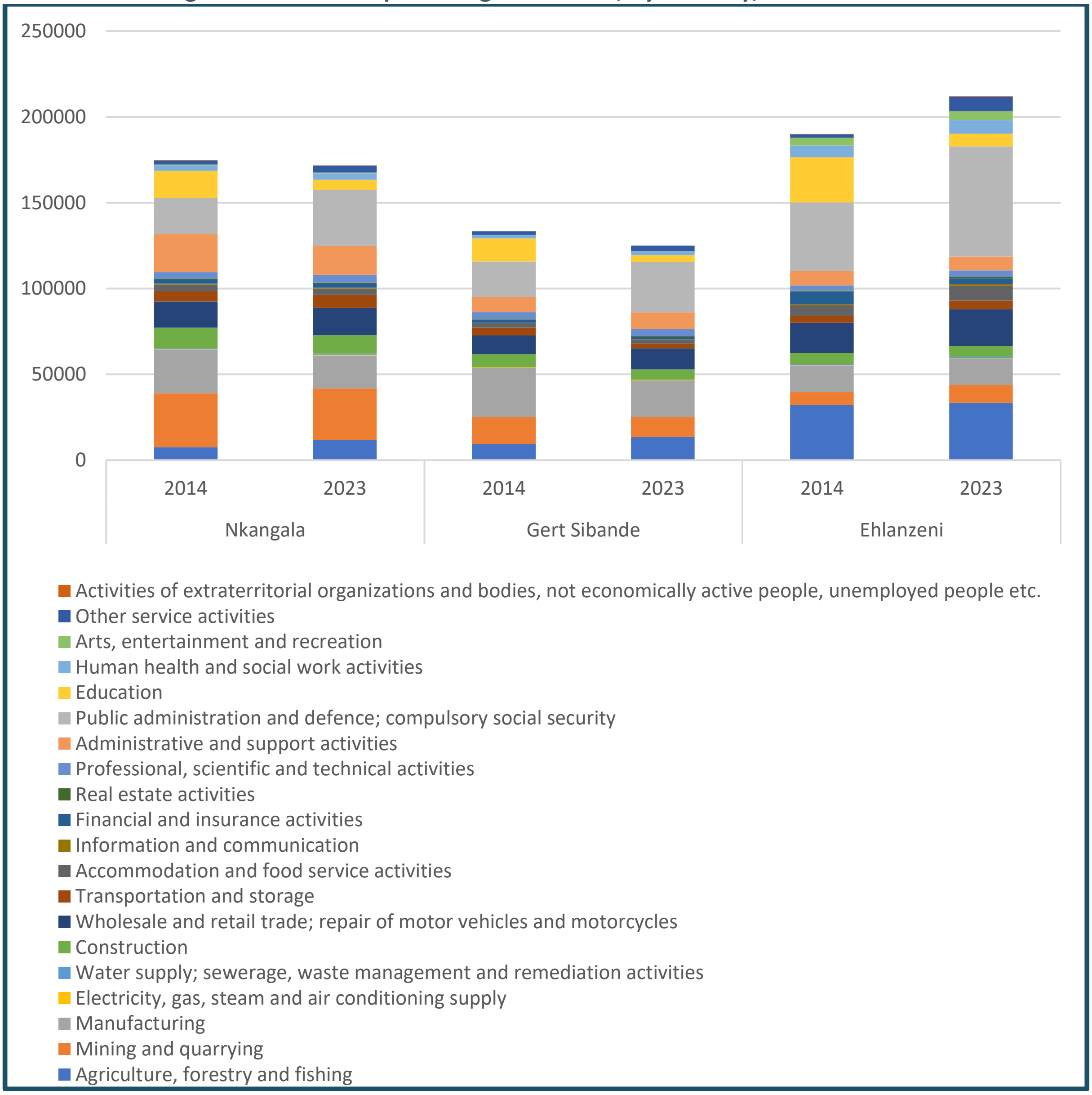
Local employment trends

South Africa's spatial tax data indicates the number of jobs per district municipality in 2014 and in 2023 based on administrative tax data. All three Mpumalanga districts rely heavily on public administration jobs, with Ehlanzeni having the largest share of employment in this industry and the largest growth between 2014 and 2023. Jobs in “education” experienced a strong decline over the period in all three districts (Spatial Economic Activity Data: South Africa, 2023).

Nkangala is most reliant on “mining and quarrying” for jobs, while Gert Sibande had the largest share of manufacturing jobs in 2014. This had declined by 2023. Ehlanzeni has fewer jobs in “mining and quarrying”, and “manufacturing” but far more in “agriculture, forestry and fishing” (Spatial Economic Activity Data: South Africa, 2023).

There are relatively few jobs in “accommodation and food service activities” and “arts, entertainment and recreation” in all three districts, with Ehlanzeni hosting the largest share of these jobs (Spatial Economic Activity Data: South Africa, 2023). Together, “accommodation and food service activities” and “arts, entertainment and recreation” accounted for 3% of all jobs in Nkangala in 2014, declining to 2% in 2023. In Gert Sibande, these two tourism characteristic industries employed just 2% of workers in 2014 and 2023. In Ehlanzeni the share was much higher at 6% of jobs in 2014 growing to 7% in 2023.

Figure 19: Jobs in Mpumalanga's Districts, by industry, 2014 and 2023

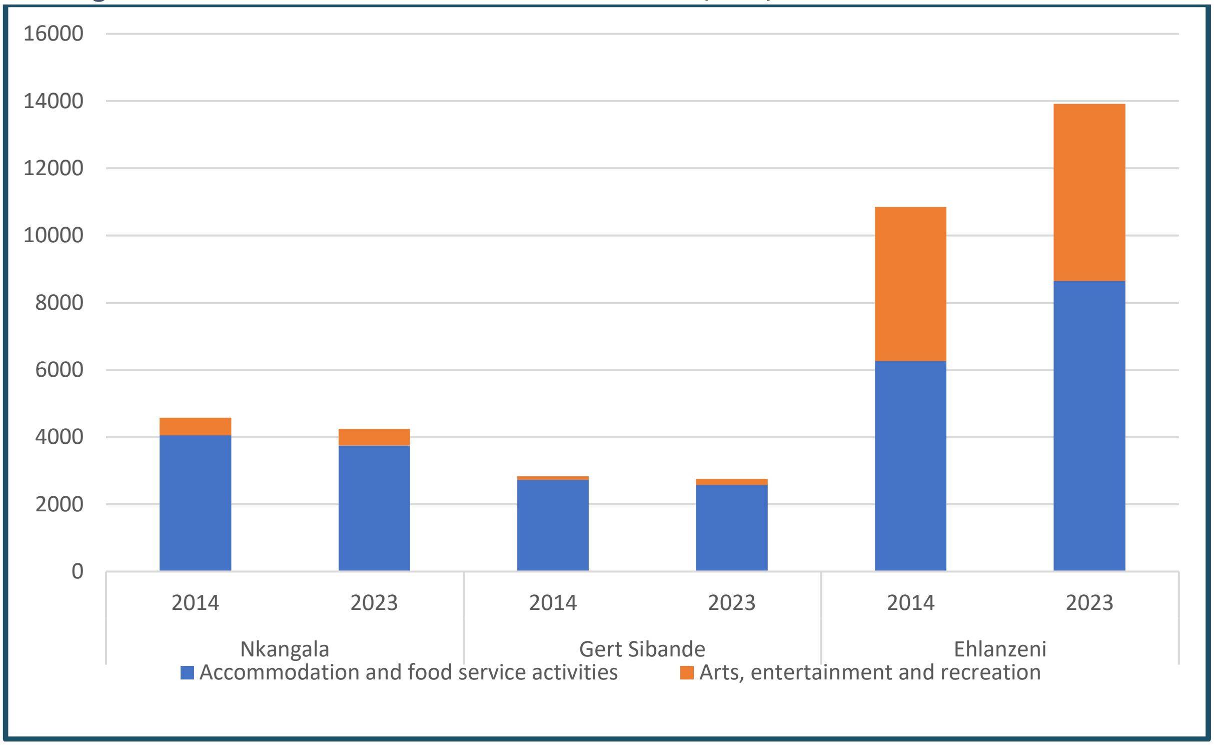


Source: Spatial Economic Activity Data: South Africa, 2023.

A closer look at "accommodation and food service activities" and "arts, entertainment and recreation" clearly indicates Ehlanzeni's relative strength, particularly in "arts, entertainment and recreation", likely due to the visitor attractions in the Panorama route, and the entertainment and events industry in and around Mbombela, such as the annual Innibos Arts Festival. Kruger National Park jobs are unlikely to be included in this dataset as SANParks does not pay taxes and would not be registered locally.

Furthermore, while the jobs in these tourism-characteristic industries declined slightly in Nkangala over the period, and stayed constant in Gert Sibande, they grew considerably in Ehlanzeni (Spatial Economic Activity Data: South Africa, 2023).

Figure 20: Jobs in accommodation and food services; arts, entertainment and recreation



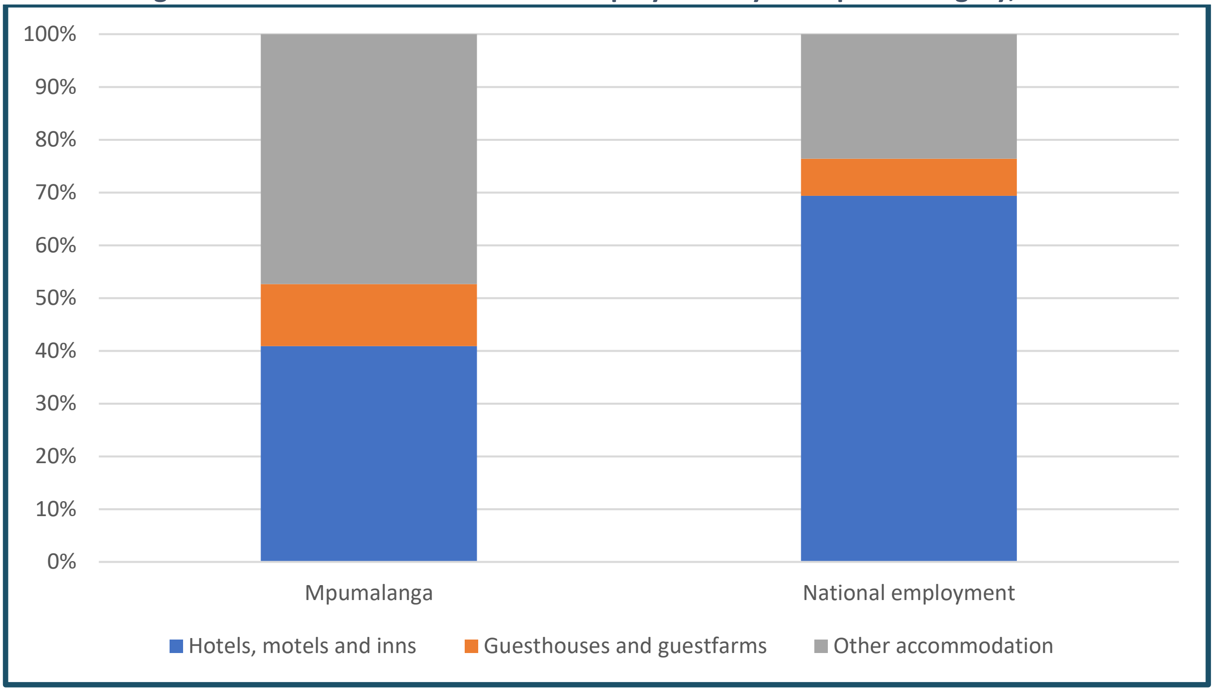
Source: Spatial Economic Activity Data: South Africa, 2023.

Statistics South Africa's Accommodation Survey, 2022

The number of jobs in Mpumalanga for the last pay period ended on or before June 2022 in the accommodation industry (in VAT-registered firms) grew from 6205 in 2018 to 6719 to 2022, while overall for the country, 20 000 job losses were recorded (reflecting the impact of COVID), bringing overall 2022 numbers to 83 869. Accommodation jobs increased in Limpopo, North West, Eastern Cape, and Mpumalanga, but declined in the Free State, Gauteng, the Northern Cape, KwaZulu-Natal and the Western Cape.

Much of the accommodation employment in Mpumalanga comes from "other accommodation" (Statistics South Africa, 2022e. This distinct pattern in Mpumalanga is likely due to the significant accommodation offering in and around Kruger National Park, comprised of luxury lodges, as well as many self-catering, and more informal properties on the periphery of the park.

Figure 21: Share of accommodation employment by enterprise category, 2022

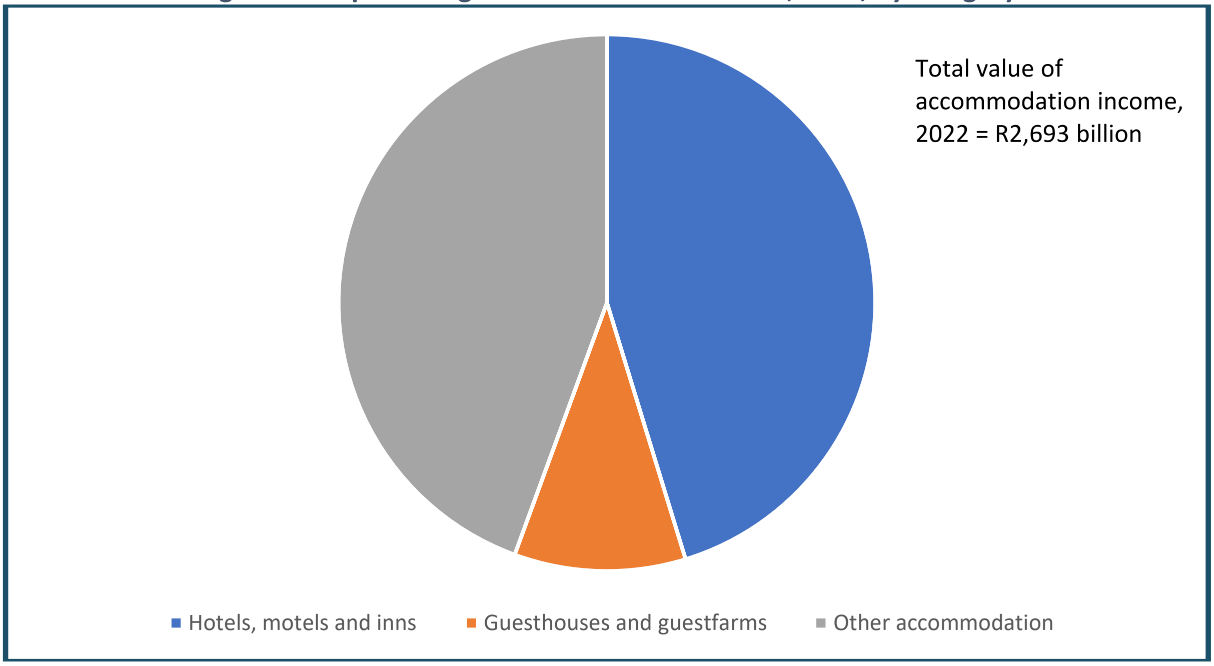


Source: Statistics South Africa, 2022b.

While Mpumalanga's accommodation industry employment was 5% of total jobs in 2022, accommodation income accounted to 7% of total national accommodation income (as a share of all VAT registered accommodation) in 2022 – although the value of this income dropped to R2.7 billion in 2022 from R3.45 billion in 2018 in Mpumalanga.

As with employment, income by accommodation categories in Mpumalanga was quite different from the rest of the country, with 44% of income earned in "other accommodation" and 45% in the category "hotels, inns and motels" in 2022. Nationally, "hotels, inns and motels" account for close to 75% of all accommodation income (Statistics South Africa, 2022e).

Figure 22: Mpumalanga accommodation income, 2022, by category

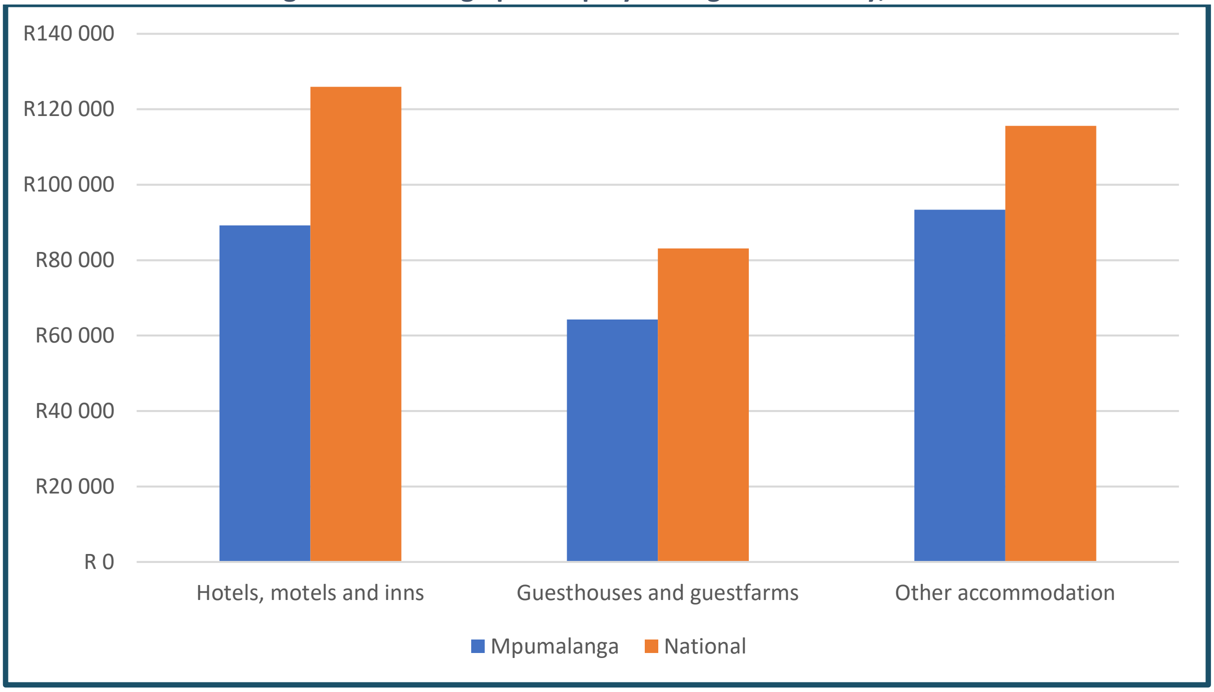


Source: Statistics South Africa, 2022b.

Nationally, the wage share by category of accommodation mirrors the income share. In Mpumalanga, however, the total wage share of “other accommodation” is 50%, while its income share is 44%. This is because the per-employee salary and wage in “other accommodation” is higher than in the categories of “hotels, motels and inns” and “guesthouses and guest farms” (Statistics South Africa, 2022e).

In 2022, the average annual wage in a “hotel, motel or inn” in Mpumalanga was R89 221, 29% less than the national average. Annual wages for employees in “guesthouses and guest farms” and “other accommodation” in Mpumalanga were also 23% and 19% less than the national averages for these categories (Statistics South Africa, 2022e).

Figure 23: Average per employee wages and salary, 2022



Source: Statistics South Africa, 2022b.

