Western Cape Government

Tourism Blueprint 2030

Department of Economic Development and Tourism

Contents

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The Tourism Blueprint 2030 has been a truly collaborative effort among a unique multi-disciplinary team of stakeholders. The document would not have been possible without their fervour and profound knowledge.

Message from Mr David Maynier, Western Cape Minister of Finance and Economic Opportunities

The tourism sector has long been the backbone of the Western Cape economy, supporting thousands of direct and indirect jobs thanks to the millions of tourists who flock to the region annually to enjoy our unique experiences and wide-open spaces.

However, the tourism sector has been hard hit by the Covid-19 pandemic and so, more than ever, we need a long-term growth strategy that will support the recovery of the sector while also providing a vision for the future of tourism in the Western Cape.

The Western Cape Tourism Blueprint 2030 does just that, and aims to boldly build a thriving visitor economy that increases its contribution to the Western Cape economy while creating a sustainable and competitive destination for years to come.

Tourism Blueprint 2030 is an essential component of the Western Cape as a sustainable tourism destination, and looks at the 'big picture', providing a blueprint to bring individual strategies together to serve one vision.

I would like to take this opportunity to thank all who have dedicated their time in participating in the strategic discussions that contributed to the development of the Tourism Blueprint.

We look forward to delivering on the vision of Tourism Blueprint 2030, rebuild the tourism sector and together continuing to build a world-class tourism destination that creates jobs and grows the economy in the Western Cape.

Warm regards
Minister David Maynier

Message from Mr Solly Fourie, Head of Department: Department of Economic Development and Tourism

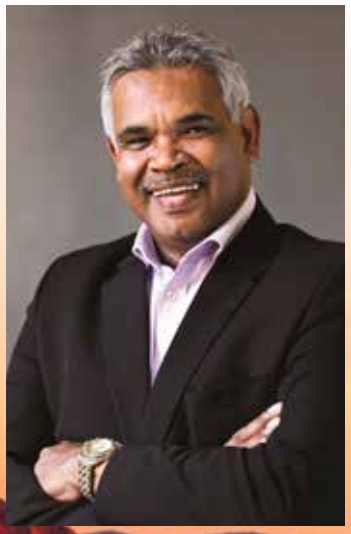
At the time of writing, the world finds itself amid a global pandemic that has devastated the global tourism economy. The Western Cape has not been spared. While this event delayed the publication of Tourism Blueprint 2030, as the Department needed to grapple with the implications of the pandemic, Covid-19 has ultimately shown the clear need for a long-term roadmap for the industry.

Now more than ever we need a shared vision for tourism – a vision that is underpinned by the imperative of building a resilient tourism industry, one that can better withstand the shocks our globalised world increasingly faces, while ensuring that the Western Cape continually emerges as a destination of choice amongst global travellers.

Tourism Blueprint 2030 is as relevant now as it was when we embarked on the process over a year ago. We've certainly had to make adjustments but the long-term vision remains the same, as are the fundamental actions required to realise this vision.

Tourism Blueprint 2030 reinforces the Department's objective of supporting a demand-led, private sector-driven approach to tourism growth and employment creation. However, this strategy is not one developed for the Department of Economic Development and Tourism alone but for all tourism industry stakeholders, who will have to continually work together to achieve the envisioned outcomes and to ensure that shared value is created.

I remain encouraged by the ability that the industry has to come together, as well as its agility in doing so. This despite a pandemic, which easily represents the biggest challenge faced to date. With this determination and working collectively towards a singular objective – a resilient, sustainable, and competitive destination – our province can achieve much over the coming decade. As such, Tourism Blueprint 2030 also aligns with our broader economic recovery objectives which are for the economy to 'bounce back and bounce up' by focusing on high-potential industries.



As described in the roadmap, the Western Cape Government will be investing in the five core components in support of Tourism Blueprint 2030. These are:

- Tourism infrastructure
- Tourism product development
- Destination marketing
- Visitor services
- Institutional arrangements and regulation

Lastly, rest assured that in the short- to medium term, the Department will continue to support the industry through the immediate crisis. We have reprioritised our resources and will continue to lobby for industry relief measures across all spheres. We acknowledge and value the role of all partners in this process and depend on your ongoing support in contributing to the growth of the tourism sector and as such the economy of the Western Cape.

Warm regards
Mr Solly Fourie

Covid-19 and the implications for Tourism Blueprint 2030

"As with the post-9/11 travel period, people will now prioritize travel in new ways that allow a connection and authentic experience that acts as a salve for the sense of deprivation in 2020, both in leisure and business settings." – Clayton Reid, CEO, MMGY Global (December 2020).

Tourism Blueprint 2030 sets out the long-term vision for destination Western Cape. The research which informed the compilation of the document was undertaken in 2019 and beginning of 2020. Most of the chapters were therefore written before the Covid-19 pandemic.

Despite the significant impact of the pandemic on global and local tourism economies, the long-term focus espoused by Tourism Blueprint 2030 remains the same.