Detailed wage and employment data are not available at a provincial level for Mpumalanga for other tourism jobs. Nationally, however, in 2022, women were more likely to be employed across all three categories of accommodation, and part-time workers were 11% of total employees in 2022.

Business size and transformation

Large and micro-enterprises dominate accommodation employment, delivering 30% and 56% of all accommodation jobs respectively, while medium and small businesses accounted for 10% and 3% respectively. This underscores the role of micro-enterprises in supporting accommodation employment in the country. The definition of a micro-enterprise employed in the Statistics South Africa survey is a business with a turnover under R30.6 million per annum. For most tourism firms, this would include what is typically understood to be all SMMEs, not just micro-enterprises.

Women, particularly black women, dominate employment in accommodation and in food and beverage services too, but comprise far fewer employees, and a far lower share of employment in other tourism-characteristic industries, particularly road transportation, where women held less than 10% of jobs. Black South Africans comprised 76.5% of all tourism employees in the country in 2022. Data on jobs’ level is not available.

Up-to-date data on business ownership by race is also lacking. Out-of-date surveys indicate slow transformation in the sector (Government of South Africa, 2024), particularly at the small and micro-business level, where many businesses are family-owned. Access to well-located assets like land limit participation by many black South Africans. Slow transformation of the sector is recognised as a major weakness. A commitment to transformation is a key principle in the sector's masterplan (National Department of Tourism, 2023).

From a justice perspective, tourism development in the Coalfields should create opportunities for black South Africans, not only as employees, but as owners of tourism firms. While the firm level is not the focus of this study, strategies to leverage tourism's economic potential need to designed to support black SME participation and value creation.

2.6 Conclusion: Key takeaways

While Mpumalanga receives more foreign tourist arrivals than the Western Cape, these are mainly regional tourists who spend less than overseas tourists on a per capita basis. Not much is known about regional tourist travel patterns within the province, nor segmentation of these markets at a provincial level by purpose of visit. The overall low expenditure for regional tourists in the province results in the average expenditure per foreign tourist per trip in Mpumalanga being one-quarter of the Western Cape's, where foreign tourists are nearly all from overseas markets. For all foreign tourists, the most popular tourist sites are in the East of the province in and around Kruger and the Panorama Route, outside of the Coalfields, although these sites are less popular with regional tourists, than overseas tourists.

Domestic tourists in 2023 had a higher share of holiday and business purposes than prior to COVID, but this may reduce in 2024, as post-COVID travel "normalises". Domestic tourism volumes and expenditures are important for the province with overnight domestic tourists reaching three million in 2023. A total of 38.5% of all domestic tourists to Mpumalanga originated in Gauteng, with 21% from Limpopo and 33% from Mpumalanga itself. Mpumalanga also received 6.5 million domestic day trips in 2023. "Social activities" are important for domestic markets. Data on most popular towns or sites is not available for domestic tourists.

Of note is Graskop Gorge's success as a relatively new visitor site that attracts in the region of 200 000 tourists per annum, with most of these domestic tourists from Mpumalanga, i.e. intraprovincial tourists. Domestic tourists also frequent Dullstroom, particular on weekends and over holidays.

Supply-side plans

MTPA has been spearheading several projects at its nature reserves. Loskop Dam and its surrounds will be redeveloped through a 25-year agreement with the Aspinall Foundation which will consolidate land parcels and restock the area. A 2020 Steve Tshwete local municipality tourism plan identifies the need for investments and governance arrangements at the Middelburg Dam and Botshabelo as two further visitor sites. Olifants Resort, Loskop Dam and Resort, and Little Elephant Craft Centre are also identified as sites offering potential for enhancements (Sigma International, 2020).

MTPA's 2024 marketing strategy for the province identifies market segments (by interest or theme) and proposes the clusters or locations of sites that best match this demand. The Coalfields is under-represented in these clusters, other than for business tourists, indigenous and heritage routes, families, and sports enthusiasts, where much of the emphasis is placed.

The Nkangala investment strategy takes a similar approach to supply-side site identification and proposes these sites to be clustered for route development and investment.

Tourism employment

In 2023, total tourism jobs – across accommodation, food, transport, attractions, intermediation – had not fully recovered, although many of these industries achieved employment of 90% of pre-COVID levels. While the rest of the country lost accommodation jobs between 2018 and 2022, Mpumalanga saw an increase in accommodation jobs, although wages are lower in Mpumalanga than the national average.

Jobs in tourism can be precarious: they may be seasonal, low-paid, and unprotected. Furthermore, 56% of all accommodation jobs around the country in 2022 were in micro-enterprises, which had a turnover less than R30.6 million. This signals the importance of SMEs in tourism, and the relatively lower barriers to entry, but equally the highly fragmented and informal nature of the accommodation industry.

Local spatial economic data clearly indicates that of the three districts in Mpumalanga, only Ehlanzeni – outside the Coalfields – had a significant number and share of jobs in "hotels and restaurants" and "arts, entertainment and recreation". Tourism is a relatively small part of the local economy in the districts of Nkangala and Gert Sibande, where mining, and other industries dominate.

While Black South Africans dominate tourism employment, most tourism businesses in the country are white-owned and are also small and micro-businesses. Transformation of the sector is slow overall and while public data does not exist on transformation of tourism in the Coalfields, it is likely to mirror the national picture.

3. POST-MINING TOURISM AND AGRITOURISM: LESSONS FOR THE COALFIELDS

3.1 Purpose and approach

Drawing on a limited literature review, this section seeks to identify lessons from and characteristics of post-industrial and agritourism in South Africa and other parts of the world to inform the tourism potential of the Mpumalanga Coalfields. Google Scholar and specific online searches of resources such as UNESCO World Heritage Sites, South African sites for post-industrial tourism, and media articles have been consulted. Separate sections are presented for post-mining tourism and agritourism.

The research seeks to identify the enabling factors required for successful post-mining and agritourism development, particularly institutional and financial characteristics. Details on the types of visitor attractions and their proximity to markets are also considered, where data allows.

3.2 Background

<u>Post-mining land use</u>
Post-mining land use in South Africa typically falls into one (or a combination) of four main categories: agriculture, forestry, intensive recreation and non-intensive recreation (Cole et al., 2024). Similarly, globally, post-mining sites typically fall into the following categories, in order of occurrence:

- "Community and culture" which includes: cultural/historical precincts, reclamation art, museums or exhibitions of mining/industrial history, and community event spaces;
- "Conservation and eco-system services" which includes wildlife habitat, native woodlands, carbon offset and sequestration, and wetlands; 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.

Recreation and tourism are related but different concepts. Tourism refers explicitly to overnight visitors from outside of the area of the visited site. Recreation is a broader term and includes residents as visitors/users, day visitors (also not tourists, by definition) and tourists. The terms are used interchangeably in much of the literature on post-mining sites. Both tourists and other visitors will be important to future tourism developments in the Coalfields region. Globally, 94 sites of the 141 in a global stocktake were less than 50 km from a community or township i.e. located near people's homes (Keenan and Holcombe, 2021).

Tourism can be an important driver of economic diversification, including small towns in post-productive landscapes. Second-home tourism is one form of this kind of tourism, while niche or specialist interest tourism also plays a role (Rogerson and Rogerson, 2014). Specialist tourism includes segments or niches such as adventure tourism, agritourism, birding, fishing, food/wine tourism, sports tourism and nature-based tourism and heritage tourism (including post-industrial tourism). As discussed in Section 2, this niche or market segment approach has been applied to Mpumalanga tourism in both the latest (December 2024) tourism marketing strategy of MTPA and the Nkangala Investment strategy.

In practice, only a few attractions become major destinations on their own, with enough appeal and pull to draw tourists due to their scale and/or uniqueness (e.g. Kruger National Park, Sun City, Table Mountain). Many tourism regions have instead been built on clustering of multiple experiences, often comprising innovative SME offerings.

Post-mining tourism refers to sites and experiences based on mining industrial heritage, practices or built form. It can involve the redevelopment or revitalisation of places using industrial buildings and infrastructure – like mining pits, factories, and railways. The different landscape features within these major mining areas are often extensive and can include, 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 and characteristic urban" Policarpo and De Souza, 2024). Industrial heritage routes also exist in some regions connecting together different sites over many kilometres.

Agritourism typically involves visits to farms and activities linked to the farm experience. This can include accommodation, food, and beverages, retail and outdoor activities. Different types of agritourism are listed in Table 4.

Table 4: Agritourism types

AGRITOURISM TYPES	DETAILS
Farm tours	Tours of farms growing or manufacturing local produce that is typical of an area or region, e.g. coffee, tea, cacao, dates, honey, cheese, meat, olive oil. Visitors learn about the farm's operations, history and produce. This might include tours of crop fields, orchards, livestock areas and processing facilities. Farm tours are among the most common types of agritourism activities.
Food-tasting activities	Food-tasting experiences are often linked to a farm tour, like cheese tasting or a chocolate tour. Wineries and breweries can also include food experiences in their offering. Food and drink tastings are among the most popular agritourism experiences on the market today.
Wine, distillery and brewery tours	Wineries and breweries located in rural areas commonly offer tours and tastings. Visitors learn about the production process and sample local wines, beers and spirits. Visits to vineyards and wineries are very popular and common in wine regions all over the world.
Farm-to-table eating experiences	Guests enjoy meals prepared at the farm made with fresh, local ingredients sourced directly from the farm, like meat, cheese, vegetables, herbs, fruit.
Farm stays (also known as homestays)	Some farms offer accommodations for overnight guests to allow them to experience rural life firsthand. Accommodation might be in guesthouses or cottages, or camping facilities. Sometimes the farm stay offers guests the opportunity to partake in farming activities like caring for animals or harvesting crops.

Cooking traditional dishes	Cooking experiences are often created as part of a rural tourism experience and may be common while on a farm/home stay. People usually learn about local dishes and ingredients and may share a meal with the local family. Sometimes a visit to a local market to buy ingredients is included.
Educational workshops	Some farms may offer educational workshops and classes on topics like gardening, cooking, cheese-making, beekeeping, and sustainable farming practices.
Pick-your-own	Pick-your-own involves trips to farms to pick seasonal fruit and vegetables for personal consumption. These experiences tend to be seasonal and are especially popular with the family market.
Pesca-tourism	Pesca-tourism experiences involve learning about local fishing practices and fishing with local fishers to supply communities and markets with locally caught fish.
Visits to farmers' markets	Farmers' markets in rural areas provide opportunities for visitors to purchase fresh, locally grown produce, artisanal foods, crafts and other products directly from farmers and producers.
Animal encounters/petting zoo	Some farms have an area where visitors can encounter farm animals like cows, sheep, pigs, goats, llamas, chickens and ducks. This type of agritourism is particularly popular amongst families with young children.
Volunteering on farms	Volunteering on a local farm for a few days or weeks, or longer, are common experiences for people on a gap year or looking for an immersive longer-term experience.

Source: Acorn Consulting, 2024.

3.3 South African mining and post-mining tourism

South African tourism sites based on mining heritage include the Kimberley Big Hole, Gold Reef City, Pilgrims Rest and Okiep Copper Company Museum. Ebotse Golf Estate in Benoni is a post-mining residential development (Cole et al., 2024). Post-mining tourism in South Africa is centred on gold and diamond mining.

Diamond tourism sites

Cullinan and Kimberly are the best-known diamond-mining tourism destinations, with these small towns famous for their diamond discoveries. In Kimberley, between 2002 and 2005, De Beers Group invested R50 million in developing the Big Hole into a major tourism facility (De Beers, 2019). After its redevelopment, the Big Hole was expected to attract 80 000 to 90 000 visitor per annum. Recent data indicate that about 30 000 foreign tourists visited the site in 2023 (South African Tourism, 2024b), or close to 30% of all foreign tourists to the Northern Cape in that year. Data for domestic and local tourists is not publicly available, so total annual numbers are unknown.

The Big Hole development benefited from a public-private partnership between the provincial government, the Sol Plaatje municipality, Frances Baard District Municipality, Northern Cape Tourism and De Beers. The first phase of the development project included the refurbishment of some of the existing buildings into a 13-roomed guest house (at a cost of R2.3 million), a car park (at a cost of R3.8 million) and other entertainment facilities together amounting to R16.8 million. The second phase of the project, amounting to R32.91 million, was the development of the visitor centre which focuses on the story of the Big Hole, De Beers and diamonds. The creation of further retail opportunities, an upgraded viewing facility and a display of rough diamonds is also included (De Beers, 2019). The visitor experience starts at the Visitor Centre which provides guests with a tour led by a site guide, then a visit the museum and Old Town, including historical buildings.

Cullinan's Petra mines is still an operational diamond mine. It offers only surface tours. Cullinan is located in Dinokeng, close to Gauteng. Dinokeng is a major provincial tourism development, with a Big Five game reserve also offering visitor experiences. Cullinan is close to the most Northwest part of Nkangala district, with Loopspruit about 30 kilometres away. The Nkangala Investment strategy sees potential in connecting the nature base route linking Dinokeng with Rust de Winter, Mdala and Mkhombo nature reserves. Data is not available on the performance of the Cullinan diamond tours.

Gold mining sites

Gold mining tourism experiences at *Gold Reef City* in Johannesburg form part of the broader development of the Gold Reef complex, which also has a casino, convention centre, hotels and a theme park. According to News 24 (2014), the gold mine at Gold Reef City attracted 3500 visitors per day in 2014. Gold Reef City's Heritage Tour provides an interactive historical experience of the discovery of gold on the reef. It includes a 75 metre deep underground tour with a live gold pour, "meeting" a schoolboy and prospector from the 1880s, visits to historical museum houses, and a visit to one of the last gold bullion trains which moved gold between Johannesburg, Durban and Cape Town (from 1911 until 1967). The gold mine is part of the broader theme park experience and is entirely run and executed by the private sector. A key visitor market is school children.

In Mpumalanga, *Pilgrim's Rest* has long been an established post-mining tourism destination.

Visitor sites for tourists in the town include The Diggings (now routinely the site of illegal mining), as well as multiple museums and historic sites linked to the gold rush, with 89 historic buildings on its main road. The town was declared a National Monument in 1986 as a living memory of the early gold rush days in South Africa. The Mpumalanga Department of Public Works, Roads and Transport is responsible for the management of the museum town. In 2012, existing business operators were required to reapply for the right to occupy and trade on the premises and the ensuing legal battles led to disinvestment and a deterioration of the town.

Then, in 2018, 10-year contracts were allocated which led to more stability and investment in improving the town. More recently, 2024 media reports indicate that illegal mining has disrupted the town's tourism and heritage sites. Water is also allegedly contaminated from the illegal operations (SABC, 2024)

Pilgrim's Rest was the 7th most visited tourist attraction by international tourists to Mpumalanga in 2023, with 13.1% of the surveyed tourists (or an estimated 234 000 of 1.8 million international tourists in that year), identifying the historic gold mining town as a tourist attraction they have visited (South African Tourism, 2024b). The recent illegal mining activity has severely impacted tourism in the area and the businesses and jobs it supports.

In *Barberton*, also known for its gold heritage, tourists are offered different tours, such as gold panning tours, a visit to Bray's Golden quarry, guided heritage walks and underground mining tours. Trips to Eureka City, a close-by "ghost mine town" are also offered (Barberton Tourism, 2025). Barberton is a less established gold tourism destination than Pilgrim's Rest and is also located further south from the Kruger National Park and Panorama route.

Close to Barberton, *Komati Springs*, once an asbestos mine, was rehabilitated in 2002 and is now a large open water hole and a joining cave system used for technical dives. It is located in the Nkomazi Game Reserve. The site has an open water section that is 110 meters long and 50 metres wide, and a cave system with eight levels that range from 9 metres to 186 meters deep. The site is filled with old mining equipment and crystal-clear mineral water (PADI, n.d.).

Gold Reef City, Cullinan, and Barberton do not appear within the top 10 tourist attractions visited by international visitors in the provinces of Gauteng and Mpumalanga, respectively.

Few coal mine tourism attractions exist in South Africa. In *Dundee*, in KwaZulu-Natal, the Talana Museum includes the history of coal mining in the area, as well as Battlefields and Zulu heritage, and Gandhi's time living in the area.

3.4 International post-mining tourism case studies: characteristics and lessons

Global post-mining tourism overview

Many examples exist of post-mining tourism around the world. Much of the scholarship is from Europe, with research articles largely concentrating on that region.

Mining tourism includes many kinds of experiences and multiple sites. Some of the more prominent ones mentioned in the literature are listed below. These demonstrate the range of tourist attractions and activities linked to mining heritage:

- In the United Kingdom, eight of the 28 UNESCO sites are linked to industrial heritage including old coal mines in South Wales. In Northumberland, Northumberlandia: The Lady of the North is a landscape sculpture of a reclining nude that has become a major attraction. It was sculpted from 1.5 million tonnes of coal mine overburden. The landform is covered in a biodiverse sward and is managed by the local wildlife trust. Ownership was passed to the not-for-profit Land Trust, along with an endowment from the mining company, which is used for managing the site's long-term liabilities (Whitbread-Abrutat, 2024). The world-renowned Eden project in the UK changed a clay pit mine in Cornwall into a tourist centre which includes biomes which house a large indoor rainforest (Digby, 2012).
- The United States has 55 mining museums falling under the American National Mining Association. One such museum, at the Homestake gold mine in South Dakota, is at the site of what was the largest and deepest underground gold mine in North America before closing in 2002. The mine shafts and pit infrastructure have since been re-purposed into an underground national science lab, and the processing plant remodelled to a casino-resort (Deux, 2010 in Cole et al., 2024). In Lackawanna, a coal mine tour in Pittson provides underground gangways and rock tunnels, and is led by a miner who can describe life under the ground.
- Germany has well known mining tourism locations including the 300-year-old Himmelfahrt silver "show" mine and UNESCO heritage sites in the Ruhr. (See Case Study 1, which follows). In eastern Germany, certain former open-cast mines have been filled with water to create lakes.
- The European Union's (EU's) European Route of Industrial Heritage originated in Great Britain, Germany, and the Netherlands. It now includes more than 850 industrial heritage sites in 44 countries and is supported by an association, which is a registered charity under German law and has two governing bodies: a Board and the General Assembly. Two sources of funding exist: membership fees from the association's members and, since 2014, project funding from the EU through the Creative Europe programme (European Route of Industrial Heritage, 2025).
- On the European Route of Industrial Heritage, in Belgium, four Walloon museum sites have formed the World Heritage Site "Major Mining Sites of Wallonia" (Helfer, 2021)
- In Finland, 35% of post-mining sites have developed commercial and public culture and recreational activities. Examples of visitor infrastructure include museums, a mining themed holiday village, restaurants, cultural events, a motorsport venue, a nature/ geological trail, bird watching, a gold and disc golf course, greyhound racing, shooting ranges, and dirt bike tracks. These are all examples of this infrastructure. At least nine water-filled open pits are popular dive sites (Kivinen, 2017).
- In Japan, many post-mining sites stand as living museums, for example, Iwami Ginzan silver mine, Gunkanjima, and the Sado gold mines. At Akabira (Hokkaido Island), dumps and heaps mounded from waste rock are used as a ski slope.

- In Changsha, China, the Dawangshan Pit, an opencast limestone quarry with over 40-years of mining history, has been converted into a five-star hotel and theme park: the Intercontinental Shanghai Wonderland Hotel project and the Ice World and Water Park project (Tan et al. 2019).

Festivals and events are sometimes held in old mine infrastructures: the Zasavje region in central Slovenia hosts festivals in industrial buildings and offers mountain biking, rafting and hiking including on remediated sites (such as the Europark recreational area). The Austrian mine and steel region of Steirische Eisenstrass holds an annual Erzberg-Rodeo motocross event with 50 000 attendees in the active open cast iron ore mining site and an alternative music and arts festival, Rostfest, is in the mining town of Eisenerz (Campbell, 2017)

In 2020, Rabkina and Pavlova and Valco analysed the websites of 30 industrial and post-industrial tourist destinations to identify common features and trends. These are listed in Table 5. These have been organised into categories for ease of reference. Outside of the visitor experience itself, it's worth noting the characteristic of strong partnerships with multiple entities, and local community significance. One common practice is the employment of past mine workers as tour guides, or similar.

Table 5: Common trends – industrial and post-industrial tourism destinations

LOCAL COMMUNITY SIGNFICANCE	USE OF TECHNOLOGY	LINKS TO NATURE	LINKS TO CREATIVE INDUSTRIES	WOW FACTOR	LINKS TO VARIOUS FACILITIES	HISTORICAL SIGNIFICANCE	AMENITIES	VISITOR MARKETS	PARTNERSHIPS
They tell the story of their local community and its way of life. They reconstruct authentic houses, build replicas of home and shop interiors, conserve or sometimes construct whole authentic-looking streets.	To create an interactive environment, museums combine authentic working equipment with modern technologies (e.g. 3D displays or interactive kiosks).	Museums take advantage of the surrounding landscape to organise view points and hiking routes, as well as use prominent landscape features on their branded materials.	Industrial museums support local artisan production and local industries by providing space for craft fairs, art exhibitions, and workshops. In return, they may acquire unique souvenirs.	Some unique feature or an artefact – a once-largest installation, the first-of-its-kind apparatus, or a never-before experience – can become the core of the museum's concept.	Objects of industrial tourism tend to gather in clusters so one route might include visits to operating enterprises, closed heritage sites, related industries, museums of local lore, as well as indoor and open-air places of interest.	Industrial museums tend to present their local industry as part of the world history.	Museums offer all necessary facilities and services, including public catering.	Families are becoming a primary target audience for industrial museums so they organsze special diversified programmes for all ages.	Industrial and post-industrial tourist organisations seek partners among all sorts of social Museums organise field practice for students, providing venues for scientific conferences, welcoming schoolchildren on career days, etc.
Museums invite professional industry workers, e.g. retired miners, to work as guides.	Museums make use of the Internet sites, social media.	Tour organisers try to emphasise the industry's environmental improvements	Museums integrate art related to the main concept by holding contests, exhibitions and other events.						Heritage sites seek financial support from businesses and trusts and can adjust their activities to meet their needs.

Source: Rabkina, Pavlova and Valco, 2020.

Edwards and Llurdés Coit identify the need for further common elements such as substantial institutional support, environmental remediation, and marketing and publicity (Edwards and Llurdés Coit, 1996). Certain of these elements are considered in the case studies, that follow

Case Study 1: The Ruhr region's diversification and tourism

Ruhr (Ruhrgebiet) is a densely populated urban area in the German federal state of North Rhine Westphalia. It is home to four rivers: the Rhine, Emscher, Lippe and Ruhr. Once a major coal mining region, the last mine closed in the Ruhr, in Germany, in 2018. Worker numbers in coal declined from 479 316 in 1955, to only 3 371 in 2018. Economic restructuring has gone through different phases: initially, top-down structural policies resulted in continued investment into the mining industry by large businesses, as well as ongoing support for these industries from trade unions. From the late 1980s, the approach changed to one of "regionalised structural policy", which included more local initiatives and more actors.

Metropole Ruhr was chosen as Europe's Cultural Capital in 2010 alongside Istanbul in Turkey and Pecs in Hungary, which contributed to number of tourists who visited. Zollverein received 2.2 million visitors in that year.

Emscher park

Emscher Park is located in the central part of the Ruhr area. The Emscher River was seriously polluted and, in response, the government of North Rhine-Westphalia initiated the International Building Exhibition programme. This ten-year programme (1989-1999) was overseen by a planning company and launched 120 individual projects. It created an organisational form for dialogue and collaboration between stakeholders. Such regional development coalitions have been an important foundation for the built-up of new industries in the Ruhr through processes of related diversification (Coenen, 2017)

The diversification has included the creation of a regional park and projects to address the old slag heaps. Several thematic tourist driving and biking routes were created, including the Route of Industrial Culture. Together these routes create and improve green infrastructure; provide more recreational opportunities; appeal to tourists; and increase the understanding of the region's heritage among local residents as well as visitors. The park has transformed one of the most degraded landscapes in Europe into an area which has symbolic and new industrial value. Today, the most famous tourist attractions of Emscher Park include:

- Gasometer in Oberhausen,
- Zollverein Coal Mine Industrial Complex in Essen,
- Industrial Landscape Park Duisburg-Nord, and the
- Artificial hills - tips, bike paths, etc.

Gasometer in Oberhausen

Gasometer was converted into an exhibition hall with panoramic elevators that lead up onto the roof, providing remarkable views of the whole of the western Ruhr. To date, more than three million tourists have visited Gasometer, which has become a symbol of Oberhausen (Gasometer, 2025).

Zollverein coal mine industrial complex

This site was declared a World Heritage Site by UNESCO in 2001 and covers 100 hectares in three parts: Shaft XII, Shafts 1/2/8 and the Coking Plant. Zollverein attracts large numbers of tourists. According to some estimates, around 1 500 000 visitors a year. Once the largest colliery in Europe today it combines culture, gastronomy, design, architecture and handicrafts.

The major attractions of the Zollverein complex include: The Ruhr Museum, the Portal of Industrial Heritage, Zollverein memorial trail, Palace of Projects (formerly salt storage, but now building with

16 rooms and 65 projects that represent the utopias of our time), Sun Wheel (Ferris wheel on solar power, which offers view of the entire Zollverein complex and city of Essen), an installation which is a swimming pool and also a work of art and ice rink.

<u>Industrial landscape park Duisburg-Nord</u>
Located in the city of Duisburg, the steelworks were transformed into a park and cover more than 500 acres of mostly open space. Visitors can see: blast furnaces, an adapted gasometer (converted into the largest diving centre in Europe with artificial reef and sunken yacht), former ore storage bunkers containing alpine climbing gardens, the large square Piazza Metallica (where performances and festivals are held), gardens Sintergarten and Bunkergartens, and large metal pipes passing through walls which are used as slides for children, and so on. Within the park is also a visitor's centre and a restaurant. The steelworks are illuminated at night.

<u>The development of "tip tourism"</u>
Slag heaps or dumps have been recultivated to return them to the previous state (at least in part). Slag heaps are a typical part of the landscape in coal mining regions. Hoheward tip is located in the north of Ruhr, and is one of the most attractive tips. The tips are part of the Industrial Heritage Trail and Hoheward Landscape Park. On top of Hoheward, there is an Obelisk, Sundial, and a Horizontal observatory. Another attraction is the 165-metre-long Dragon bridge for pedestrians and cyclists (Copic et al., 2024).

Institutional and financing lessons

The region's transition efforts (which include but are by no means restricted to recreation and tourism) are seen as successful as a result of worker-focused policies with decades of region-wide, forward-looking structural policies and massive public investments. The region's economic diversification was supported by significant investments from European, federal, state and municipal budgets, supporting infrastructure, education, tourism, culture and the service sector.

Many initiatives built on the region's heritage and desire to preserve it led to a focus on environmental technology, engineering, commodity transport and large-scale sociocultural projects. Tourism falls within these sociocultural projects. Universities and higher education institutions played a significant role in this transition. By 2014, Ruhr had 22 universities with more than 250 000 students (World Resources Institute, 2021). In addition to supporting other industries, these students would have been a key visitor market, bringing energy and innovation to the visitor spaces and operations .

Source: Summarised and adapted from World Resources Institute, 2021, Copic et al., 2014, and Coenen, 2017

Case study 2: Post-industrial tourism in Bełchatów

Implementation of the Just Transition Mechanism under the European Green Deal is shaping the development of the Bełchatów industrial district in Poland. The lignite mine will be closed in the 2030s. Regional authorities and the state government have identified leisure tourism as having development potential.

The Bełchatów industrial district in Central Poland includes several cities and rural villages located across three counties. The area is 1 292 square km, and is populated by 130 594 inhabitants, living mostly in the city of Bełchatów (which has 56 419 residents). The local economy and labour market remain in relatively good condition although growing unemployment among women is a distinctive feature. The majority of employees work in the industry and construction sectors. Most businesses operate within the private sector.

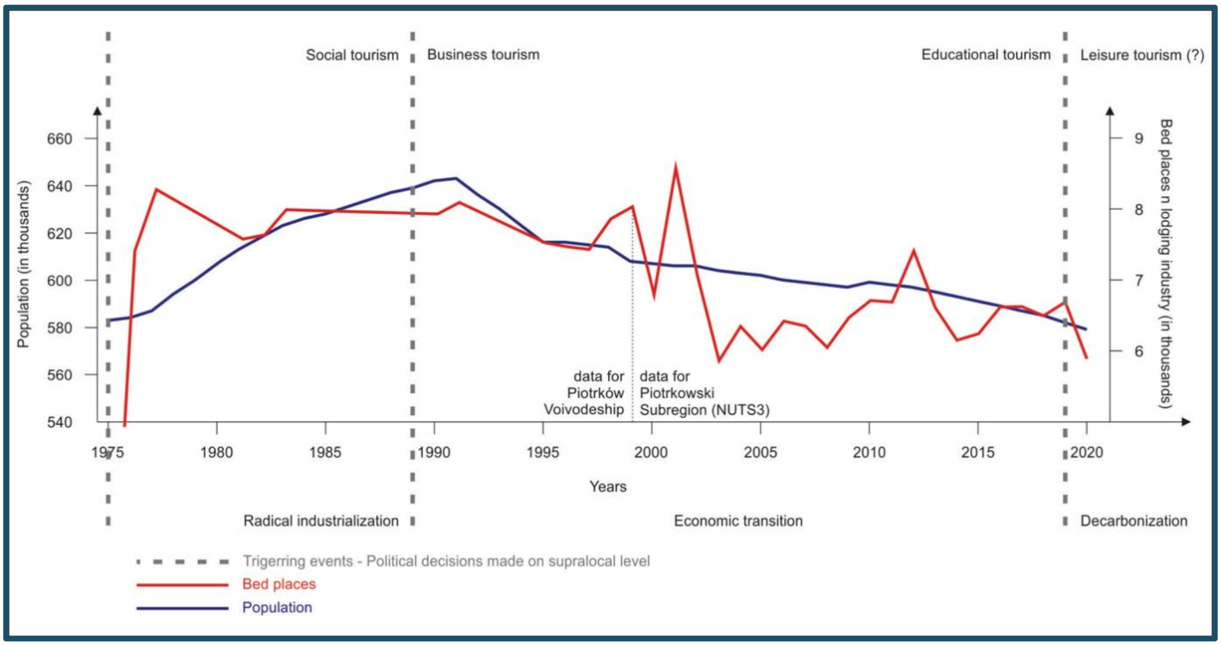
The Bełchatów Power Plant in Poland is responsible for the greatest share of CO_2 emissions in the entire EU. The authorities of the Łódzkie Voivodeship, along with energy company PGE, have set a schedule for shutting down the plant between 2030 and 2036, with full closure in 2038, when lignite mining in the district will end.

Tourism has a long history in the area – and despite expectations that the mining and energy industries on the one hand, and tourism, on the other, cannot coexist – the reality is that there has been co-evolution with the industrial character of the area heavily influencing the kinds of tourism that has emerged.

Originally an agricultural area, tourism developments in the region began with holiday villages along the Warsaw-Vienna railway line made of second homes – or summer homes particularly. But it was with the industrial development of the Bełchatów Mining and Energy Complex in the mid-1970s that major tourism growth began. Social tourism was developed driven by the amenities and services needed by the industries and their workers. There was a major demand for accommodation for builders, and mine and power plant employees.

During this period, the land was enormously transformed by industrial operations, which resulted in significant environmental impacts including earth tremors, landslides, and risks to ground freshwater. Noise and air dust content, as well as the combustion of millions of tons of lignite, released toxic heavy metals, gases and particulate matter into the atmosphere for many years. Negative impacts were also experienced in cultural heritage with towns, building, heritage objects being lost during the development of mining and energy complex.

Figure 24: Triggering events of tourism and industry development



Source: Napierala, et.al, 2022.

Negative environmental impacts from the mining and energy industries reduced the leisure potential of the area, and leisure in the Bełchatów industrial district relied on the creation of two artificial reservoirs, Wawrzkowizna and Słok. Both were located on the Widawka river. Sport and recreation centres were established in their vicinity. These were financially and organisationally supported by the mine and the power plant as a part of their corporate social responsibility. At the time this included subsidised excursions, self-arranged domestic holidays, as well as bed and board offers in local and non-local areas.

Business tourism – meetings, conferences and exhibitions – grew after 1990, with the establishment of the PGE company in the Bełchatów industrial district. Several hotels and conference centres were also developed. Business tourism was the main purpose of tourism to the area in the 1990s and 2000s.

In 2014 an industrial heritage exhibition entitled PGE Giganty Mocy led to the development of educational tourism in the area. It showed the processes of lignite mining and energy production in the Bełchatów region and drew in many visitors, particularly school children, and families with children.

With the decline of mining and its associated energy generation industries, leisure tourism has been recently identified as a new growth sector. Much of the development of tourism in industrial regions is based on natural assets or industrial heritage and the Bełchatów industrial district does not have any extraordinary natural environment. Revitalisation of mine sites will be necessary with tourism development plans including:

- Developing two lakes in the Bełchatów pit accompanied by a recreation, tourist and cultural centre.
- A 760-metre-long ski route with a ski lift, cycling and off-road vehicle routes (as well as a wind power plant have been developed on Mount Kamieńska – the external dump of the Bełchatów exploitation field.

The proximity of Łódź and Warszawa with aging populations may lead to developments in the spa and wellness niche as one of the future core functions of the area.

Institutional and financing lessons

As part of a just transition, Belchatow is early on in its transition away from lignite coal towards a diversified economy. It has been suggested that the institutional level will determine how successful the transition is. It is further noted that experiences from elsewhere indicate the critical role of private entities for the development of diverse industries.

Much of the funding to date has been from external sources (the EU) and has supported individual projects by local government, and is not aligned to a regional development vision that guides overall long-term strategic competitive advantage. Regional coordination is lacking, as is the capacity of the state, and other actors need to be supported to improve regional competitiveness. This is summed up as follows: “Implementing change requires a clear and precise development vision, which considers the interests of individual subregions in the Basin. At the moment, this area faces the challenge of developing a strategy for the entire region” (Zak-Skwierczynska, December 2022).

Source: Summarised and adapted from Napierala et al., 2022
and (Zak-Skwierczynska, December 2022)

Case Study 3 : Nord-Pas-de-Calais, in northern France

Coal was discovered in North-Western France in 1849. As a result of the damage during the Second World War, nearly all French coal mines were nationalised in 1946 and 18 companies were merged to form the state company Houillères du bassin du Nord et du Pas-de-Calais. The peak tonnage of production was reached around 1959 (Helfer, 2021). There were declines in tonnage from the 1960s and a rapid reduction from the 1980s onwards. The major economic slump in the early 1990s from de-mining resulted in nearly 200 000 jobs lost in the broader region and a high unemployment rate. This was 20% between 2000 and 2010, double the national rate (Council of Europe, 2025).

Successive urban and territorial planning actions have been embarked on for decades to try to diversify the economy, stem out-movement of the population, and address increasing levels of unemployment. Territorial “reconversion” plans were developed from 1955 onwards until the official closure of the last coal mine in 1990. Key characteristics have included investments in new industrial development; infrastructure improvements (roads, housing, etc.); environmental regeneration; legal and management reforms, with, over time, regional financing that has involved local actors; the emergence of new political formations in response to local needs; and cultural reimaging (construction of a positive memory and image of the region, including through the Louvre-Lens). Between 1970 and 2000, most mining facilities were demolished.

On the environmental regeneration front, a reforestation policy has focused on biodiversity and ecological networks. Slag heaps (terrils) have been recognised as landscape entities. In Lens, an important coal mining town, the pithead 11-19 in Loos-en-Gohelle, a quarter in the north of the city of Lens, contains a mine pit with a headframe from the 1920s and a concrete extraction tower from 1960, the only one of its kind preserved in this basin. The town boasts art deco architecture and two massive heaps at a height of 186 metres. It houses the Centre for Environmental Initiatives Chaîne des Terrils (slag heap chain) and some other environmental institutions and initiatives. It is promoted as a site of sustainable development (Helfer, 2021).

Since 2000, the major regional planning effort has been on post-industrial area restoration.

Mission Bassin Minier, created in 2000 and set up in 2002, is the institution tasked with the area's redevelopment using regional planning and development. Its missions were initially framed in the territorial section of the "After-Mines" of the State-Region Plan Contract in two main areas:

- The urban, social and ecological restructuring of the mining basin, including consideration of mining heritage, and
- Strengthening project engineering, a necessary condition for the planning and development of territories.

The Mission provided technical assistance to the State and the Region by conducting an interministerial study on the development and networking of mining heritage which ultimately resulted in its UNESCO World Heritage Site status in 2012, which generated pride among local residents. The listing includes 353 properties at 109 individual sites including the four best-preserved former mines and one of the oldest mining settlements in the area (Helfer, 2021).

In 2013 there was a further recommitment to these aims and around 150 stakeholders from civil society, academia and business, as well as elected officials and representatives of state and regional administrations attended thematic workshops on urban planning, transport, health, training and economic development. This produced a shared diagnosis accompanied by 120 strategic proposals for the region.

The 2018-2020 agreement for the organisation defined three major strategic priorities:

- The management of the UNESCO World Heritage Mining Basin Property and the proper implementation of the management plan,
- Improving the promotion of the cultural and tourist offering to have a positive impact on its attractiveness, and
- Supporting the implementation of development and housing projects in line with the expectations of the commitment for the renewal of the mining basin.

Tourism, recreation and the desire for cultural reimaging have been a major focus of redevelopment. In the early 2000s, the Ministry of Culture decided to decentralise major Paris museums to bring more culture as a strategy to support economic development in certain areas, like the Coalfields. The Louvre's first satellite museum was developed in Lens with the explicit purpose of revitalising the economy of the region and opened in 2012. It is built on site of what was once mine no. 9 and is a Public Establishment for Cultural Cooperation.

The Hauts-de-France Regional Council, the EU, the Pas-de-Calais Departmental Council and the Lens-Liévin Urban Community contribute to the museum's funding. The remaining costs are covered by visitor income. In 2023, the museum had 289 384 visitors, 92% French, of whom many live in the area, and 31% of visitors are "regulars" (Louvre Lens, 2025). Entry remains free other than for temporary exhibitions. This is in order to continue to attract the strong local visitor base. The museum is not financially self-sustaining from visitor income or sponsorships alone, with public funding continuing to support its operations.