Simply put, these are:

- Overcoming systemic barriers to growth
- Addressing the underperformance of the Western Cape in recent years in both international and domestic markets
- Improving the competitiveness of the province by better anticipating and responding to changes in our markets in respect of consumer behaviour that is shaped by global forces and trends
- Building district competitiveness and iconicity by diversifying and deepening the product offering
- Leveraging Cape Town's position as Africa's leading business events destination
- Focusing on latent forms of tourism, in particular cruise tourism, Halal tourism and sports and events tourism
- Enhancing institutional capacity to improve coordination, legislative efficacy, and resource mobilisation

To better understand the immediate impact of Covid-19, the Department of Economic Development and Tourism has been researching to quantify the effects of the pandemic and resultant economic slump on the tourism industry. This research will be completed by mid-2021 and will provide a framework for medium-term recovery aligned to the long-term objectives set out in these pages. The Department has commissioned this research as it is important that short and medium-term responses are evidence-based and that the entire value chain is considered.

While the Western Cape is undoubtedly experiencing the worst crisis affecting the industry in generations, history shows that crisis also gives rise to opportunity.

At the start of 2021, analysts such as consultancy MMGY Global are pointing to encouraging signs:

- Lockdowns are fuelling travel intent across the globe
- Consumers are quickly adapting to the precautions necessary to travel safely
- Savings rates are at peaks
- Growing optimism around the roll-out of vaccines aided by peer pressure for people to get vaccinated as well as the rise of travel health apps such as CommonPass
- Research showing that Covid-19 has deepened the desire for more authentic, meaningful, and original experiences
- Trends associated with work from vacation (WFV) and international competition to attract digital nomads

These trends are indicative of some of the factors that will be driving 'bounce back and bounce up' in the coming months and years. Most importantly, Covid-19 has shown the wisdom of focusing on domestic tourists to build resilience.

Executive Summary

To boldly build a thriving visitor economy that increases its contribution to the Western Cape economy while creating a sustainable and competitive destination for years to come.

This is the vision of Tourism Blueprint 2030. A body of work that has been co-created by a broad range of tourism stakeholders to provide a roadmap for the region's long-term tourism vision, goals, objectives, policies and potential investment opportunities.

At the time of publication, the future impact of the Covid-19 pandemic on tourism is yet unknown. Despite this, the benchmarks set pre-Covid remain. This goal is to increase international arrivals over the next 10 years to 3m, with a Total Foreign Direct Spend (TFDS) of R23.74bn and to increase domestic trips taken to 5m, with a Total Direct Domestic Spend (TDDS) of R7.54bn.

These targets may today be ambitious, but they are necessary to optimise the industry's contribution to economic recovery and long-term growth. Tourism, it can be argued, will play an even more critical role in the province's economic planning as a result of Covid-19.

Addressing barriers to growth

Tourism Blueprint 2030 argues that the vision for tourism in the Western Cape will only be realised if significant barriers are removed. These barriers are related to:

- Poor continental air access from restricted air service markets and territories
- A tedious, costly and inconvenient visa regime
- Persistent safety and security concerns
- Small businesses not being agile enough to respond to technological innovation

As has already been shown, the Western Cape tourism industry is also particularly vulnerable to the climate crisis and questions around sustainability will become more pronounced.

Methodology

A seven-phased approach was followed in the conceptualisation of Tourism Blueprint 2030. As illustrated, the process involved an initial planning review, the establishment of an expert tourism advisory committee to guide the process, a consultative phase to orientate the project, a destination potential audit, a market potential assessment and lastly, the formulation of an action plan.

Phase 1: Planning | **Phase 2: Establishment of advisory committee** | **Phase 3: Orientation** | **Phase 4: Destination potential assessment** | **Phase 5: Market potential assessment** | **Phase 6: Action plan development** | **Phase 7: Launch**

Tourism in the Western Cape

Although visiting friends and relatives is a significant travel motivator for the domestic market, it is leisure and business tourism, particularly from international markets, that maximise the economic impact of the sector. In both leisure and business tourism, the Western Cape is already competitive in global and national terms. Tourists from all over the world are drawn to the Western Cape's scenic beauty, iconic city, food and wine, active adventure and culture and heritage experiences. This product depth also means that the province is well placed to capitalise on international travel trends that have dominated over the past decade, notably the shift to experiential and responsible tourism.

At the same time, average growth has not lived up to expectations, either in terms of international arrivals or domestic trips taken. In light of Covid-19, arrivals are only projected to return to 2019 levels in four to five years' time.

To place the industry on a more robust growth trajectory, the Western Cape will prioritise five components:

- Tourism infrastructure
- Tourism product development
- Destination marketing
- Visitor services
- Institutional arrangements and regulation

In terms of product development and destination marketing, the Western Cape will need to do more to address the lack of product offering that meets the needs of the local market in terms of price point and offers. The need to diversify markets – mainly domestic and regional markets will gain urgency in the coming decade.

Forces and trends

An ageing population, rapid urbanisation, climate change, technology shifts, empowerment of the individual and wellbeing are all global forces which are complex and will impact the travel and tourism industry. These forces also encapsulate key trends which the industry needs to respond to adeptly. The use of technology (the world in my hand), a more mindful consumer (personal and purposeful), switching off (digital detox), the joy of missing out (JOMO) and the choice to travel with your family (multi-generational travel) or alone (solo travel) are all trends business owners need to understand. They need to know how they will impact their business, both positively and negatively.