Other redeveloped mining infrastructures include the slagheaps through:

- 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 more commercially successful is the artificial lake with a nautical base for summer sports (Helfer, 2021).

After Paris, the Nord-Pas de Calais has received the second most investments in culture, with big projects such as the Louvre-Lens. While early investment came from the public sector, tourism businesses are now investing in innovative offerings. These include a guest suite inside a custom-built wagon – a stately former home of a mining engineer has been transformed into a restaurant and guest rooms; and a sustainable agriculture site that has become a tourist attraction. The herd of goat grazes on the slag heap, preserving biodiversity and generating organic milk for cheese, soaps, and other products. An onsite restaurant sells goat cheese and hearty regional specialties with local beer.

Lens's development is necessarily also impacted on by its surrounding region. The near-by town of Lille attracts many of the residents of Lens for work each day. In a similar way that the Mpumalanga Coalfields are well-situated for the flows of goods and people, the Hauts-de-France region is located where major international corridors connect.

Institutional and financing lessons

The region's transition has been supported by institutions and funding over many decades with rounds of planning and investment across all dimensions of the economy, society and environment. Before 2000, many mining sites, building, installations were demolished.

Since 2000, major efforts have focused on regeneration, including the environment and the deliberate use of culture as a driver of investment and anchor for tourism and recreation. Institutionally, Mission Bassin Minier, from 2002, drove coordination of regional planning.

Tourism, recreation and cultural development have been a particular focus in Lens, once a vibrant mining town. Now it offers many visitor experiences including the anchor attraction of the Louvre-Lens. Despite its success and ability to attract visitors, the museum cannot cover its costs through operational income, and the Hauts-de-France Regional Council, the EU, the Pas-de-Calais Departmental Council and the Lens-Liévin Urban Community have and in some instances continue to fund it as an anchor project.

Much of the funding and planning effort was led by the government for many years. More recently, local actors and initiatives have taken off, including in tourism entrepreneurship, but this has been after generations of investments in infrastructure services, environmental improvements and the like. As with the Ruhr, the UNESCO site listing is a source of local pride.

The broader region of the area is also important to the historic coal-mining region. Like the Mpumalanga Coalfields, Nord Pad-de-Calais is situated at the transport and trade crossroads of the region, bringing other economic potential and activity. While unemployment in the area has decreased since 2010, it remains higher than the national average.

Source: Summarised and adapted from Winston-Nicklen, 2022,
Mission Bassin-Minier, 2025; Policarpo and De Souza, 2024; and Helfer, 2021

Case study 4: Ombilin coal mining heritage of Sawahlunto, Indonesia

Sawahlunto is a small-sized post-mining city whose infrastructure was mostly built to serve the needs of the mining industry. The Ombilin coal mining heritage of Sawahlunto dates back to 1882. This industrial site was developed by the Dutch East India Company and had several tunnels, a main site, housing and other staff services, and railway corridors to the port, as well as coal storage facilities in the city of Padang.

In 2000, PT. Bukit Asam Persero, an Indonesian state-owned mining operator, officially shut down its coal exploration, affecting the city and its residents. The city has suffered as an abandoned post-mining landscape with dilapidated mining infrastructure and an exodus of the population.

Mining heritage tourism was identified as an opportunity by local authorities, starting in 2003 when the West Sumatra Provincial Government inventoried its cultural mining heritage properties. In 2005, the Sawahlunto revitalisation project began. Much of the old, dilapidated mining infrastructure was refurbished by local and national government funding. In 2019, UNESCO declared the city a World Heritage Site.

The main site attractors are split into four categories, and together comprises a significant set of visitor experiences linked to events, adventure and entertainment, and heritage sites including museums, tunnels, historic buildings and facilities.

Figure 25: Main site attractions

Natural	Human-made not originally designed, primarily for visitation	Human-made and purpose-built for visitation	Special events
- Cemara observation deck - Blue lake (former open pit)	- Mbah Soero mining tunnel - coal processing plant - mining company office - cultural center building - public kitchen museum - railway museum - labour housing	- mining museum - painting museum - dance museum - musical museum - Kandih resort - fruit garden - water park	- Songket (traditional clothes) carnival - international music festival - multicultural event - mining anniversary

Source: Armis, 2020.

In a study, based on a survey, that assessed the importance and competitiveness of a set of destination attributes in Sawahlunto, four attributes were identified as both highly important and key determinants of the visitor experience. These are cuisine, hospitality, accessibility, and personal safety. Given this, three specific proposals for the post-mining site include:

- Better accessibility including more frequent and convenient car or bus services, safer traffic conditions, and well-maintained road quality.
- Crime prevention and disaster risk mitigation plans to ensure personal safety.
- Integrating mining history and value into culinary businesses to add variation to the destination experience.

A wide variety of shopping products and sports or recreational activities were also identified as having the potential to have a greater impact on destination choice. The study also indicates that successful tourism as a force for local economic development in the city is challenged by low organisational capabilities, inadequate political attention from the national government, and a limited budget.

Local government, communities, and international organisations, have all played a role in the cultural heritage conservation in Sawahlunto. The local government restored historic buildings and developed tourist facilities. The local community remains proud of their mining history, which they see as linked to their identity.

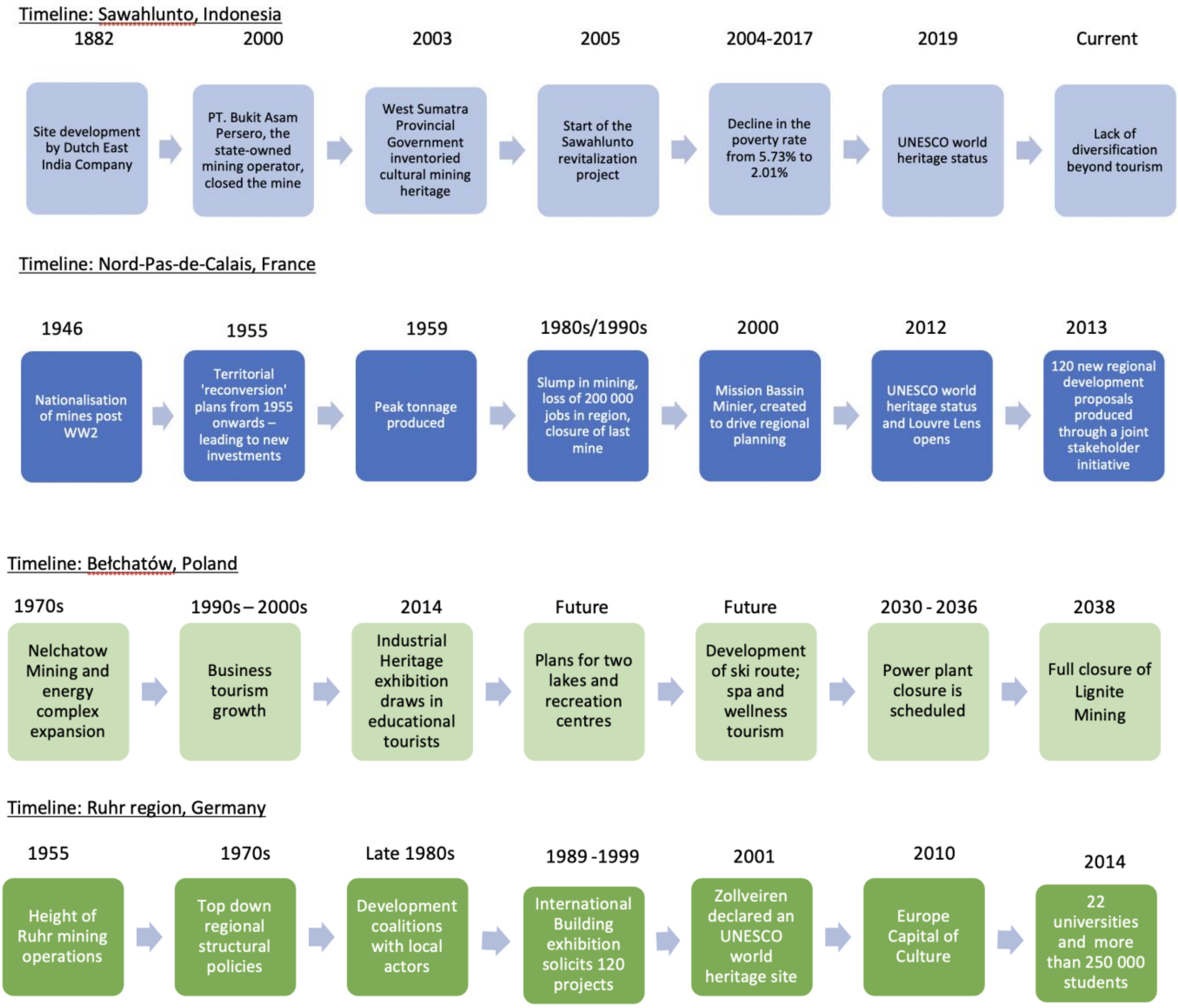
Cultural tourism has created jobs - tour guides, museum managers, or small business owners resulting in a decline in the poverty rate from 5.73% to 2.01% between 2004 and 2017. But there remains an over-reliance on tourism without further economic diversification. More investment is also required in ecological restoration, particularly in mining areas that are not fully reclaimed. Some water contamination still exists (Fajri et al.,2024).

Institutional and financing lessons

A lack of funding has been identified as a major constraint to tourism development. It has also impacted on the extent of restoration that has taken place and limits market access for, amongst others, cultural industry workers. There is limited financial support from central or national government and international agencies. Most funding coming from local government. There is also an over-reliance on tourism as an economic sector and job-creator, which creates its own vulnerabilities.

Source: Summarised and adapted from Armis, 2000
and Fajri et al, 2024

Figure 26: Timelines for the four post-mining case studies



3.5 Agritourism

Agriculture is a major part of the Mpumalanga economy including in the Coalfields region. Mpumalanga is one of South Africa's most productive agricultural regions because of its wide climatic variation which allows for the production of various crops, including for export. More than half of the country's soya beans are produced in Mpumalanga's Highveld areas – including the Coalfields region. Natural grazing covers about 14% of the province and the province is the fourth biggest seller of cattle in South Africa as well as having a sizeable poultry industry. However, land is severely degraded as a result of poor soil management and mining activities. This affects the province's land and water resources as well as the associated value chain activities (Mpumalanga Green Cluster Agency, 2023).

Agriculture and agro-processing have been identified as key sectors from the Mpumalanga economic reconstruction and recovery plan. Industrial hemp, niche products and energy crops are identified as growth opportunities (Mpumalanga Green Cluster Agency, 2023).

Agritourism already exists in the Coalfields area, with a few farm homestays, certain farm-linked activities and the largest tractor museum in Africa (Randall's Ranch Museum, outside of Lothair). None of the agritourism destinations are particularly well-known destinations although the Govan Mbeki

2020/21 Integrated Development Plan motivates for the re-establishment of the Bethal Potato Festival (Govan Mbeki Municipality, 2020)

While the Western Cape is well-known for its wine routes, the rest of the country has less developed agritourism experiences, although ostrich farms feature prominently in certain areas. Tripadvisor lists the following agritourism farms in South Africa as the most popular (a function of the number of reviews and scores):

- Boschendal (Franschhoek Western Cape) – historic estate, winery and vineyards, organic farms, various activities and accommodation, Friday night markets, etc.
- Highgate Ostrich show farm (Oudtshoorn, Western Cape) – ostrich activities.
- Safari Ostrich Farm (Oudtshoorn, Western Cape) – Ostrich tractor tours.
- Redberry Farm (George, Western Cape) – hedge maze, picnic experience.
- Irene Farm (Centurion, Gauteng) – urban farm experience.
- Wilgewandel holiday farm (Oudtshoorn, Western Cape).
- Flag Animal farm (Durban, KwaZulu-Natal) – more than a 100 rescued animals.
- Oranjezicht city farm market (Cape Town, Western Cape) – urban farm market

Source: TripAdvisor, 2025

A 2014 audit of agritourism across the country identified 386 accommodation establishments in South Africa offering agritourism-linked activities. Thirty-five of these were in Mpumalanga with Dullstroom the most significant destination, with seven accommodation establishments and activities such as trout fishing, horse riding and cattle farming. Other Mpumalanga towns also featuring were Wakkerstroom (identified as having four to five farmstays), Belfast, Chrissiesmeer, Hazyview, Nelspruit, Piet Retief and White River each with two to three. Belfast and Chrissiesmeer fall within the Coalfields region (Rogerson and Rogerson, 2014).

A global literature review of agritourism critical success factors identifies the following elements as key: *customer service* (focus on the customer, customer loyalty, customer satisfaction, customer needs, quality customer service), *financial planning* (financial planning, resource management, business analysis), *marketing* (target market, promotion, technology, promotion, brand identity), and *location* (proximity to amenities, towns/cities, local tourist attractions) (Van Zyl, 2022).

Agritourism case study: Stellenbosch Wine Tourism

The Cape Winelands is less than a two-hour drive from Cape Town – and benefits from the proximity of the substantial population and visitor numbers to the city. The wine region has abundant attractive landscapes and heritage sites in addition to many wine farms and other visitor attractions. Many wine estates have won awards for their wines. Some have been bought by well-known wealthy businesspeople who enjoy the prestige associated with owning wine estates.

The first three wine estates to open to the public were Simonsig, Delheim and Spier in 1971. Stellenbosch Wine Routes launched in 1973 with 11 members. Within 20 years the membership grew to 50 estates and is now more than 150. More than one million visitors annually visit the routes, supported by Stellenbosch Wine Routes, a membership based industry association which supports their marketing.

Over the past decade, certain estates have invested heavily in experiences – particularly Delaire Graff, Spier, Asara, Boschendal, Zorgvliet, De Zalze and Cavalli. These estates offer a kind of wine "resort" where their wineries are complemented by luxury hotels, multiple restaurants, art and the like. Food tourism – or culinary tourism – is increasingly a drawcard. This kind of experiential tourism is growing around the world.

Key success factors for wine tourism include the quality and number of wineries (together creating a critical mass), a region's physiographical appeal, and how the products of cultural tourism support the region's tourism appeal.

Funding and institutional lessons

Initially driven by private sector entrepreneurs from the 1970s, with its success over time, government support and/or mandated local tourism organisations now support the routes. They also bring developmental elements into the routes, to ensure greater inclusivity and broader access and benefits.

Certain farms are supported by wealthy owners, who enjoy the prestige associated with the success of the wine farms and for whom investment amounts and commercial success are not restrictive factors in their experimentation.

Source: Summarised and adapted from Lacea, 2020

3.6 Conclusion: Key takeaways

Timelines and co-evolution

The case studies demonstrate that tourism and mining have a linked pathway. While leisure tourism may be in place before mining, once mining developments begin, tourism firms will instead respond to the needs of construction and development workers for housing, food services, transport and recreation. During operations, tourism firms may fulfil the temporary housing needs of workers and businesses working with mines and the demand for recreational amenities for workers. Business tourism often emerges as meetings and conferences are required by the mining industry and other industries servicing the mining industry. Some education tourism might also exist, as industrial or study tours. However, in mining regions, the potential of nature-based leisure tourism may well be limited by the existence of mining with its polluting characteristics. There is, accordingly, a co-evolution of certain kinds of tourism with mining. For this reason, when mining declines, existing forms of tourism might decline with it, while other types of tourist experiences and markets might emerge.

Post-mining, the emergence of a new tourism destination and cluster may take some time. The case studies indicate a few decades between early investments and a well-established destination. While initial tourist numbers were high in the case of the Louvre-Lens, broader networks of experiences and entrepreneurs, as well as the establishment of marketing and brands, have taken longer. This example nonetheless indicates that anchor attractions can help drive momentum around tourism destination development. This "anchor attraction effect", which may be in and of itself a financial loss leader, is likely what has motivated large public investments in repurposing mine facilities into dams, ski slopes, and cultural venues. The location of such a lead or anchor attraction could also be subject to some contestation between competing areas, and this needs a broader regional development vision to be established.

The wine route in Stellenbosch took a different, more incremental form, with a relatively slow and steady growth over time in members and the 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, who often made their money in other industries and are motivated by the creativity, accolades and prestige associated with their wine estates, i.e. they are not motivated by only commercial success.

Culture, heritage and community

Industrial heritage attractions in Europe are typically financed, at least in their first phase, by major public funds, which also address environmental and infrastructural needs (in many cases before cultural heritage and tourism development). Tourism falls into a broader cultural and heritage programme seeking to recognise the heritage of the areas.

The cultural heritage aspect is important, and museums, exhibitions and so on are part of honouring the legacy of the spaces, which is often complicated and may be contested. Recognition of the community and cultural significance of mining has been a major motivator of the development of the sites. Ex-miners are often employed when mine tours are offered to share their experiences.

Museums may not be operationally profitable, particularly where they rely on local visitors, which is critical for inclusion and relevance, but these local markets do not spend as much as tourists do, who bringing their "tourist" dollars with them when they stay overnight in the area.

Experience development and tourism as part and parcel of a long-term rehabilitation and re-investment effort

The different landscape features within these major mining areas are extensive and include, 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 and characteristic urban" (Policarpo and De 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, etc. – sits at the heart of the re-invention of sites. Creating a wow factor can play an important role: adventure and activity-based tourism stand out as niches that transform static sites into ones of adrenaline and experience. This is also true for the leading wine farms, where award-winning gardens, music concerts, culinary experiences set them apart.

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 the heritage elements were important, enabling or supporting aspects such as safety and security, accessibility and cuisine offerings were seen as strong determinants of destination success. Food has also emerged as an important drawcard in the wine routes of Stellenbosch. In France, innovations around the mine dumps have created interest from media, driving visitor interest.

Institutions and partnerships

In South Africa, the mine tourism examples of Cullinan (in Dinokeng), Kimberley's Big Hole and Pilgrim's Rest indicate the importance of functional long-term partnerships between the government, private sector and other stakeholders in driving tourism development – and continuing to secure it. In the case of Gold Reef City and Kimberley's Big Hole, large corporates (and in the case of Kimberley, the historic mining company) have played a major role in financing tourism developments. Pilgrim's Rest and Barberton have multiple SME tourism and other businesses underpinning their tourism offerings. In Pilgrim's Rest the lack of security has resulted in the site being closed to tourists with significant consequences for local businesses and tourism branding.

In Europe, tourism is seldom the only focus of economic diversification efforts, although in Indonesia it has been the major focus at Sawahlunto, resulting in economic vulnerabilities (such as in the case of

COVID impacts). The European examples, typically include multiple new land uses with multiparty development plans, including co-located universities. Tourism is a good fit with landscape restoration – such as remediation of waterways and parks, new biodiversity projects – as recreational use of these features can ensure they are both supported and that income streams and business opportunities are created. Adequate funds – and these can be significant amounts and not always adequately covered by the mining house legal obligations towards remediation – are needed to substantively rehabilitate the natural environment.

In France and Germany, at Nord-Pas-de-Calais and Escher Park, both examples of successful post-mining development, the development processes have evolved in different phases. In both cases, "bottom-up" innovative proposals have ultimately formed part of the development process, encouraging different stakeholders to imagine what might be possible for site uses and to put in proposals. Broad stakeholder pacts or development coalitions have helped to drive the vision and create accountability between parties. Earlier investment in infrastructure and environmental remediation helped pave the way. It is clear from all the case studies that strong collaboration and capable institutions are needed to set an acceptable regional development vision and support private sector innovation within it.

Markets and collaborative marketing

Agritourism is relatively under-marketed and poorly organised in South Africa other than the wine and ostrich tourism of the Western Cape. Dullstroom is one area with a strong agritourism offering in Mpumalanga, and Belfast and Wakkerstroom in the broader Coalfields are also identified as having accommodation on farms with experiences. Neither of these Coalfield towns has notable agritourism attractions, however, and their offering and/or the marketing thereof is not sufficient to attract tourists to the region.

Agritourism experiences are typically far smaller in scale and ambition than major post-mining site developments. Success relies on enough co-located experiences to create a regional brand and offering that pulls in tourists. Of possible relevance to future Coalfields tourism is that certain kinds of sustainable agritourism can support landscape management, and remediation, which can create interest and unique experiences for tourists, such as example of goats grazing in Lens, France and the vineyards on the slagheap.

A number of the global studies of industrial tourism indicate the importance of tourist site 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 one study on Finland, this point is implied, where it is noted that more investments in recreation, cultural and commercial infrastructure occurred at mine sites in or close to cities and villages than at remote sites. In Indonesia, in the Sawahlunto study, accessibility was highlighted as a critical factor in supporting tourism development. At the Big Hole in Kimberley, the diamond tourism experience is not sufficient to attract mainstream tourism at scale given its distance from large population centres and other tourism sites.

As many of the post-mining destinations in Western Europe have large nearby populations with the propensity, tradition and means to travel for tourism and recreation, the commercial success of tourism experiences at post-mining sites is more likely. Cultural tourism is also a major motivator of travel in Europe, while this is not the case in South Africa. Nonetheless, even with the Louvre-Lens brand and support, the museum is not fully commercially viable. It is estimated that cultural tourism accounts for 40% of all European tourism with four out of 10 tourists choosing their destination based on its cultural offering (CBI, 2021). In South Africa, domestic tourists are more interested in "beaches and coastline", "nature", "wildlife", "city life and entertainment", "adventure and outdoor activities", than "cultural/ historical experiences" (South African Tourism, 2025). Only 13% indicated visiting historic sites as a preferred reason to travel.

The need to match tourism experiences to market demand is critical. Adventure, activities, and food may be stronger drawcards than heritage tourism sites only offering museum experiences. Differentiation is key in tourism attractions; convenience and safety is also important, in addition to compelling and well-executed experiences. These factors emerged from the research in Sawahlunto, Indonesia, and the literature on agritourism, and have broad application, including to South Africa, where "hygiene factors" such as safety and security, health infrastructure, quality of roads, water and electricity are often cited as the weakest destination attributes.

Table 6: Lessons from the literature and case studies

AGRITOURISM/ RURAL TOURISM ROUTES/ CLUSTERS
• Initial group of entrepreneurs willing to work together to market a destination and fund early efforts around collaborative marketing, events, etc. • A critical scale and market awareness can attract additional entrepreneurs and create further momentum • Different experiences are key – accommodation is not the drawcard, rather activities, crafts/local retail, food and beverages, wellness, etc. Cultural heritage – buildings, history, etc – also important • Innovative experiences can build interest and brand, capture tourists' imagination. • Government can support through additional marketing, inclusivity including training programmes, infrastructure development and enhancements (roads, signage) • Domestic markets are critical to drive year-round visitation and income. • Tourist income come support diverse income streams for farms. • Co-location in a region is important for connected offerings, and ease of visitation.
POST-MINING TOURISM
• Strong initial role of public sector in driving regional development planning; then regional planning bodies comprising all stakeholder groups and ideation from various stakeholders. • Provision of public finance for rehabilitation of sites. • Establishing a post-mining tourism destination takes time and can be supported by anchor or catalytic investments in major attractions. • Environmental remediation is critical, and without this the tourism experience can be compromised. • Tourism sites can be part of a regional development plan and benefit from broader economic diversification. Tourism alone cannot revive a region. • Tourism experiences are often linked to major cultural developments to celebrate the heritage of the area. • Tourism innovation from entrepreneurs happens after initial development phases, building off the base of a core attraction and marketing. • Multiple attractions and experiences are necessary to attract diverse markets. • Nature based activities and experiences have broad appeal – including adventure and sports-based facilities, such as lakes, ski slopes, and mountain biking. • Tour guides are typically ex-mine workers who can explain the heritage of mine site. • Families, students, educational tourism is a major driver of visitation too. • Proximity to markets is important to benefit from visitor flows. • Safety and security, accessibility are critical for destination success.

4. PRIMARY RESEARCH FINDINGS

4.1 Introduction

Purpose and approach

This section provides insights from primary research into the tourism characteristics of Mpumalanga, with a particular focus on the Coalfields. While not statistically significant, the data conveys a granular sense of tourism performance trends at the firm-level – including the market, barriers and growth opportunities – as well as broader tourism and sustainability views and actions among tourism operators.

The source of these insights is:

- Data from an online survey, which highlights tourism and sustainability actions and views from select tourism firms operating in Mpumalanga.
- Expert interviews with non-accommodation establishments – tour operators, chambers of commerce and other non-tourism stakeholders – and seven semi-structured interviews with accommodation establishments[5].

The online survey findings, reflected in Subsection 4.2. and Subsection 4.3, contains the consolidated views of accommodation establishments and other experts who were interviewed between October 2024 and February 2025.

4.2 Online survey findings

An online Sustainability Dipstick survey was designed to identify the actions, perceptions, and concerns regarding sustainable tourism held by members of SATSA. The survey link was live between 17 November and 17 January 2025 and was designed in and hosted by SurveyMonkey. Most of the questions provided drop-down lists of potential answers. A few questions allowed for open responses.

SATSA distributed the survey link to all its members in the association on 17 November, with a reminder sent one month later, and then a final reminder in mid-January, whereafter access to the online survey was removed. Emails were sent to all SATSA members, approximately 1300 members in total across the country (although this includes, in a few instances, different regional offices for the same company). A total of 123 responses were received, and these were filtered for enterprises that operate in Mpumalanga, yielding a Mpumalanga sample of 58 (Rivett-Carnac, 2025).

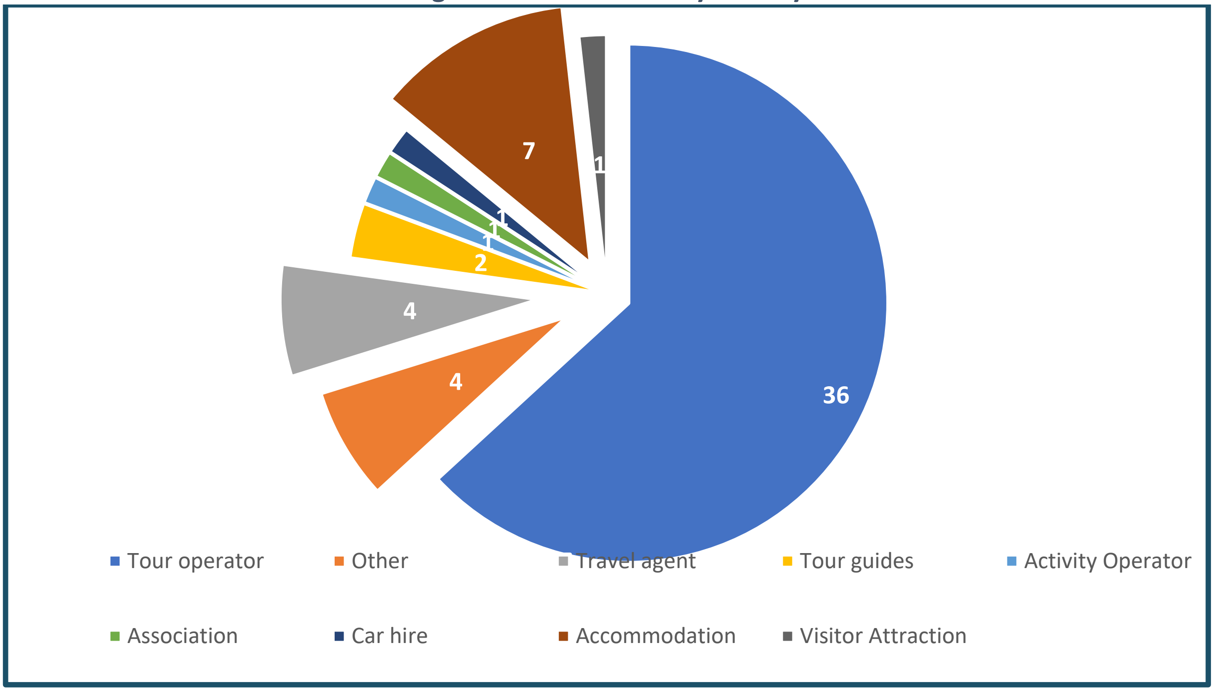
Mpumalanga respondents

Of the 58 enterprises operating in Mpumalanga, nearly all operate in the Kruger National Park, and most also operate on the Panorama route. Only 10 of the 58 indicated they operate in Emalahleni or Middelburg.

The 58 firms operating in Mpumalanga are mainly tour operators, who organise, sell and deliver tourism packages to guests. Usually tour operators put together the whole tour package, although some might offer a more limited service (accommodation only, for example). Many tour operators will work with ground handlers who provide the transport to tour groups in coaches, or to smaller groups, in a 15 seater vehicle or smaller. Eight of the respondents operate accommodation establishments.

[5] Due to the emphasis on paid accommodation, VFR tourism where tourists stay with family and friends is not well represented.

Figure 27: Main industry activity



Source: Rivett-Carnac, 2025 – SATSA Dipstick Sustainability Survey, 2025.

More than three-quarters of the Mpumalanga respondents work with long-haul tourists, who are on holiday. Very few work with domestic tourists, or regional tourists.

Figure 28: Tourist source markets of travel

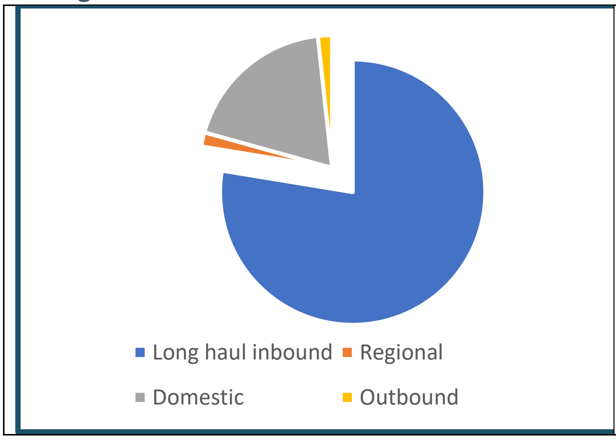
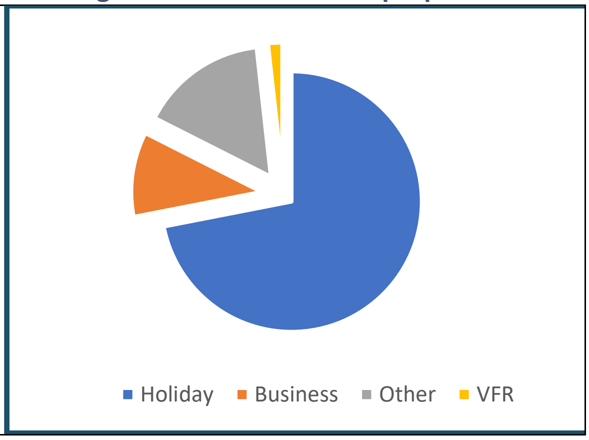


Figure 29: Tourists' main purpose



Source: Rivett-Carnac, 2025 – SATSA Dipstick Sustainability Survey, 2025.

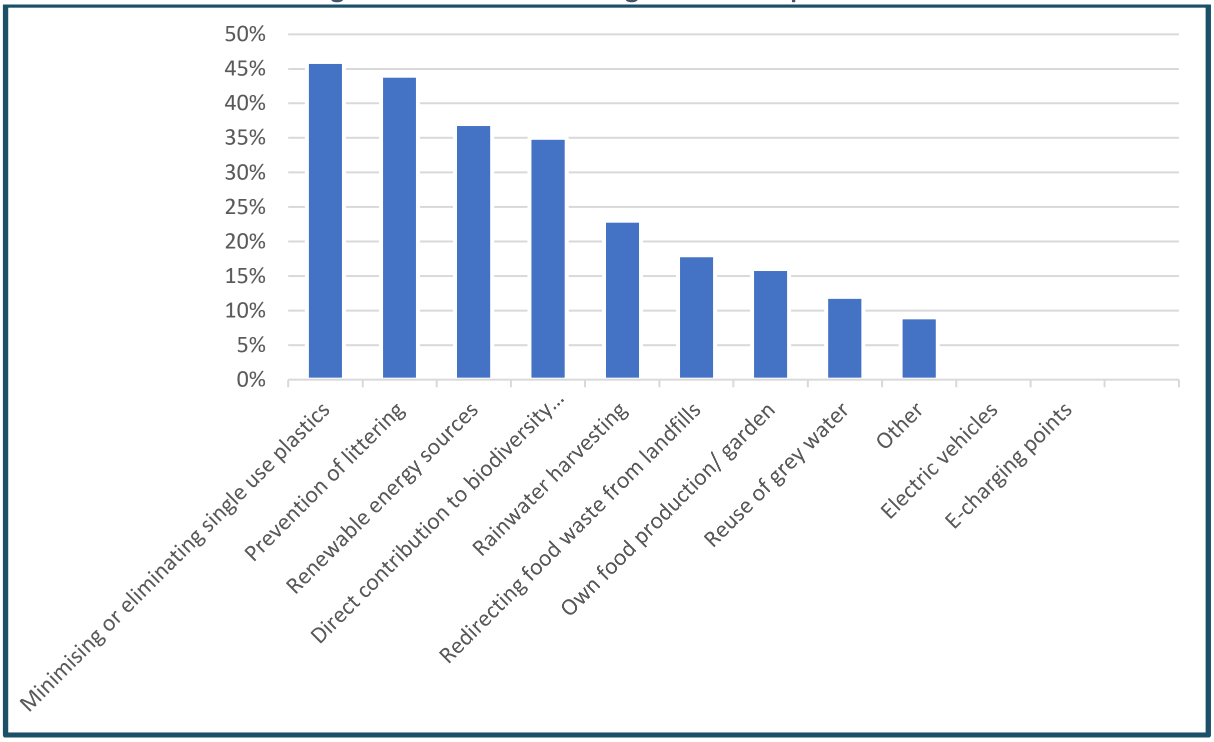
For those respondents who operate in Middelburg and Emalahleni, business tourism and educational tourism are the more prominent purposes of client travel. This aligns with the insights from the semi-structured accommodation interviews in Section 4.3.s]

Most Mpumalanga respondents (39 of 58) have less than 10 employees, and have a turnover of R20 million or less (40 of 58). This confirms other research which indicates the proliferation of SMEs in the tourism sector.

Climate change is a concern to 41 of the 58 firms, with 20 "very worried about it", and 21, "somewhat worried"; 13 are "not worried", and three chose "other", which included being uncertain.

In terms of green technology used in operations, waste reduction actions are the most common, followed by renewable energy sources, contributions to biodiversity conservation, and rainwater harvesting, in that order. Given that most firms are tour operators, renewable energy use might refer to energy sources at head offices. It does not refer to "ground handlers" use of new energy vehicles: electric vehicles and charging points are not currently in use by the industry (see Figure 30), although Pilgrim's Rest has recently installed a charging station for electric vehicles.

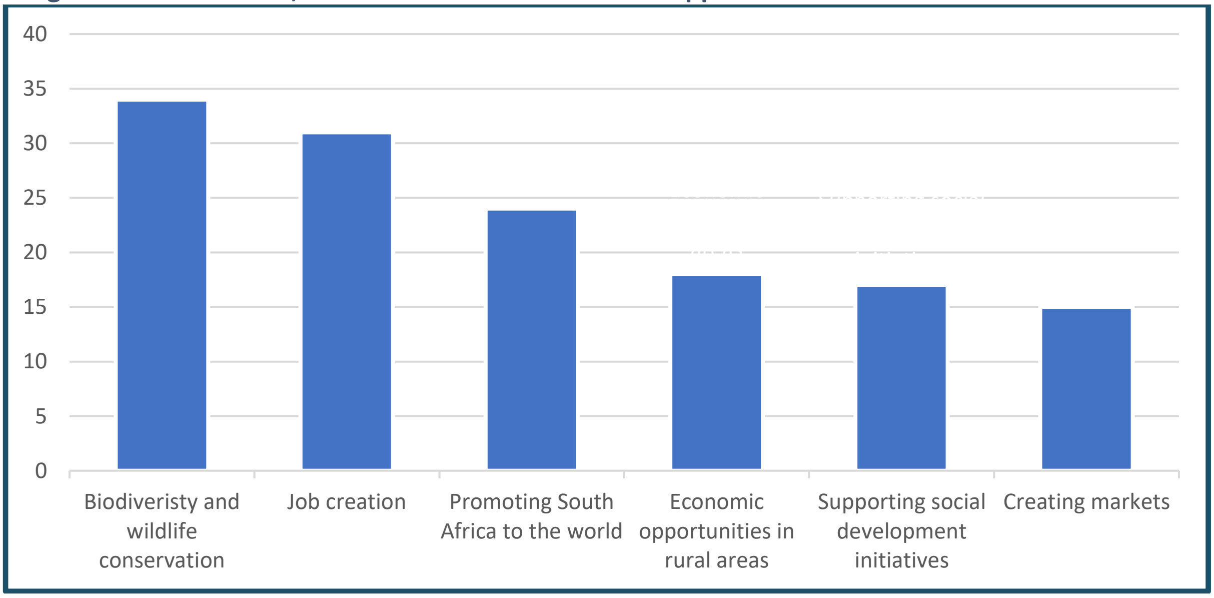
Figure 30: Green technologies used in operations



Source: Rivett-Carnac, 2025 – SATSA Dipstick Sustainability Survey, 2025.

The main social, environmental and economic opportunities from tourism identified by firms are "biodiversity and wildlife conservation"; "job creation"; and "promoting South Africa to the world". "Economic opportunities in rural areas", "supporting social development initiatives", and "creating markets", are also important opportunities, according to the respondents.