Growing the regional product base

Building the district product base is an essential component of Tourism Blueprint 2030. Towards this end, social media conversation drivers were identified for each of the six districts. Also, an attraction audit was conducted to determine primary, secondary and tertiary attractions. Based on the available product base, gaps and opportunities were identified for each district as described in the diagram below.

The Western Cape tourism nuclei

Primary nuclei
Secondary nuclei
Primary seasonal
Tertiary nuclei

Primary nuclei

The primary nuclei contain markers that are known to the tourist at their place of origin and often provide the main motivation to travel (Dredge, 1999). They usually include iconic attractions that are influential in the tourist's decision to travel – they are a drawcard (Edelheim, 2015). For a visitor attraction to have a primary influence on a tourist's destination, it would require that information is available pre-visit such that it stimulates the motivation to visit the site.

Attributes of primary nuclei:

1. Iconic attraction
2. Information is readily available pre-visit so that the visitor attraction can act as part of the pre-trip decision-making
3. Attraction receives ample media attention

Cape Town Metropolitan Municipality	Overberg Municipal District	West Coast Municipal District	Central Karoo Municipal District	Garden Route Municipal District	Cape Winelands District
4	2	4	0	1	1

Primary seasonal

Cape Town Metropolitan Municipality	Overberg Municipal District	West Coast Municipal District	Central Karoo Municipal District	Garden Route Municipal District	Cape Winelands District
0	1	3	0	0	0

Secondary

Secondary nuclei of attractions are known to the tourist pre-visit but do not play a significant role in the decision-making of the trip (Leiper, 1990).

Cape Town Metropolitan Municipality	Overberg Municipal District	West Coast Municipal District	Central Karoo Municipal District	Garden Route Metropolitan District	Cape Winelands District
7	3	1	4	3	2

Tertiary

Tertiary nuclei of attractions are those that are unknown pre-visit but discovered after arriving in the destination (Leiper, 1990).

Cape Town Metropolitan Municipality	Overberg Municipal District	West Coast Municipal District	Central Karoo Municipal District	Garden Route Metropolitan District	Cape Winelands District
4	4	7	1	4	3

Business tourism

There is growing interest among the business community to meet in Africa, a trend that has sparked a surge in hospitality infrastructure development, making the continent one of the biggest emerging business events marketplaces. In the 2019 ICCA (International Congress and Conference Association) Ranking Report, it stated that the number of international association conferences held in Africa has risen by more than 30%, and delegate attendance has increased by 20% over the past decade, with expectations of continued growth for the next decade.

However, Cape Town has been losing ground to other growth destinations such as Kigali, Nairobi and Marrakech.

To make up for lost ground, the Western Cape will need to implement a concerted effort to grow demand while adapting to new business models emerging due to Covid-19. Towards this end, demand enablers were identified.

Table 1: Demand enablers for the Western Cape business events industry

Enabler	Description	Suggested activity
Industry associations	Associations that represent the industry (e.g. SAACI, SITE, EXSA)	Cape Town and Western Cape to host quarterly meetings with industry bodies to keep them abreast of activities
Accommodation sector	Range of accommodation options available to a delegate	Provide a wide range of offerings at various price points to meet the budget constraints of delegates
Accessibility (air access and visa regulations)	The ease of access (direct flights and visa exemption) supports demand stimulators	Continued focus on improving air access and removal of visa constraints
Venues	Meeting spaces which include convention centres, hotels and unorthodox spaces (e.g. City Halls) in primary and secondary cities in destinations	Demand is rising for unusual spaces and hotels to host business events and for secondary cities Destination development should take this into consideration and combine technology, design and visitor experience into the planning process
Technology	The use of technology as a supplement to offset budgetary limitations on attendance and optimise opportunities arising from hybrid event models in light of Covid-19	Develop an integrated system through the use of mobile apps, facial recognition, virtual reality, artificial intelligence, online sourcing and social media to enhance the delegate experience and reduce costs
Health, wellbeing, safety and security	Health, wellbeing, safety and security are a major concern for delegates and event planners	High responsiveness of destination to show health, wellbeing, safety and security measurements in place
Meetings cost	The perceived cost of a business event for a delegate includes flights, accommodation conference ticket price and pre- or post-tours	Do a study to measure the meeting cost of Western Cape against main competitors to check value for money offering
Legal trends	Data privacy, emergency planning and code of conduct are global legal developments that are creating new 'best practices'	Adoption of meetings management policies to address data protection Development of a comprehensive emerging plan for business events when in destination Development of a code of conduct to address improper behaviour that could take place during a business event (e.g. sexual harassment)

Also, demand stimulators were identified.