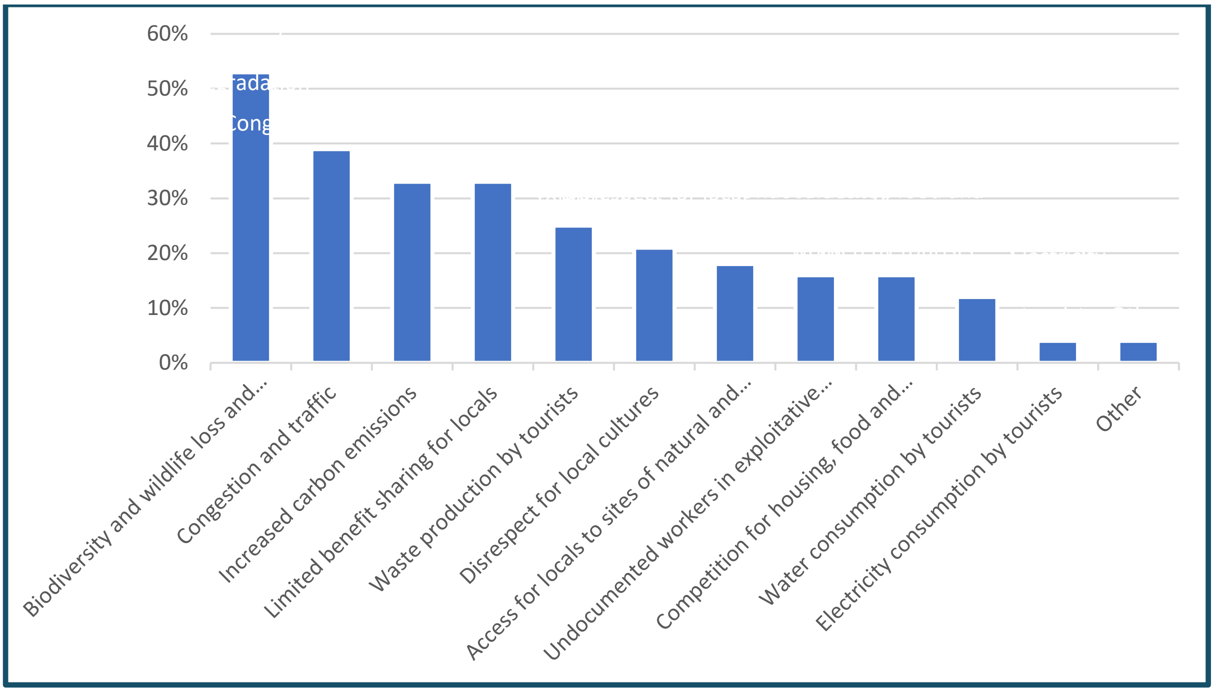
Figure 31: Main social, environmental and economic opportunities in South Africa from tourism



Source: Rivett-Carnac, 2025 – SATSA Dipstick Sustainability Survey, 2025.

The main risks from tourism were identified as "biodiversity and wildlife loss", "congestion and traffic", "increased carbon emissions", "limited benefit sharing for locals", and "waste production by tourists”, in that order. “Undocumented workers in exploitative work” was also identified as a top three risk by 16% of respondents. From a justice perspective, any tourism developments in the Coalfields must ensure that “Limited benefit sharing for locals” and “undocumented workers in exploitative work” are addressed as two critical issues.

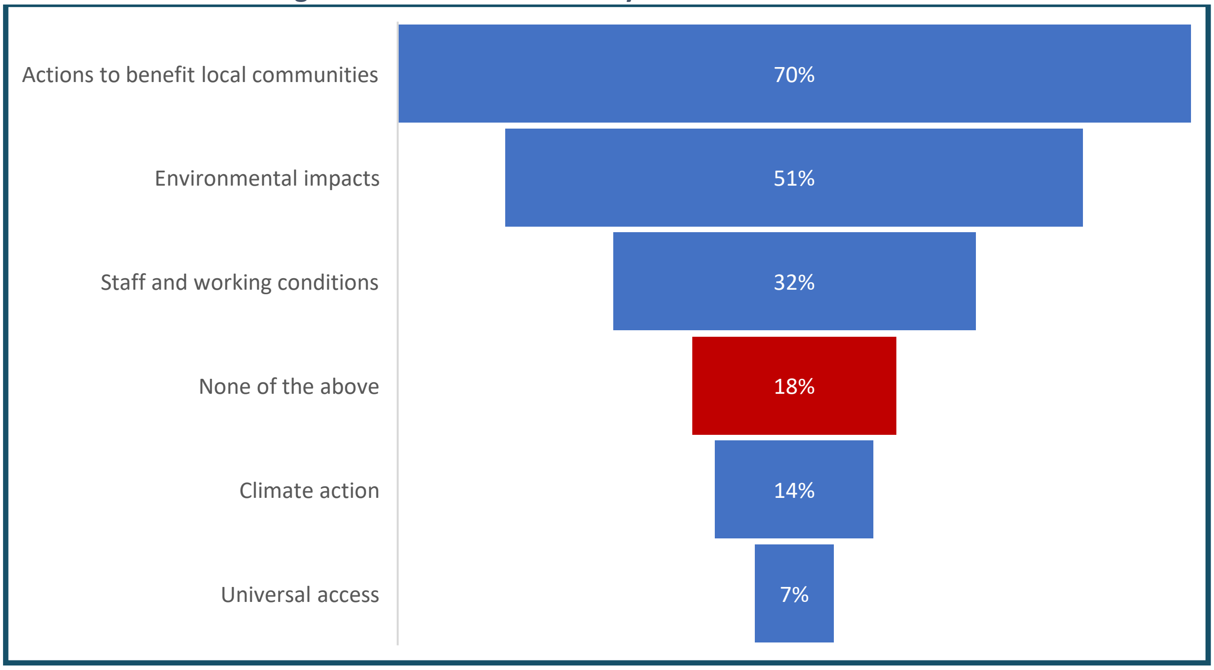
Figure 32: Main social, environmental and economic risks in South Africa from tourism



Source: Rivett-Carnac, 2025 – SATSA Dipstick Sustainability Survey, 2025.

Seventy percent of respondent firms indicated that tourists ask sustainability questions relating to “actions to benefit local communities”. The next most common question was on the “environmental impacts of the firm’s operations”, at 51%. “Staff and working conditions” was third.

Figure 33: What sustainability issues tourists ask about

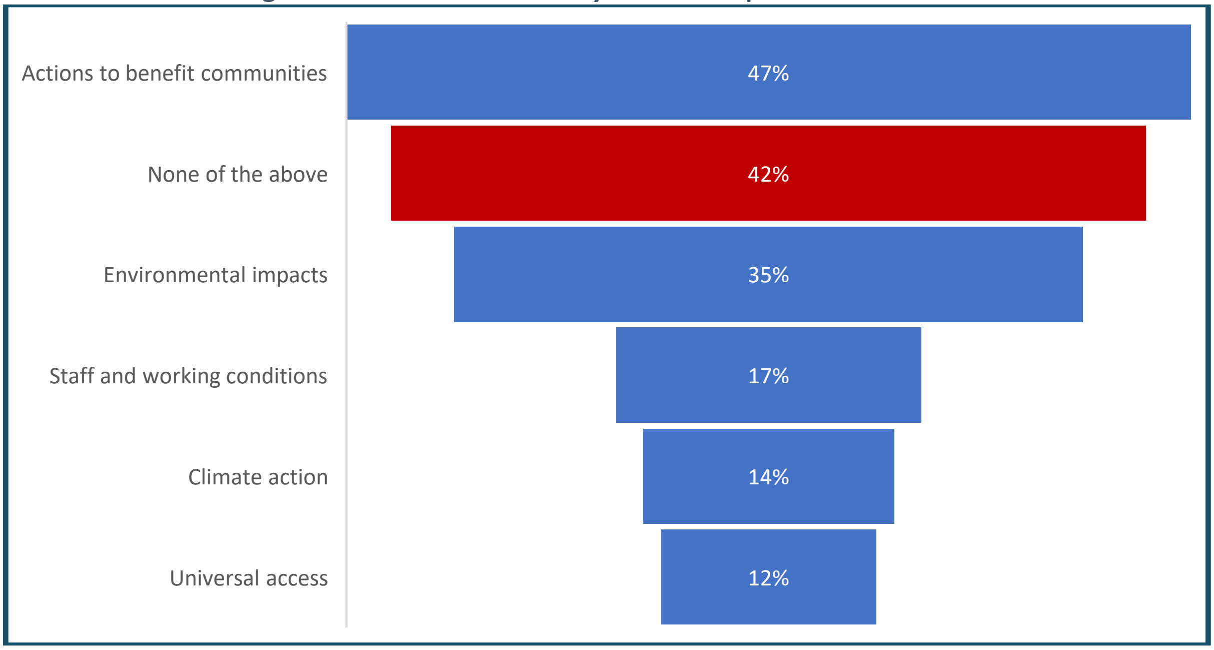


Source: Rivett-Carnac, 2025 – SATSA Dipstick Sustainability Survey, 2025.

Business to Business (B2B) partners, the intermediary buyers of tourism, are less likely to ask questions about the sustainability actions taken by their supply chain partner (the SATSA survey respondent) than are tourists: 47% of the respondents indicated that their B2B partners ask about '"actions to benefit communities", while 42% indicated that their B2B partners do not ask about any of the major sustainability impact areas.

Given the interest of most tourists, and more than half of the intermediaries, economic diversification initiatives in tourism should communicate sustainability actions to their clients.

Figure 34: What sustainability issues B2B partners ask about



Source: Rivett-Carnac, 2025 – SATSA Dipstick Sustainability Survey, 2025.

When asked about other issues that keep them awake at night, the responses of SATSA members operating in Mpumalanga included:

- The need for more awareness and education on sustainability, and advice on certification.
- Concerns with government inaction or inefficiency, including poor wildlife conservation.
- Crime, and safety and security concerns.

4.3 Accommodation and other expert interviews

A semi-structured interview questionnaire was used to guide discussions with respondents. It covered the areas identified in the assessment tools for tourism potential introduced in Section 1. Low-carbon, green and inclusivity initiatives were also discussed.

Interviews took place online and in person during a road trip in February 2025.

Non-accommodation experts include representatives of organisations working in Mpumalanga, but not exclusively in the Coalfields, including an organisation working with communities and wildlife crime, the owner/operator of a major tourism attraction on the Panorama route, tour operators to Kruger National Park, two Chamber of Commerce executives (from different chambers), and a WWF representative working on the Just SA consortium (to explore possible linkages with water remediation).

Accommodation interviews were held across the Coalfields and comprised three hotels, three guesthouses and one private nature reserve. The location of the establishments interviewed is shown in Figure 35.

Figure 35: Location of interviewed accommodation establishments

Source: Author, based on AfriGIS (Pty) Ltd, 2025.

Natural endowments

Natural endowments include protected areas and natural sites of significance, as well as cultural sites of significance. "Industrial depth and diversity" could be considered an endowment for tourism. This is considered under the section on agglomeration factors later in this section.

Many towns in the Coalfields have cultural heritage sites, but these are seldom maintained, developed or marketed to the public. For example, there are nine listed heritage sites in and around Emalahleni (according to the Integrated Development Plan), but none of the tourism stakeholders mentioned the sites as attractions in the area. The sites include bridges, farmsteads, concentration camps, archaeological assets, military graves and rock shelters. Furthermore, in Emalahleni town, over time, many of the heritage buildings have been demolished and redeveloped, with little built heritage remaining.

Emalahleni or Witbank Dam is an important site for recreation and tourism, with boating and fishing. Several small-scale lodges exist in the area with direct access to the dam, however, accessibility to these lodges varies, as does the quality of their offerings. There is no joined-up dam experience for tourists or visitors to the area, or major facility offering activities such as kayak rental, boat rental, fishing trips, and boat cruises.

Adjacent to the dam, the Emalahleni Nature Reserve can only be visited if permits are obtained in advance (i.e., visitors cannot arrive at the gate and enter the nature reserve). It is not a fully operational tourist site despite being a significant conservation area. In 2010, it was enlarged to cover an area of about 1600 ha of land.

Officials at the tourist office in Middelburg and front-of-house staff at accommodation establishments indicate that there are few visitor experiences in the area. Botshabelo was at one point a significant cultural heritage site, including as a stop for coach tours. Both this site and Little Elephant – a successful craft outlet – are no longer operational. In the case of the former, this is the result of longstanding contestation between different community factions within a group of successful land claimants.

A large concentration of irreplaceable Critical Biodiversity Areas exists to the northeast of the town. One of the protected areas was previously open to public accommodation bookings, but now has a longer-term lessee, Wild Ride Horse Safaris, which offers horse safaris on a long duration (a minimum of two weeks at a time).

Twenty kilometres west of Middelburg, Corn & Cob is a popular stop with the tour bus market. Landscaped gardens, conferencing and events facilities, a recreated Ndebele village, with arts and crafts for sale, and a restaurant providing a buffet lunch, provide a short, interactive stop for foreign tourist groups travelling to Kruger National Park.

Ermelo and Bethal have several heritage-linked sites connected to the South African War and the Anti-Apartheid liberation movement. The Nomoya Masilela museum in Bethal provides exhibits and information on the area, its history, geology and important people in the liberation struggle. Currently, the main visitor market at the museum is students. The area around the museum in Bethal town is dilapidated. Ermelo heritage sites are not well-preserved and little visitor experience, or visible marketing of these, exists.

Chrissiesmeer, 30 kilometres north of Ermelo, has a unique protected environment of pans, offering experiences linked to birds, grasses, frogs, and a special ecosystem of connected wetlands and lakes. While the lakes are attractive features of the landscape, they are not easy to access, as they are all on private property. Chrissiesmeer also has heritage appeal, as a one-time trading post, with one of the first houses built as far back as 1880.

Source: Author, February 2025.

Figure 36: John Jack Inn, Chrissiesmeer

Source: Author, February 2025.

Secunda provides several leisure facilities, mainly for staff of Sasol. Leisure facilities include the Lake Umuzi waterfront and Graceland Hotel, Casino and Country Club.

Tourism specific infrastructure or superstructure

This includes accommodation establishments, visitor attractions and activities, restaurants, sports, recreational facilities and amenities, events and event facilities, tourist retail (crafts, merchandise).

Based on the Googlemaps image that follows, accommodation clusters exist in and around Emalahleni, Middelburg, Secunda and Ermelo.

Figure 37: Accommodation clusters in the Coalfields

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

This was confirmed using a booking.com datascraper (Apify), which allowed for the total number of establishments to be identified by location. This should, however, not be considered comprehensive snor definitive as the definitions of accommodation category, and delineations of the towns for booking purposes, are not perfect 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 7: Accommodation supply, Coalfields, November 2024

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

Source: Apify Booking.com scraper, November 2024. *Note:* *author's view.

Accommodation in the Coalfields largely caters to business tourism markets, but there are also some farm-based and guesthouse accommodation offering leisure tourism experiences. The accommodation catering to leisure tourists or a combination of business and leisure tourists is typically located around the dams and in the East around Ermelo and the lakes of Chrissiesmeer, where heritage homes have also been turned into bed and breakfast accommodation and guesthouses. Certain of these farms also offer experiences on the farm, such as bird watching, running, wedding venues, and similar.

Most of the accommodation is guesthouses, particularly outside of the major business towns of Emalahleni and Secunda where a few branded hotels operate. Notable branded hotels include Anew hotels with two properties in Emalahleni, and Peermont Graceland Hotel at Secunda. The budget hotel group Khayalami has properties across the Coalfields – in Secunda, Standerton, Ermelo, and Emalahleni. Smaller independent hotels also exist, as do large guesthouses. A (reputedly) 5-star hotel has been developed in Middelburg but is not yet operational.

The Olifants River Lodge, now managed by Dream Resorts, and located north of Middelburg, is the largest conferencing destination in the Coalfields, with venues that can take up to 500 people and accommodation that can sleep up to 300.

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. Very few high-end or unusual "food experiences" exist in the region. It was suggested that residents prefer more traditional offerings to fine dining or unusual food experiences.

For attractions and activities, Ermelo and Chrissiesmeer have a leisure tourism offering, including for the wedding market, with four farms offering wedding venues. This benefits accommodation in the area. Ermelo also has a park run on a farm; and at Chrissiesmeer, small-scale events throughout the year celebrate different aspects of the biodiversity, such as the frogs, herons, flamingos and wild flowers.

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.

Randell's Ranch museum is the largest museum of tractors in Africa, and is located 50 kilometres 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. This is slightly beyond the study focus area.

No interviews were conducted with Loskop Dam to the north of the Coalfields, where several eco- and adventure tourism offerings already exist. As indicated in Section 2, the dam and its surrounding nature reserves are the subject of an ambitious partnership agreement between MTPA and the Aspinall Foundation that hopes to restock big game and create an extensive protected area in the area.

Interviews were also not conducted with lodges outside of Belfast en route to Dullstroom, where there are more leisure offerings on farms, focusing on accommodation, nature, fishing and other outdoor pursuits. Dullstroom and surrounds is a strong cluster for leisure tourism, particularly weekend domestic tourism from Gauteng.

Destination characteristics, capabilities and reputation

This includes considerations like safety and security; destination management capabilities and leadership; social, political and cultural capital; ecological quality (pollution); and traffic and congestion.

Most respondents indicated that safety and security concerns are not a barrier, or not more than elsewhere in the country. In the East, in Ermelo and Chrissiesmeer, respondents indicated there is little crime with only occasional small-scale theft. Illegal mining is however a significant challenge that brings safety and security risks to the region as a whole. One establishment indicated it has had to increase security on site due to illegal mining and miners in the vicinity of their operations.

A further mining-related challenge is competition for land between tourism and mining. There are instances where nature reserves and other businesses in more rural parts of the Coalfields have taken legal steps to stop mining applications close to their properties, which would negatively impact tourism potential. Media articles on coal mining and tourism in South Africa confirm this tension and highlight the risks that ongoing and new coal mining presents to tourism, particularly nature-based tourism assets in Mpumalanga and Limpopo. Mining and tourism can be competing economic activities and mining's impact on the environment has a negative impact on tourism potential (Centre for Environmental Rights, 2024).

Few respondents actively partner with local or provincial government's tourism departments or entities, but most indicated they are invited to occasional meetings. Private-sector tourism associations exist in certain towns where the industry is trying to progress an agenda for development. The small Chrissiesmeer tourism community actively works to develop its tourism offering, and a new ecotourism association is being formally constituted by several businesses in the area. Chrissiesmeer cannot be expanded much further than its small current geographic footprint, but there is potential for more agritourism on surrounding farms. Currently, the land around the lakes and wetlands is privately held by farmers, and while these farmers appear willing to work with the tourism community, access to their lands and management of visitors on their lands will remain important considerations to them.

In Middelburg, tourism falls within the Chamber and is supported in its activities.

While there are tourism entrepreneurs and creatives who wish to invest in the sector and collaborate with others, this is costly in terms of time, energy, and resources. There are also real barriers to innovation: one agritourism entrepreneur in Ermelo expressed frustration that they pay double rates to the municipality – for their agriculture business and their tourism operations – which affects their finances.