Table 2: Demand stimulators for the Western Cape business events industry

Stimulator	Description	Suggested activity
Industry trade shows	Trade show for the business events industry, from both the demand and supply side to meet (e.g. IMEX America, IMEX Frankfurt and SITE events)	Use platform to promote destination, build new relationships and leverage existing relationships
Convention bureau	Promotion agency for the destination and seen as a trusted source of information	Development of a unique business events and destination brand for the Western Cape
Social media	Digital media heavily reliant on engagement	Leverage LinkedIn to market the destination and up-and-coming business events
Familiarisation trips (Fam trips)	Hosted buyer trips used to showcase the destination and product and support services offering	Develop a plan to reach and take key decision makers on fam trips to showcase the destination, product and support service offerings
Industry media	Niche publications (printed and digital) aimed at the business events industry (e.g. MeetingsNet.com and Successful Meetings)	Develop a marketing campaign to run in selected industry publications
Return on investment (ROI)	Meeting planners are increasingly focusing on ROI to deliver more for less	Provide innovation to help reduce costs but improve visitor experience and respond to the particular needs of a hybrid model
Economic impact	Economic benefits of business events (e.g. trade stimulation)	Educate stakeholders on the far-reaching economic benefits of business events
Business events brand and marketing	The Western Cape (led by Cape Town) has performed well in the past decade in its position as the preferred business events destination in Africa. However, with strong competition from new markets, a new approach is needed to maintain its leadership position	Shift marketing approach from product-centric to consumer-centric messaging and positioning
Industry positioning	Position the Western Cape's business events industry as a leader in Africa	Cape Town and Western Cape Convention Bureau to take the lead in facilitating an innovative positioning for the Western Cape business events industry, e.g. membership of GDS-Index

Latent forms of tourism

People travel for different purposes; it is these purposes that describe the various forms of tourism. The Western Cape is blessed with a depth and breadth of diversity, catering to many different forms of tourism. For Tourism Blueprint 2030, further investigation was done into three specific forms of tourism that stakeholders have identified as having significant potential in terms of return on investment, but are not currently reaching their full potential. These forms are (1) Cruise tourism, (2) Halal tourism and (3) Events and sports tourism.

Cruise tourism

Cruise tourism has been a booming segment in recent years. In 2018, it was recorded as the fastest-growing sector in the tourism industry, with an annual growth of 7.4% according to the Cruise Line International Association (CLIA, 2019), the world's largest cruise industry trade association representing 50+ cruise lines and more than 95% of global cruise capacity. Even Covid-19 has not dampened consumer interest and forward bookings are promising.

The opportunity for Cape Town and the Western Cape is to take advantage of the steadily growing demand from consumers and supply from cruise liner companies. The destination and the tourism value chain needs to understand how to leverage these additional tourists through onshore spending, shore excursions and tours and in-port spending from cruise companies themselves (i.e. purchase of certain food items, flowers and wine).

Other opportunities include local crew replacing foreign crew and ship maintenance, which would provide additional employment opportunities for workers such as shipbuilders, welders and electricians.

Halal tourism

The burgeoning growth of the global Muslim travel population signals an immense potential for Muslim travel-related products and services. According to the Mastercard-CrescentRating Global Muslim Travel Index 2019 (GMTI 2019), there were an estimated 140 million Muslim international travellers in 2018; this is projected to grow to 230 million by 2026. This market segment has been acknowledged as the 'third one billion' opportunity following the interest in Indian and Chinese billions (Janmohamed, 2016) and predicted to reach 30% of the world's travel population by 2050 (Pew Research Centre, 2017).

Sports and events tourism

Sport, events and tourism have a natural synergy and well-hosted events amplified by a clear tourism strategy can have a positive impact on the economy, the destination's image and the lives of the citizens of the Western Cape. During 2019/20, Wesgro supported 39 regional events made up of leisure and sporting activities. These activities created temporary work for 4007 people and spread over 230 000, mainly domestic tourists across all the districts. The economic impact, based on a daily spend of R910, was R208 million.

Table 3: Gaps and opportunities for events and sports tourism

Gap	Opportunity
Lack of financial and non-financial support to events. Financial and non-financial support includes the public sector resources (e.g. marketing and emergency services) to support event owners	Financial support: Build a dedicated events funding 'war chest' that financially supports from the jewel events to the incubator events, along with ring-fenced money to bid for mega events Funding application: Review the criteria across all public sector entities to ensure an enhanced event selection process Non-financial support: The provision of emergency services and dedicated public officials to support events
Knowledge exchange and capacity building	Grow the annual Events Incubation Conference Improve the Knowledge Exchange Programmes with event's organisers and the sharing of information Mentorship programme for event owners and planners
Events impact assessment (EIA) initiatives	Implement a standard EIA that can be used by any size or type of event
Western Cape provincial events forum	Leverage the work done by the forum and grow its role as the public sector interface with the sports and events industry in the Western Cape
Event infrastructure	Improve the curatorship of strategic event infrastructure
Marketing	Find innovative and effective ways to market events that (a) increase attendance and (b) position the destination

As tourism is recognised as a provincial strategic priority and as embedded in the Integrated Event Strategy (IES), events are one of the key contributors to the tourism industry. The IES will complement Tourism Blueprint 2030 and will improve the Western Cape Government's work to maintain the status of the 'Cape of Great Events'.

International market potential

The potential international markets for the Western Cape have been segmented as follows:

- Africa
- Asia Pacific Region
- Europe
- Middle East
- Americas

A market potential matrix was developed to assist in prioritising market selection. Selecting the right markets will go far in ensuring that objectives are reached. The strategic approach is to concentrate efforts on a few markets that will offer a high return on investment for the Western Cape tourism economy. Each geographic segment was assessed based on five indicators, including current volume and value, accessibility, attractiveness, barriers and trends.

The ability to grow demand and attract tourists to the Western Cape is heavily reliant on a tourist's willingness to travel to Africa based on their perceptions, word-of-mouth influences or previous experiences. The Western Cape is well-positioned to unlock some of these barriers, namely accessibility, affordability and iconography, noting that there remain concerns around safety and security. Although this section provides a review of potential markets within the selected geographic areas and

provides some assessment regarding the potential markets, further analysis of these markets will be required, along with industry input and insights to make a final market selection.

Lastly, in light of the economic impact of Covid-19, marketing budgets will remain constrained in the foreseeable future, which requires far greater alignment between marketing initiatives across the various spheres.

Domestic demand

One of the objectives of Tourism Blueprint 2030 is to ignite domestic tourism for the Western Cape. According to the World Travel and Tourism Council (WTTC), more than seven out of every 10 dollars spent on tourism in a destination are disbursed by the domestic market. The money spent by the local market is, therefore, a more important source of tourism revenue than that of an international visitor.

In South Africa the inverse takes place, and in 2019, total domestic tourist spend was R43.9 billion versus real international spend of R81.2 billion. Therefore, for every Rand spent by a local visitor, two Rands is spent by a foreign visitor. Despite these figures, domestic tourism is an important source market for value, volume and geographic spread, and it has various benefits including lessening the impact of seasonality, being an igniter of development and investment and acting as a shock absorber to unforeseen global crises. The two main barriers to domestic travel are budget constraints and the fact that South Africans don't see a need to travel.

The opportunity for the Western Cape is for it to develop a tourism offering that resonates with the traveller in terms of their primary purpose of travel at an affordable price and offers a value-for-money experience. The Western Cape will focus on the two economic hubs, Gauteng and Western Cape, as the starting point in terms of marketing and promotion.

Legislative and partnership review

A critical component of Tourism Blueprint 2030 is legislation and partnerships. An assessment and review of the regulatory environment and institutional relationships in the tourism ecosystem was undertaken. Recommendations include:

- Place collaboration at the core of the Tourism Blueprint 2030
- The coordination of tourism should be located at the district level
- The RTO should be an NPO funded by the district municipality with LTO representation
- The LTO model should be legislatively formalised through the drafting of an Act
- The relationship between tourism and the broader ecosystem needs to enable increased benefit to communities from tourism activities to address the current separation of the visitor experience and the local experience, and to allow the development of shared narratives about the place
- The relationship between tourism entities and municipalities should be structured so that roles, processes and aims are clearly defined

The new approach to partnering that has been proposed in Tourism Blueprint 2030 will work at strengthening the links within the tourism industry and improving the overall industry's performance.

Action plan

Chapter 11 contains a summary of strategic priorities and opportunities. Chapter 11 consists of an action plan which sets out the key actions which will guide the implementation of Tourism Blueprint 2030.

The action plan will be updated annually in collaboration with all partners.

1 Introduction

1.1 Introduction

Tourism Blueprint 2030, the Western Cape's destination management and marketing framework, aims to build a sustainable visitor economy that has a positive impact on job creation, local investment, infrastructure and citizen pride in the province.

1.2 Purpose of the plan

The purpose of Tourism Blueprint 2030, which has been co-created by a broad range of tourism stakeholders, is to provide a roadmap for the region's long-term tourism vision, goals, objectives, policies and potential investment opportunities over the next 10 years. In light of Covid-19, it is even more important for the Western Cape to have a coherent vision and strategy to drive recovery and growth.

The plan will align with global and national policy directives concerning the United Nations Sustainable Development Goals as shown in Figure 1, as well as the National Development Plan including the National Tourism Sector Strategy.

Tourism Blueprint 2030 aims to:

- Renew focus on **domestic markets**
- Improve the **ease of doing business** for tourism businesses
- Raise the **global profile** of Destination Western Cape
- Identify and develop tourism **infrastructure**
- Drive **geographic spread** of tourism benefits throughout the province
- Grow **visitor numbers** and yield
- Prioritise tourism **development growth** within each district across the province
- Improve **customer experiences** (quality and service excellence)
- Develop **industry partnership** programmes through action platforms

1.3 Vision

Tourism Blueprint 2030, led by the Western Cape government, executed **with the industry** and **driven by society,** aims to boldly build a **thriving visitor economy** that increases its contribution to the Western Cape while creating a **sustainable and competitive destination** for years to come.

Figure 1: United Nations Sustainable Development Goals

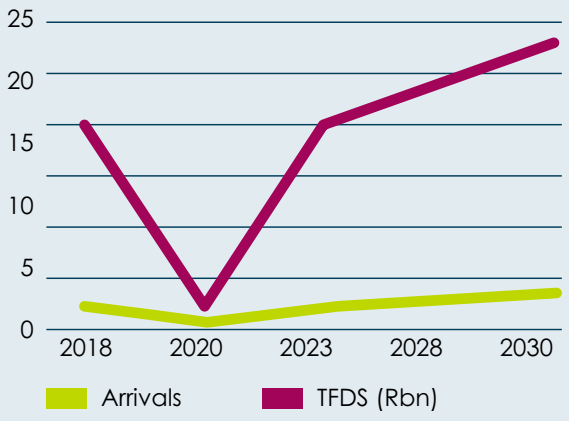
Source: United Nations, 2019

1.4 Objectives

Tourism Blueprint 2030's objective is to increase international arrivals over the next 10 years to 3m with total foreign direct spend (TFDS) to reach R23.7bn as shown in Figure 2.