Water pollution from mining is a challenge in the Coalfields. Chrissiesmeer is a protected area, and its lakes remain unpolluted at present, but there have been instances of serious water contamination in the Olifants river outside Middelburg and Emalahleni. The Mine Closure Risk Ratings and a Post-closure Opportunity Framework for South Africa (Cole, et al., 2024) indicate that the main rivers around Emalahleni flow into the Olifants River, which feeds more than 30 major dams, 30 minor dams, and up to 4000 small private farm dams and services many irrigation schemes, including Loskop. Polluted water in streams affected by abandoned mines has destroyed species in these rivers and dams, and underground water is polluted due to acid mine drainage. Despite a shared mining water reclamation plant, water resources are, in general, degraded. A recent study of the Witbank Dam catchment area indicates that 85% of polluted runoff generated in the catchment ends up in the river system and the limited ability of the natural systems (through wetlands) to clean this water has been linked to high levels of pollution in the Limpopo River resulting in the death of fish, crocodiles and other aquatic life (Mpandeli, 2024)

The Coalfields of Mpumalanga are also one of the highest-emission regions in the world, with poor air quality. This significantly detracts from its appeal as a tourist destination, particularly as an outdoor and nature-based destination. Such destinations are typically associated with a healthier environment than "big city" life, from which residents seek to escape.

Against this context of pollution from mines and Eskom, it should be noted that remediation work undertaken by mines is not always adequate to rectify the damage from mining. Nor is it always in compliance with minimum legal requirements.

Infrastructure services

Coal trucks on the road can be a major problem, and lead to potholes. They are also a traffic accident risk. Nonetheless, for the most part, national roads are in a good condition, and tolled. The smaller roads inside towns and some regional roads have noticeable potholes. The road to the Olifants River Lodge, one of the largest establishments in the region, is not well maintained and can be closed during bad weather, damaging business operations.

Telecommunications were not cited as a major challenge by any establishments.

For electricity and water provision, many of the accommodation establishments have water tanks, boreholes and generators for electricity to address loadshedding and other problems with distribution. Intermittent energy supply is a challenge for some firms. Water disruptions in Secunda were also identified as problematic.

Agglomeration advantages

In 2011, Emalahleni was home to approximately 300 000 people; Steve Tshwete to 250 000; and Emakhazeni, 45 000. Msukaligwa has five major towns: Breyten, Chrissiesmeer, Davel, Ermelo and Lothair. Together their population was 150 000 in 2011. Bethal and Secunda each were home to between 40 000 and 90 000 people in 2011 (Statistics SA in World Bank, 2024).

The municipalities that host the strongest accommodation clusters – i.e. Emalahleni, Steve Tshwete, and Msukaligwa – all scored high on their agglomeration characteristics in the diversity of their industrial and skills bases, and domestic market access. Emalahleni and Steven 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).

Middelburg and Emalahleni are both vibrant industrial towns. Study tours have occasionally taken place for visitors to experience major manufacturing facilities, industrial sites – mines, factories, major farms – but are not routinely offered. The Middelburg Chamber of Commerce and Industry sees potential for further study tours to the manufacturing facilities in the area as a form of educational tourism.

Market segments

Business travellers from the mines and Eskom, and their suppliers, book nights across the province and the different categories of accommodation. Some properties have regular long-term guests, and in certain accommodation establishments, contractors will book out properties or rooms for months on end. In Emalahleni and Middelburg, government business is also a key driver of business tourism, with conferences and events supporting hotels. In Secunda, the downturn in Sasol's performance has negatively impacted expenditure at tourism facilities. In Ermelo, not only is business tourism from the mines, Eskom, and the insurance and finance industries, it is also linked to agricultural firms in the area. Chrissiesmeer, like the other towns, also relies in part on the patronage from nearby mines.

There is very little leisure tourism – from domestic or foreign markets – in Middelburg or Emalahleni towns, or Secunda. Small domestic events (parties, corporate events) do, however, play a role in generating demand for catering and accommodation. Golf and other activities are supported by local residents. Outside of the main central business districts of these towns, on the rivers and the dams, there are more leisure activities, with domestic tourists and locals enjoying these sites for recreation on the weekend.

When foreign leisure tourists occasionally stop off in Middelburg and Emalahleni, it is an overnight stop, and they do not explore the towns. Corn & Cob attracts some of the foreign tour group market for a lunch stop and visit to the Ndebele village en route to Kruger National Park. Event tourism is important at Corn & Cob, and other venues in the region, and wedding tourism has become an important niche market, particularly in and around Chrissiesmeer and Ermelo. This is domestic leisure tourism, from Pretoria, Johannesburg, and Mbombela for the most part, although wedding guests likely come from other parts of the country too, and possibly elsewhere in the world.

Some foreign self-drive leisure tourists travel by car between the Southern Kruger National Park and northern KwaZulu-Natal. They often spend the night en route in Chrissiesmeer and Ermelo, booking guesthouse accommodation on the way. Small-scale events and nature-based tourism are also drivers of demand in the west of Coalfields region.

Ermelo, with its proximity to Eswatini, also hosts Swazi families visiting their children at school in Ermelo, or using the private hospital there.

Sustainability, inclusivity, and low carbon tourism

Of the establishments interviewed, most have backup generators and do not use renewable energy sources. Boreholes and water tanks are common too. These establishments are not involved in any coordinated processes to link tourism to a broader sectoral response related to inclusivity, or low carbon tourism, or a just transition.

Outside of the Coalfields, Kruger National Park has programmes to support community development, including a community levy on all bookings at the park. The United Nations Development Programme's Small-Grants Programme has also awarded funding to enterprise development programmes linked to the park's operations. Greater Kruger Strategic Development Programme, a partnership launched in 2020 between the South African government, the private sector and local communities, is exploring ways to unlock more finance through nature-based investment mechanisms. Biodiversity offsets are being investigated, including where mining companies are the offtakers of these biodiversity offsets. Two examples given are that of Vele Colliery at Mapungubwe Cultural Landscape World Heritage Site and Barberton Mines at Barberton Nature Reserve. Neither falls within the Coalfields region although the potential for biodiversity offsets in protected areas is currently being explored in certain parts of the Coalfields too.

Within the Coalfields, Anglo American's Green Engine project, centred around Thungela's Kromdraai mine (which stopped operations in 2020), involves repurposing mine waste and degraded land using renewables, bio- energy and agriculture. WWF-SA is exploring site-specific business opportunities, as well as a demonstration facility for business opportunities around mine water – and land treatment. Land and water bodies rehabilitated from mine use could benefit from tourism in the future, where tourists or locals seeking recreational opportunities become users generating income for the sites.

4.4 Conclusion: Key takeaways

Findings from the survey indicate that most tourism firms that operate in Mpumalanga are concerned about climate change and that many undertake some green and socio-economic actions to improve the sustainability of their operations. Furthermore, industry recognises the role that tourism can play in protecting biodiversity and wildlife, but also see risks to biodiversity and wildlife conservation from tourism (presumably where tourism is poorly managed). Job creation and rural economic development are also major opportunities identified for tourism. In general, it appears that tourists are more likely to ask questions about sustainability, including of business operations, than business partners. Community benefits is the main area of interest to tourists, and of critical import in terms of justice. There is also a clear desire from firms to better understand how to take sustainability action and also a call for enhanced government competencies in this area.

In terms of natural endowments, the area around the Coalfields has many cultural heritage sites, but these sites are not well developed, preserved, or marketed for tourist use. Furthermore, while there are nature reserves and dams, the nature reserves are not readily accessible to tourists. At the dams, several guest lodges and facilities exist, mainly used by locals and domestic tourists who participate in fishing and boating. There are, however, no iconic attractions or experiences at the dams that are bookable by tourists who don't stay in accommodation on the dams. Events are held routinely, many small-scale – and sometimes larger-scale – particularly around Loskop, Witbank and Middelburg dams.

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 few spending one or more nights in the area.

Business tourism is the main market across the Coalfields with towns like Secunda relying heavily on business to the area related to Sasol. Emalahleni and Middelburg received business tourists across industries and government, and so too does Ermelo.

In the east of the Coalfields, Ermelo and Chrissiesmeer already attract several niche leisure markets, including self-drive foreign tourists and domestic wedding tourists, among others. These towns have also cultivated a series of small-scale, mainly local tourism events. Given the excellent location of Ermelo and Chrissiemeer in relation to Eswatini, and where major national roads cross, as well as proximity to Mbombela, Johannesburg and Pretoria, this region is well positioned to expand its leisure tourism offerings.

Pollution of water sources – lakes, dams and rivers – is a deterrent to tourism and harmful to the ecosystems of the area. 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 their own 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 with the 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.

5. DISCUSSION AND PROPOSALS

5.1 Introduction

This study draws on various data sources to establish market-aligned opportunities for tourism growth in the Coalfields. In this final section, the "who (which tourists)", "what" (what experiences),"where" (in the Coalfields) and the "how" of realising tourism potential is considered.

Approach

Key findings from the preceding sections are drawn on to provide options for the realisation of tourism potential, based on locational advantage, current and underserved markets, and gaps in experiences.

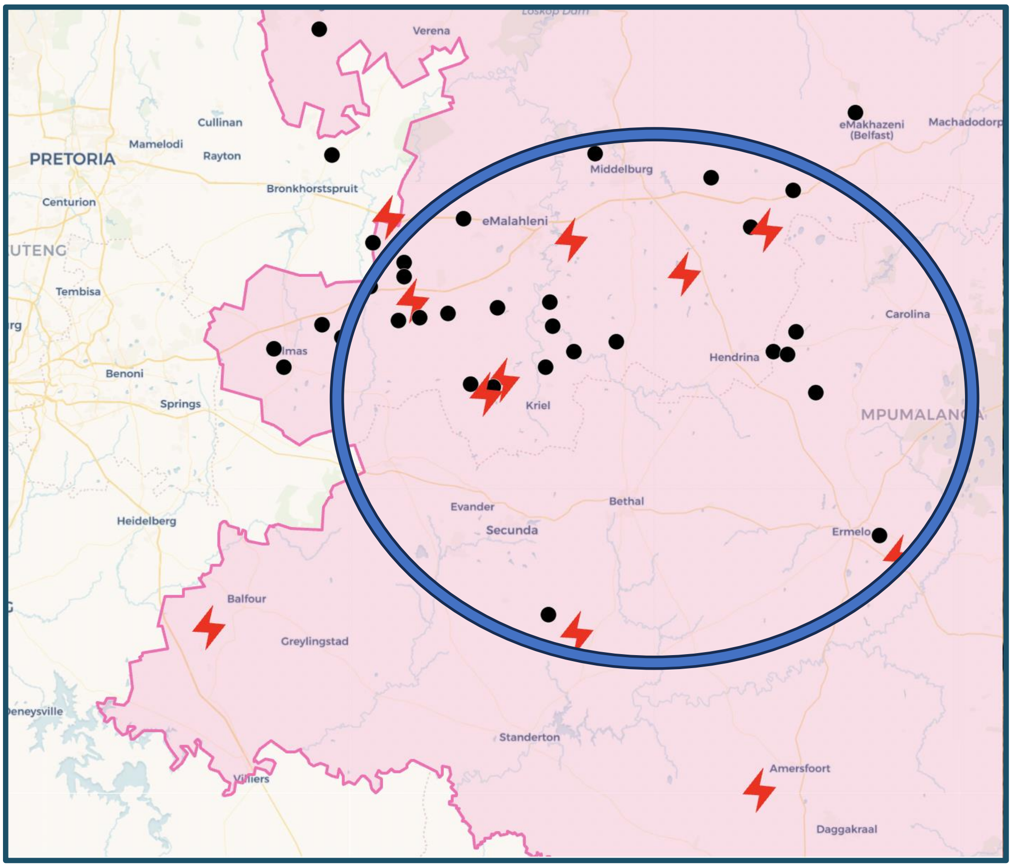
Based on this, two different approaches of "how" to realise tourism potential are discussed: through cluster upgrading and/or anchor investments. While these approaches represent different pathways, they are not necessarily mutually exclusive. In addition to exploring these two approaches, the analysis considers the potential for cultural and heritage tourism; and more general enabling environment requirements for tourism in the Coalfields.

5.2 Discussion: Tourism potential

A locational advantage

The study area, indicated in Figure 42, has been curtailed to focus on towns most reliant on coal mining and coal power generation, as well as Sasol operations. While this helps to spatially focus the study, it is important to recognise that tourists have little regard for artificial boundaries of local municipal, district municipal, coal mining or similar formal or informal demarcations.

Figure 38: Location of the Coalfields, Mpumalanga



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

Rather, how tourists move through space and where they stop and spend money is determined by the appeal of the area (including awareness and perceptions of it), accessibility, time, budget, and interests or requirements. For many leisure tourists, the Coalfields are simply a stop-off en route to Kruger National Park or elsewhere in the Lowveld.

As tourism is by definition travel outside of a person's normal environment, for all purposes other than paid remuneration in the destination, the ability of regions to attract tourists is significantly impacted by geographic factors, such as:

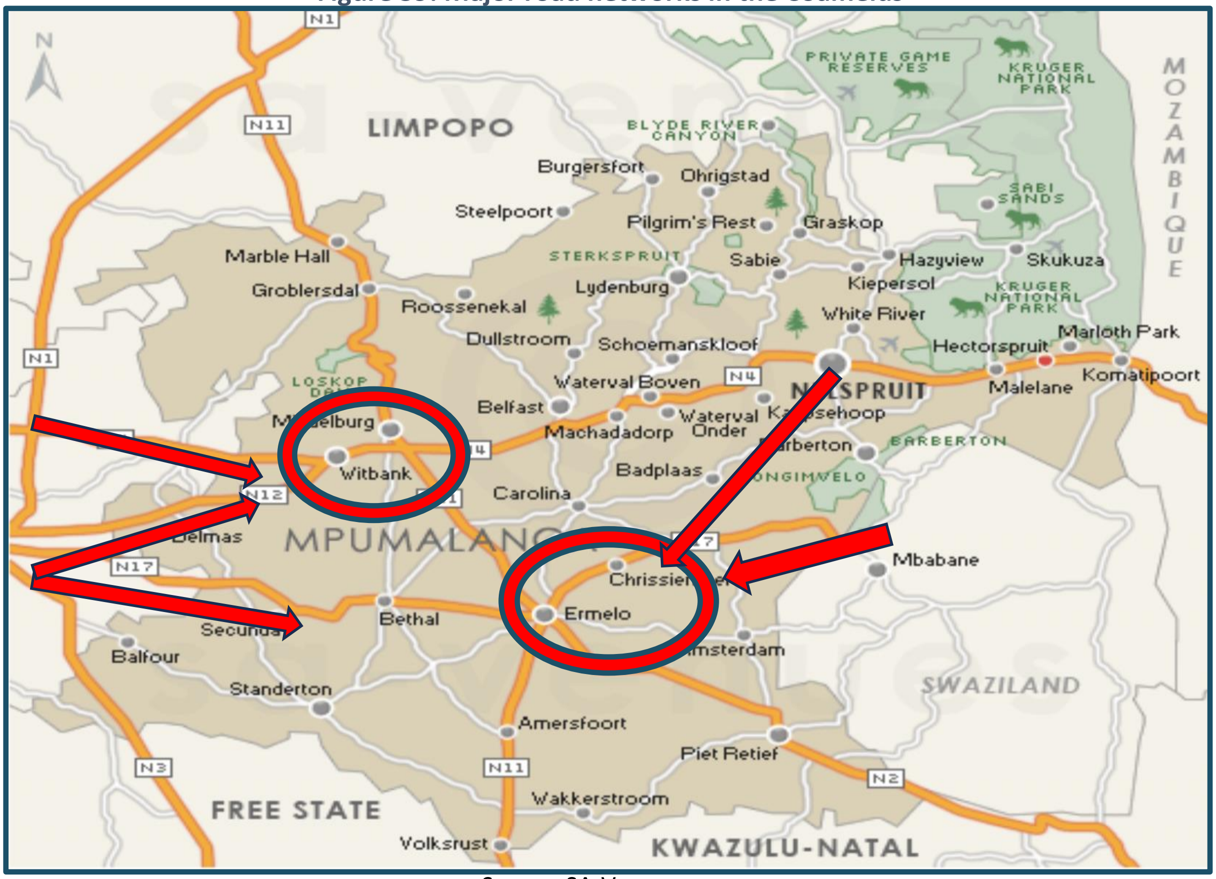
- Connectivity and transport infrastructure: places on or close to areas of high road traffic or airports can far more easily tap into markets than those that are remote.
- Proximity to major tourist-generating markets: places close to cities that have high numbers of residents with some disposable income can capitalise on this potential.
- Major destination attractions: places en route or close to major attractions, like World Heritage sites, or major national parks, or major entertainment complexes, can leverage off the existing flows of tourists in the area.

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.

With the N4 passing through Emalahleni and Middelburg and then on Mbombela and Mozambique, and the N17 taking traffic from Eastern Johannesburg to Mbabane, the Coalfields can do more to capitalise on its location.

As Gauteng is home to about 15 million people and is the richest province, the Coalfields' proximity to Gauteng's residents and businesses creates opportunities for leisure and business tourism alike.

Figure 39: Major road networks in the Coalfields



Source: SA-Venues.com.

5.2.1. Current and underserved markets

The dominance of domestic business tourism

Business tourism includes business travel (individuals travelling for individual work meetings, and similar) and business events (organised meetings, conferences and exhibitions). Business tourists are usually corporate and government employees. Some business tourists might stay for several weeks or months on contract or project work. Or they may regularly return to an area over the course of a year or more.

Independent business travel and business events are both common in the Coalfields, with business events particularly common in Emalahleni and Middelburg, at the heart of the Coalfields, in close proximity to Gauteng. Neither Emalahleni or Middelburg have strong scenic appeal as towns, or a broad recreational offering and the leisure tourism offering is limited, although they are likely to have considerable VFR, given their population density. The malls and the Ridge Casino are the main town-based sites of activity. Witbank and Middelburg dams are frequented sites of nature-based recreation. They provide opportunities for boating and angling.

There is a gap in the market In Emalahleni and Middelburg for b/leisure (business and leisure) offerings. This might include:

- Leisure/ recreational experiences for business travellers to the area, and VFR tourists, in the evening, or over the weekend.
- Team building or similar experiences to provide a leisure element to business tourism (conferences, meetings) packages.

Emerging leisure segments in the East

Bethal, Ermelo in the East, and nearby Chrissiesmeer have more diversified economies that also draw on a strong agricultural base. Mining, energy, telecoms, insurance and banking industries all support the overnight economy of the area. Chrissiesmeer provides a leisure tourism offering with its lakes, historic buildings, bird watching, and regular small-scale events. A regular, albeit slow, flow of foreign self-drive leisure tourists travel from Kruger National Park to Northern KwaZulu-Natal through Ermelo and surrounds. Some tourists will spend the night in the area, but seldom extend their trip beyond this.

Ermelo also has an emergent wedding tourism industry, with four venues on farms offering rural wedding offerings. Some innovation is evident among local firms, with a parkrun being held on one farm on weekends, and investments taking place in agri-tourism experiences. Chrissiesmeer has seen the redevelopment of historic buildings into an hotel and bed and breakfast. The lakes for which it is known are, however, not readily accessible to the public and it is difficult to circumnavigate these on foot or hire kayaks or similar. The land around the lakes is private and held by farmers.

In Ermelo, Chrissiesmeer and surrounds, a gap exists in leisure offerings including anchor experiences, and a lake route/ similar around Chrissiesmeer. This might include:

- Experiences to entice self-drive domestic and foreign tourists to spend an additional day in the area when travelling between Northern KwaZulu-Natal and Kruger National Park.
- Wedding tourists, hunters, fishers, and other niche markets, who would be interested in other local experiences during their stay.