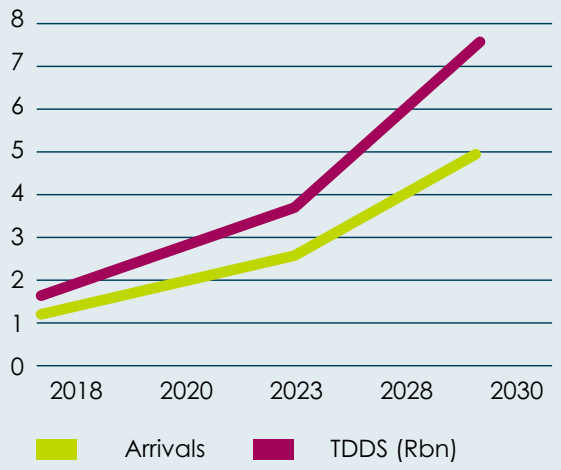
Tourism Blueprint 2030 also aims to increase domestic trips taken to 5m with a total domestic direct spend (TDDS) reaching R7.5bn as shown in Figure 3.

Figure 2: Western Cape international arrivals and TFDS targets



Source: DEDAT, 2021

Figure 3: Domestic trips taken and value targets for Western Cape



Source: DEDAT, 2021

Tourism Blueprint 2030 has adjusted the targets to accommodate the pandemic's recovery period, which has been estimated to take up to 2025. A baseline for recovery was used in relation to the 2018 performance for the province for both domestic and international arrivals and spend. It is estimated that the recovery period for domestic trips will be shorter than international arrivals post the pandemic.

Due to tourism's resilient nature, it remains a reliable economic sector and one that can be a robust job creator, especially for developing countries such as South Africa.

The opportunity exists for the Western Cape to take advantage of this tourism growth and increase visitor numbers and geographic spread throughout the year.

1.5 The global context

On a global level (see Figure 4), tourism continues to outpace the world economy with 2019 showing a 4% increase on the previous year's 1.5 billion international arrivals (UNWTO, 2020). While Covid-19 has been a major shock to the global industry, past experience has highlighted the resilient nature of the industry.

Figure 4: 2019 Global tourism results

1.5 billion

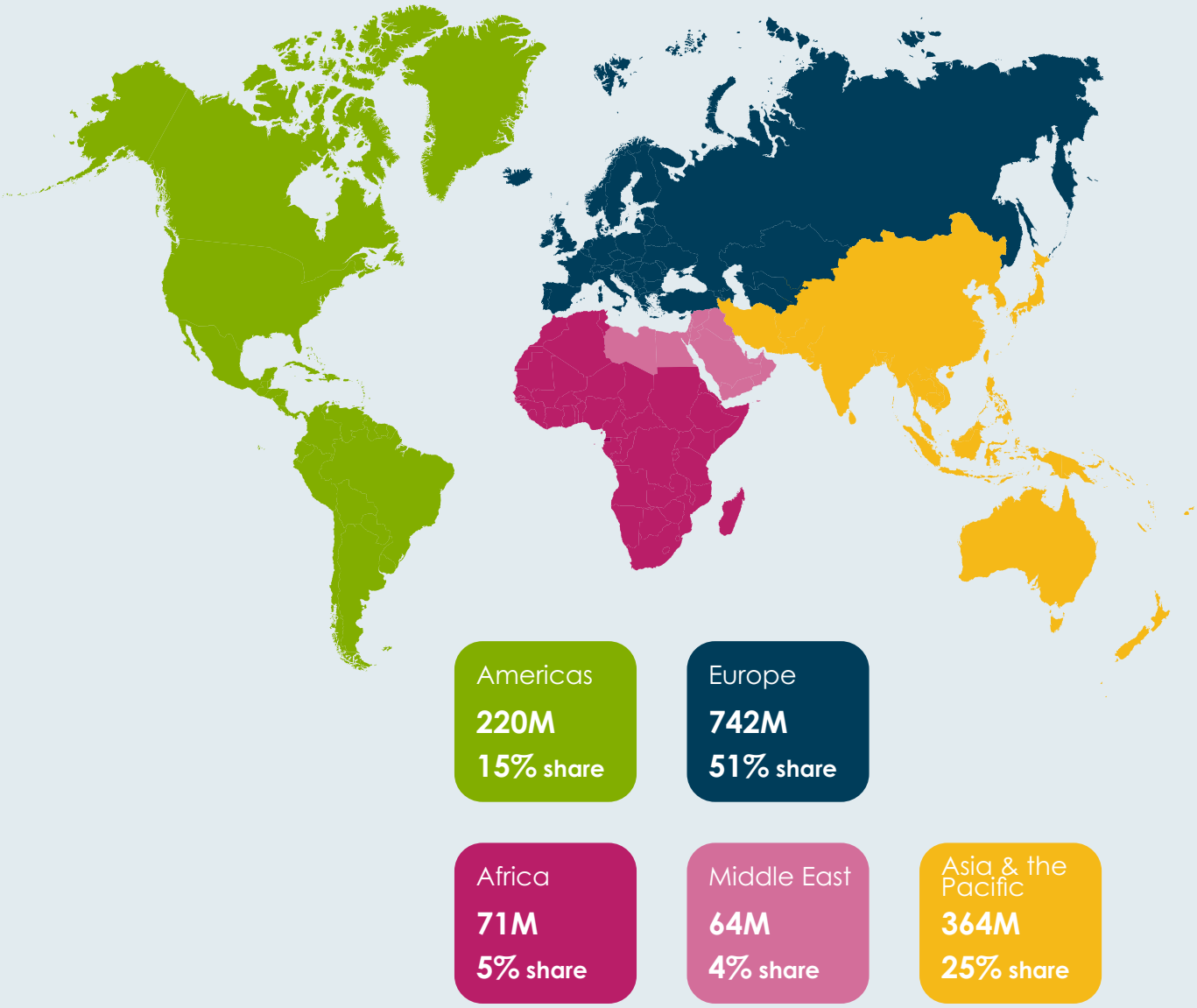
International tourist arrivals

+4% change

from 2018

4 million

Arrivals per day



Source: UNWTO, 2020

1.6 Barriers to growth

There will need to be a strong focus on the removal of significant barriers impacting tourism growth to achieve the targets set and take advantage of the global growth of tourism. These barriers not only affect the Western Cape but South Africa as a whole.

Air access **Visa regime** **Safety and security** **Technology**

1.6.1 Air access

> "Picture this. It is eight times more expensive to fly from South Africa to Botswana per kilometer than it is to fly from South Africa to New York despite the two countries being in the same continent."
> Bob Koigi, contributing editor
> www.fairplanet.org

Africa, including the South African aviation sector, is synonymous with expensive fares, poor quality of services, long trips, poor connectivity and antiquated infrastructure. The result is that, globally, Africa remains the weakest airline region. This vulnerable position all stems from its protectionist policies that restrict air service markets and territories. (www.fairplanet.org)

Together the Western Cape Government and industry need to work with the national government to help bring to fruition the Single African Air Transport Market (SAATM) treaty.

The opening of the African skies will increase the number of frequent flights to South Africa and the Western Cape, resulting in lower fares. This reduction in the cost of flights will see a growth in tourists and cargo, ultimately growing not only tourism but many other sectors and creating more jobs. However, the industry must take into consideration the challenges posed by Covid-19 to global and domestic airlines.

1.6.2. Visa regime

The tedious process and cost of obtaining a visa to South Africa is often a deterrent for the traveller wanting to come here. This process, plus the sometimes unpredictable approach to the change in regulations (e.g. the introduction of the unabridged birth certificate (UBC) in 2015), has been shown to have a severe impact on the tourism industry. Research conducted by BDO estimated that, conservatively speaking, South Africa has lost about R10 billion per annum since 2015 due to the UBC requirement.

Another example of this was the reciprocal visa imposed for New Zealand in 2016. South Africa experienced close to a 40% drop in arrivals from New Zealand from 2016 (22 400) to 2019 (13 770) (Source: South African Tourism, 2020). Continued pressure needs to be placed on the national government to implement the 'online visa' and review existing regulations that create unnecessary barriers (e.g. review of regulations impacting the swallow market) and look at effective ways of effectively implementing e-visas and visas on arrival.

1.6.3. Safety and security

Continued safety and security concerns by foreigners are hampering tourism growth in South Africa and the Western Cape. This negative perception has also been heightened by years of sporadic xenophobic attacks on foreigners living here.

Actions such as continued visible policing in hot spots will assist in deterring crime and creating a safer space for all, citizens and tourists. In response to the Covid-19 pandemic, the province's work around improving visitor safety has been broadened to consider the multidimensional nature of safety, security, health and wellbeing.

1.6.4 Digital disruption

Although technology is an enabler, its constant change and disruption can act as a barrier to small businesses that are unable to adapt quickly to changes. Therefore, new entrants to the market are guaranteed. Disruption will become the norm in the tourism technology space.

The rapid pace of change has only accelerated due to Covid-19.

1.7 Methodology and process

Phase 1: Planning

The planning and development of Tourism Blueprint 2030 started in February 2019. An in-depth review of all relevant strategies, research, plans, and regulations took place.

Phase 2: Establishment of advisory committee

The establishment of a six-member tourism advisory committee, comprising both local and international tourism stakeholders, brought multiple sets of skills and global expertise to the development of Tourism Blueprint 2030. Throughout the development of the plan, intense and robust engagement took place starting with an initial brainstorm in Cape Town in 2019 to the completion of the project in March 2020.

Phase 3: Orientation

Workshops with municipalities, district and local tourism offices, and industry helped the team better understand the status quo and where potential challenges lie for the next five years. It also gave the team good insight into what had been successful regarding development, partnerships and promotion over the past five years.

Another set of workshops was held with the municipalities in selected districts to get a better understanding of the current tourism regulatory and institutional arrangements and where the challenges may lie. This provided some insight for developing a new partnership model.