- Intraprovincial tourism from the surrounds and Emalahleni, Middelburg and Mbombela residents, who are interested in weekend trips.
- Extending the existing events calendar and activities for greater market reach.

The resident leisure economy

While the remit of this study is tourism, the broader visitor economy concept is important. This concept includes all visitors to sites and, therefore, the recreational activities of local residents too. Visitor attractions and activities around the world rely on both tourists (from outside their normal environment) and local visitors. In fact, resilient destinations typically have a significant share of local visitors that support activities and attractions throughout the year particularly when there are major events that might disrupt tourism, or during the tourist off-season. Local visitors also bring a sense of authenticity to experiences that many tourists seek out.

Emalahleni and Middelburg in particular have many residents who could be a market for additional recreational experiences.

Swazi and Mozambican tourists

Regional tourism is highly motivated by visits to friends and relatives, with some travel for shopping purposes, and a small share for education, medical, reasons. SADC tourists have on average a low trip spend. Socialising is important for SADC tourists, as is shopping for personal and business reasons. Malls, markets and entertainment are important attractors for this market.

Most VFR tourists stay with friends and relatives and, as a result, the primary research could not determine more about these tourists than is provided in published data by South African Tourism. There is a clear gap for improved market insights about regional tourists in Mpumalanga and niches within this that could be targeted for increased spend including on experiences. Anecdotally, Swazi tourists stay in Ermelo for medical and educational reasons.

Table 8 summarises insights into the various market segments and highlights possible experience gaps. These gaps or opportunities for enhancing tourism are discussed in Section 5.3, which follows the table.

Table 8: Indicative market segmentation tool for the coalfield, identifying experience gaps warranting further assessment

<table>
<tr><th>MARKET SEGMENTS (BY ORIGIN AND MAIN VISIT PURPOSE)</th><th>BOOKING AND INFORMATION CHANNELS</th><th>PURPOSE OF EXISTING TRIPS/ STOPS IN COALFIELDS</th><th>MAJOR CONSIDERATIONS</th><th>EXISTING EXPERIENCES</th><th>GAPS</th><th>BENCHMARKS</th></tr>
<tr><td colspan="7">FOREIGN</td></tr>
<tr><td>Long haul holiday market: Coach tours</td><td>Destination management companies</td><td>Stop over en route to Kruger</td><td>Short stop – a few hours at most.

Fits interest, price points and timing of tour schedules.</td><td rowspan="2">• Botshabelo – used to attract coaches but in disrepair.
• Little Elephant burnt down
• Corn & Cob
• Mining museum mooted for Emalahleni in the IDP.
• Chrissiesmeer and Ermelo are en route from Kruger to Emalahleni, but only feature as an overnight layover</td><td>• Compelling cultural/ community/ heritage experience
• Good craft and design</td><td>Cultural attractions:
• Khwattu
• Battlefields
• Apartheid museum
• Craft and Design:
• Watershed, V&A
• Rosebank Market</td></tr>
<tr><td>Long haul holiday market: Self-drive</td><td>Direct</td><td>En route to Kruger; En route from Kruger to Northern KwaZulu-Natal</td><td>Anchor attractions, Consumer reviews, social media, interests, budget, time; online booking platforms</td><td>• Exemplary local food offerings
• Retail
• Major / anchor attraction/s
• Appropriate stopover destinations</td><td>• Destination wine estates
• Wine route</td></tr>
<tr><td>SADC: VFR, personal and business shopping tourism;medical; educational</td><td>Direct</td><td>VFR, shopping</td><td>Limited recreational activities, shopping and family socialising is key</td><td>Shopping malls, schools, medical facilities, some recreational activities</td><td>• Not clear: more recreational activities for families; shopping; markets; entertainment?</td><td></td></tr>
</table>

MARKET SEGMENTS (BY ORIGIN AND MAIN VISIT PURPOSE)	BOOKING AND INFORMATION CHANNELS	PURPOSE OF EXISTING TRIPS/ STOPS IN COALFIELDS	MAJOR CONSIDERATIONS	EXISTING EXPERIENCES	GAPS	BENCHMARKS
DOMESTIC						
Gauteng: leisure trips	Direct	Weekend events (weddings; sports), VFR, recreational (fishing, golfing groups, etc.)	Awareness Appeal Cost Quality Distinctiveness	Ermelo wedding activities. Chrissiesmeer heritage, biodiversity, nature based events and location. Fishing, golfing, hunting	Witbank dam meander – by water Improve dam based water experiences around Chrissiesmeer More experiences around Ermelo	• Dullstroom • Wakkerstroom • Clarens
Gauteng: business trips	Direct, by company booking agents, inhouse and corporate travel agents	Contractors; Business meetings	Budget Location Amenities at accommodation	Preferred guesthouses	Recreational experiences	• Midlands Meander • Magaliesburg
Gauteng: Meetings, Conferences and Exhibitions	Either internal to company or Professional Conference organisers.	Meetings, conferences, exhibitions	Time Cost Flexible packaging	Hotels and guesthouses accommodate in house events	Team building facilities and experiences	• Magaliesburg / Muldersdrif examples
Provincial/ local are: leisure/ recreational trips	Direct	Visits to friend and relatives Eating out Hunting Angling	Cost Appeal Accessibility Quality	Dams, malls, casinos	Adventure and activity based tourism; more events.	• Graskop Gorge
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

Source: Author.

5.3 Development pathways in tourism

Investments in tourism and the resulting job creation are unlikely to replace the jobs lost in coal, Eskom and related industries in Mpumalanga. It's also important to acknowledge that tourism jobs in Coalfields are also at risk – as many tourism firms are reliant on business travellers from these industries.

While tourism cannot replace coal-mining, it can be part of the economic reorientation of the Coalfields region, and support new SME enterprises, 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 business related to coal and associated industries.

The proposals in this section suggest how to galvanise immediate potential and purposively and practically build on it as a response to current and potential market demand, drawing on experiences from other countries and elsewhere in South Africa.

Multiple potential tourism development pathways are possible. The agency and interplay between community, organisational and individual actors at different scales will determine the spatial, temporal and directional elements of the tourism pathway (Butler, 2024). Trigger events (Hall, Prayag, and Fang, 2024, like the phase-out of coal-fired electricity, can be galvanised to transform Coalfields' tourism into a new set of dynamics and emergent elements.

In the case of the Coalfields, both private and public sector actors in tourism appear to have relatively less agency, including resources, than other actors (such as in mining, agriculture, and national government). 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 seeks to leverage existing market demand and tourism SME efforts to upgrade the overall cluster. This would then result in a virtuous cycle of entrepreneurship and innovation, and inclusion – if designed with this in mind, as in the case of the wine route or Midlands region that saw tourism emerge over time. This approach is more of an incrementalist and bottom-up approach, heavily reliant on private sector agency, with government support.
- An anchor investment approach, which prioritizes interventionist investment/s in a major anchor attraction, or more than one, to significantly pull in tourists, including from segments not currently served through a major drawcard. This approach is more of an interventionist and top-down approach, heavily reliant on a lead mining firm and government, with other private sector support.

SME Cluster upgrading or Anchor investment approach?

The examples of post-mining and agricultural tourism in Section 3 profile both kinds of approaches. While SME cluster upgrading is best demonstrated by the wine tourism route, which grew over time and is comprised of a cluster of SMEs, the more interventionist approach of investing in an anchor attraction has been taken by several post-mining regions. Major investments in environmental remediation and repurposing of mining infrastructures, as well as cultural investments in concert halls, museums and the like, have created the basis for attracting new leisure tourism to these regions.

While SME cluster tourism has developed 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 largely publicly financed. As indicated in the case studies of European post-mining tourism, after initial public funds, “bottom up” private sector initiatives have assisted in cementing a diversity of destination experiences through placemaking.

These approaches are not mutually exclusive. It is possible to use a catalytic investment to also spur on smaller-scale entrepreneurial tourism clusters around major anchor sites, which can develop to cater to demand pulled in by the major attraction.

5.3.1 Exploring the potential of a SME cluster development approach

Emalahleni and Steve Tshwete:
Diversifying from business tourism into bleisure and enhancing local recreation

Currently, 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, some with discretionary expenditures for recreation and leisure activities. Spurring on developments to service these markets through new and/or enhanced visitor experiences could drive longer trip lengths, higher trip spends, and an improved product offering.

An obvious 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 itbank 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 Partnership (Emalahleni Local Government, 2020). While this might be a priority, investment in experiences will also be key to driving visitor volumes.

Rather than investing in more accommodation at these dams, improved experiences on the dams warrants 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 the 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.

New business opportunities are possible, as well as employment creation, and experience development, to position the area in terms of 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 providing a clear environment for permits, leasing, recreational activities on the dams, and monitoring and evaluation thereof.
- Infrastructure enhancements for access to and around the dam.
- Funding for marketing of a dam route – 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.

There is also a case to be made for investing in road infrastructure to the dams as well as the Olifants River Resort which remains a major accommodation and conferencing destination in the region, but is limited by poor road access.

Ermelo, Chrissiesmeer and surrounds

Ermelo and Chrissiesmeer have a strong nature-based offering, and already capture domestic leisure tourism (including weddings and other events) and foreign self-drive tourism (when tourists travel between Northern KwaZulu-Natal and Southern Kruger National Park, and vice versa). These towns are particularly well-situated en route to Eswatini and at the crossing point of major national routes.

To attract overnight tourists and keep them in the area, more investments are needed in visitor experiences. Creating shared infrastructure could allow tourists to explore across the Chrissiesmeer lakes, for example, and build on the farm-based events and agritourism, such as 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 lakes to allow for non-motorised access and experiences
- Infrastructure enhancements for access to and around the dam, such as boardwalks, jetties, birdhides, interpretative boards
- An inclusive process that brings 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.

5.3.2 Exploring the possibility of an anchor investment approach

A mine museum has been identified in the Emalahleni IDP as one of the priority tourism projects. There are currently no mine museums, and the region could benefit from one. How and where this is developed, and which visitor markets it seeks to attract, must be carefully investigated, given the limited market demand and challenges – as indicated above – with heritage sites. Based on the European experiences and that of Indonesia, a mine museum might be more successful if part of a larger mine redevelopment, with other components too, particularly adventure and activity-based experiences, which can pull in different visitor markets.

A partnership could be pursued with a mining house that is busy with water and land rehabilitation, and SME development, in which tourism development is investigated, drawing on experiences from Europe, including:

- Repurposing buildings and land, including coal dumps, to provide sites for activities.
- Creating multiple experiences, including mine-based historical tours/exhibitions, activity-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/exhibition space.

This study has not reviewed potential mine sites nor the viability of such major projects. Many defunct mines exist in Mpumalanga, such as Castle Colliery, Clydesdale, Coniston, Highveld Colliery, Klipfontein, Phoenix, Rietspruit, Springbok, South Witbank, Tavistock, Transvaal and Delagoa Bay Colliery and Wildebeestfontein Colliery (Coaltech, 2004 in Coal, M, 2024). As already referenced, the Kromdraai coal mine near Witbank, formerly an Anglo American operation and now the responsibility of Thungela Resources, is considering a 'green engine' devleopment, with many different small business.

5.3.3 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. For this reason, it warrants some consideration and discussion.

Despite the numerous sites of ancient heritage, early African and European settlements, South African War, and resistance and liberation history in the Coalfields, few are well-developed or maintained. Little exists to attract and retain visitors; and information on these sites is not marketed or forthcoming[6].

From a demand perspective, cultural and heritage have select appeal – particularly for school learners, or students of further educational and training; and other niche interest groups. For example, parts of Northern KZN attract groups of British and other European tourists interested in the Battlefields. This niche appeal challenges commercial viability. As already indicated, the Louvre-Lens in Northern France is significantly funded by the government, including for operations, as income from visitors is not sufficient to finance the museum.

Foreign tour groups and self-drive tourists may visit a well-developed and marketed (and priced) heritage and cultural experience en route to Kruger. Historically, Botshabelo and Little Elephant received tour buses. With the disrepair at Botshabelo and fire at Little Elephant, no such major cultural heritage site exists to capture demand from foreign tour groups en route to Kruger. Corn & Cob appears to have attracted some of this displaced market with an Ndebele village concept, and buffet lunch offering to tour groups.

This 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 C. a., 2016, Vol 31). In general, in South Africa, heritage attractions do not typically perform as well as nature and adventure attractions. For example, at the UNESCO World Heritage site of Robben Island, Cape Town, 45 000, 37 000 and 35 000 tourists were received in 2018, 2019 and 2023, respectively. This was far fewer tourists than any of the other Big Five tourist attractions in Cape Town with Cape Point, Table Mountain Aerial Cableway Company, and Kirstenbosch each received more than 100 000 tourists in each of those years. Another example exists in the Cradle of Humankind, with its visitor experiences at Maropeng and the Sterkfontein caves, which has consistently battled to achieve commercial success. It is financially supported by provincial

[6] 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.

government, despite major initial investment by government in iconic facilities (Cradle of Humankind World Heritage Site and Dinokeng Projects, 2023) and proximity to Gauteng markets.

Craft and design industries

While the approach of this report has been to scope market and economic potential, in terms of a socio-economic justice objective, particularly for vulnerable and excluded communities, the craft and design industry has 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. This needs to be assessed formally for feasibility. It could take the form of:

- 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.

There may be potential to develop a contemporary art and craft marketplace close to the N4, which can attract tourists and others en route, and support the emergence of artists and crafters. Strong institutional support and funding, and a design that caters to the needs of tour buses, could direct tourist financial flows straight to producers. Co-located at a petrol station or similar site with high levels of accessibility and traffic, this could support small scale crafters.

Furthermore, the Ndebele design aesthetic could be applied as a place-making tool 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. This, too, could direct opportunities to local artists, particularly women, creating direct benefits from tourism and place-making more generally. The Cape Craft and Design Institute has been working with emerging artists for over two decades and offers a variety of design and marketing initiatives, and programmes. It might be a possible institutional partner to develop a similar programme in Middelburg and Emalahleni. A market site would need to be identified; this might be a role for provincial government, with access to key sites, although the complexity of PPPs could challenge the efficacy of this.

5.3.4 Enabling conditions for tourism potential

Tourism thrives when the enabling environment is supportive.

Tourism capabilities – skills, institutions, funding, collaboration –require investment. The SATSA survey findings indicated industry's concerns with their perception of government inaction or inefficiency. 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.

The agency of local actors – be they private, public or community actors – to realise tourism's potential for economic diversification requires more focus and support, as well as investment in strong partnerships across these actor groupings. In terms of sustainability, he SATSA survey indicated a desire from tourism firms for greater awareness and education on sustainability, and advice on certification.

In addition to tourism-specific investment and agency, 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, 2024b) as well as interviews with tourism stakeholders, indicate several barriers to tourism development. These also emerge through the SATSA survey.

- Safety and security remain a concern for tourism firms. A particular area of this relates to illegal mining in the Coalfields, which must be addressed. This is currently a risk to tourism, creating additional safety and security concerns. Pilgrim’s Rest tourism has been significantly disrupted by illegal mining.
- 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 tourist 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 a priority area, not just for tourism, but broader socio-economic and environmental al justice. WWF South Africa is already active in this space and their work can leveraged to extend its application.
- 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.
- 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 government to identify roads that require upgrading.
- Electricity and water supply: Tourism and other firms, and households, are increasingly internalising the cost of basic infrastructure provision. For tourism firms, they must ensure security of supply of electricity, water and telecommunications for visitors and guests. Disruptions to these basic infrastructure services has a negative impact on businesses, increasing costs, and reducing demand.
- Local government capabilities, rates and taxes

  One example was cited of double rates being levied on an agri-tourism business. These sorts of local government barriers to tourism, or red tape, must be addressed.
- SME and cluster upgrading support

  SME support and access to finance (together) are required to support the inclusion of and commercial viability of black-owned tourism SMEs. The lack of bankable business concepts, limited collateral and equity contributions from SMEs, and the very small nature of many businesses, as well as highly competitive and variable operating contexts, challenge traditional finance offerings. Concessional finance, paired with more extensive market intelligence and market access from linkages with existing firms, can enhance business viability. Tourism incentive finance that support collaborative and inclusive innovation in building clusters, could be considered to drive cluster upgrading and create further SME opportunities within this expansion and enhancements of destinations, and growth in market segments.6.67.

6. CONCLUSION

Tourism is already an important economic sector in Mpumalanga, although, relative to other industries in Nkangala and Gert Sibande district municipalities, it is not a major contributor of jobs or income. This is at least in part due to mining in the Coalfields area, which creates competition for land use, and has polluted the environment, detracting from leisure tourism appeal. Nonetheless, there exists a vibrant business tourism market (partly dependent on the mines, Sasol and Eskom, and therefore also at risk in the medium to long-term) and some emerging leisure niche markets in the east of the Coalfields, as well as a recreational base among residents.

There are experience gaps for all of these segments. To attract investment into experiences that can draw in more tourists and increase expenditure, two approaches are possible. An SME cluster upgrading approach would see existing businesses receive additional support to upgrade their clusters, building on existing private sector innovation and investments. It would also involve further investment in infrastructure from the government, both in terms of access roads, as well as visitor infrastructure like boardwalks, paths, interpretation boards, and similar. Partnerships between government, industry and community would help cement an inclusive tourism path.

A more interventionist or anchor attraction approach could see a large mine site redeveloped to attract tourists. There is unlikely to be sufficient demand to develop multiple such mine tourism complexes in the Coalfields, and the selection of an appropriate site would require careful consideration. A site closer to Gauteng might benefit from easier market access to residents from that province, as would a site near national roads. If such an endeavour is undertaken, it should draw on the lessons from other mine redevelopments in the context of economic restructuring. While an initial phase would require significant site regeneration, thereafter, multiple facilities and experiences should be considered to cater to different visitor markets. This would allow for greater market diversity for resilience and to ensure different income streams.

Both of these development approaches are possible. They are also not mutually exclusive. Building a strong tourism economy requires that the private sector – nearly all of which is comprised of SMEs in tourism - be supported to get organised into industry associations or similar collaborative networks with shared destination plans. The public sector tourism planning and execution, as well as coordination capabilities, also requires skills and resources.

Tourism destinations rely on effective partnerships between industry, government and community to thrive. As indicated in the case studies from elsewhere in the world and the wine route in Stellenbosch, strong partnerships need to coalesce around a shared regional development vision. There are examples of innovation funds and regional development grants that have targeted tourism cluster and experience upgrading to attract high potential market segments, and such an approach could be considered for the Coalfields too[7].

In terms of a just transition, linking tourism with craft production, and the creative industries more generally, could create the most immediate and direct benefits to small-scale black producers and makers. The development of craft and design industries linked to the Ndebele visual motif and heritage should also be investigated. This could create strong linkages with tourism for merchandise and a stronger and more coherent visual design language for Coalfields place-making appeal.

To ensure that tourism investments support a just transition, appropriate financial and non-financial support for black-owned business inclusion and development is also essential.

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[7] A separate project for TIPS, funded by the Agence Francaise de Developpement, considers the design of such as Tourism Experience fund for Mpumalanga.

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