As part of the process, an engagement was convened with crucial tourism industry stakeholders to ensure their input into Tourism Blueprint 2030. Extensive discussions around critical areas took place, focusing on tourism investment prioritisation, relationships and partnerships, destination positioning and promotion as well as new product offerings. The team received a wealth of suggested improvements for each area through these engagements.

Phase 4: Destination potential assessment

An in-depth audit of the top attractions per district assisted in determining the attraction value of each.

Phase 5: Market potential assessment

Studies reviewed continental profiles to help determine which markets offered the most feasible opportunity to attract tourists and deliver a return on investment. The review of forces and trends supported this global view and assisted the team in the understanding of how these developments and changes may affect tourism in the future.

Phase 6: Action plan development

The last part of the study was the development of strategies, goals, objectives and action plans based on the opportunities found and barriers identified. These plans were reviewed and vetted by industry associations and government parties during February 2020.

Phase 7: Launch

Tourism Blueprint 2030 is set to be launched in May 2021 in Cape Town by MEC David Maynier, Western Cape Minister of Finance and Economic Opportunities.

The success of this plan is dependent on the willingness of appropriate lead agencies, organisations and industry to implement the action plans. This effort may require the development or identification of additional strategies, detailed implementation plans, and funding sources to help achieve the objectives and realise the vision. The flexibility of the plan and the understanding that the environment we operate in is dynamic, allows for this.

1.8 Tourism Blueprint 2030 chapter outline

This report consists of 11 sections as listed below.

1

Introduction

The introductory section puts forward the purpose, vision and objectives of Tourism Blueprint 2030 in the context of the global tourism environment. The section also identifies the most significant overarching barriers impacting tourism growth for the Western Cape.

2

The Western Cape today

Section two gives an overview of the Western Cape and provides context to the current tourism environment, what works, what does not and suggested improvements. These outcomes are based on two industry workshops and one-on-one interviews held. The section also includes an overview of the existing legislative structure, forms of tourism in the Western Cape, core tourism components for the province, and insight into the value-chain and details the current tourism performance.

3

Forces and trends

This third section focuses on forces that are impacting the world as a whole and the trends that emerge when different forces intersect.

4

Focus Area 1 | District assessment

In this section, we review local tourism attractions and experiences and online conversations to look for future opportunities and existing gaps.

5

Focus Area 2 | Business events (MICE) assessment

Meetings, incentive trips, conferences/congresses and trade exhibitions, commonly referred to as MICE, business tourism or business events, is an important form of tourism for the Western Cape. It presents opportunities not only for increased arrival of high-value tourists but also the ability to link with trade and investment and build the identity of the Western Cape both locally and internationally.

6

Focus Area 3 | Latent forms of tourism

A review of the Western Cape's potential to develop cruise, events and Halal tourism forms part of this section. It provides insight into trends impacting these latent forms of tourism, barriers to growth and possible sources of demand.

7

Focus Area 4 | International market potential

A review of the top tourism markets within Africa, the Americas, Asia-Pacific, Europe and the Middle East forms part of this section.

8

Focus Area 5 | Domestic market potential

Domestic tourism can combat seasonality, increase the spread of tourists to less-visited rural areas and help with capacity management. This section also reviews the current domestic market, the domestic market's propensity to travel and the barriers to growth.

9

Focus Area 6 | Legislative and partnership models

This section reviews the current legislative and partnership structure of tourism in South Africa, and the Western Cape. There is a proposed 'go-to' scenario provided upon which the development of policy may occur.

10

Priorities and growth opportunities

Priorities and growth opportunities summarise all the possibilities put forward throughout Tourism Blueprint 2030 and how they can impact the tourism economy of the Western Cape and help meet the goals.

11

Action plan matrix

The final section covers the outcome of the last industry workshop where growth opportunities were discussed and focus areas agreed upon. Each focus area will detail participating entities, timelines, funding requirements and measurements of success.

2 The Western Cape today

2.1 Introduction

The Western Cape province, situated at the southern extremity of the African continent, is bordered by the Indian and Atlantic Oceans (see Figure 5). The province is 129 449km^2 in size which is roughly the same size as England. It is home to just over 6.8 million people which is approximately 11% of South Africa's total population.

The Western Cape is globally renowned for its natural beauty, superior hospitality, award-winning wine and food, and heart-stopping adventure – making it one of Africa's most celebrated destinations to live, work and visit.

With a climate that is typically like the Mediterranean, the Western Cape experiences warm, dry summers and mild, moist winters with low summer rainfall. The region's summer temperatures range from 22 – 25 degrees Celsius and winter temperatures range from 10 – 13 degrees Celsius. This makes the Western Cape the ideal all-year-round holiday destination.

There are six districts in the Western Cape, each with its own unique tourism offerings (see Figure 6).

1. Cape Town Metropolitan Municipality
2. West Coast District Municipality
3. Central Karoo District Municipality
4. Overberg District Municipality
5. Cape Winelands District Municipality
6. Garden Route District Municipality

An assessment of the potential of each district is featured in Section 4 | District assessment.

Figure 5: Africa, South Africa and the Western Cape

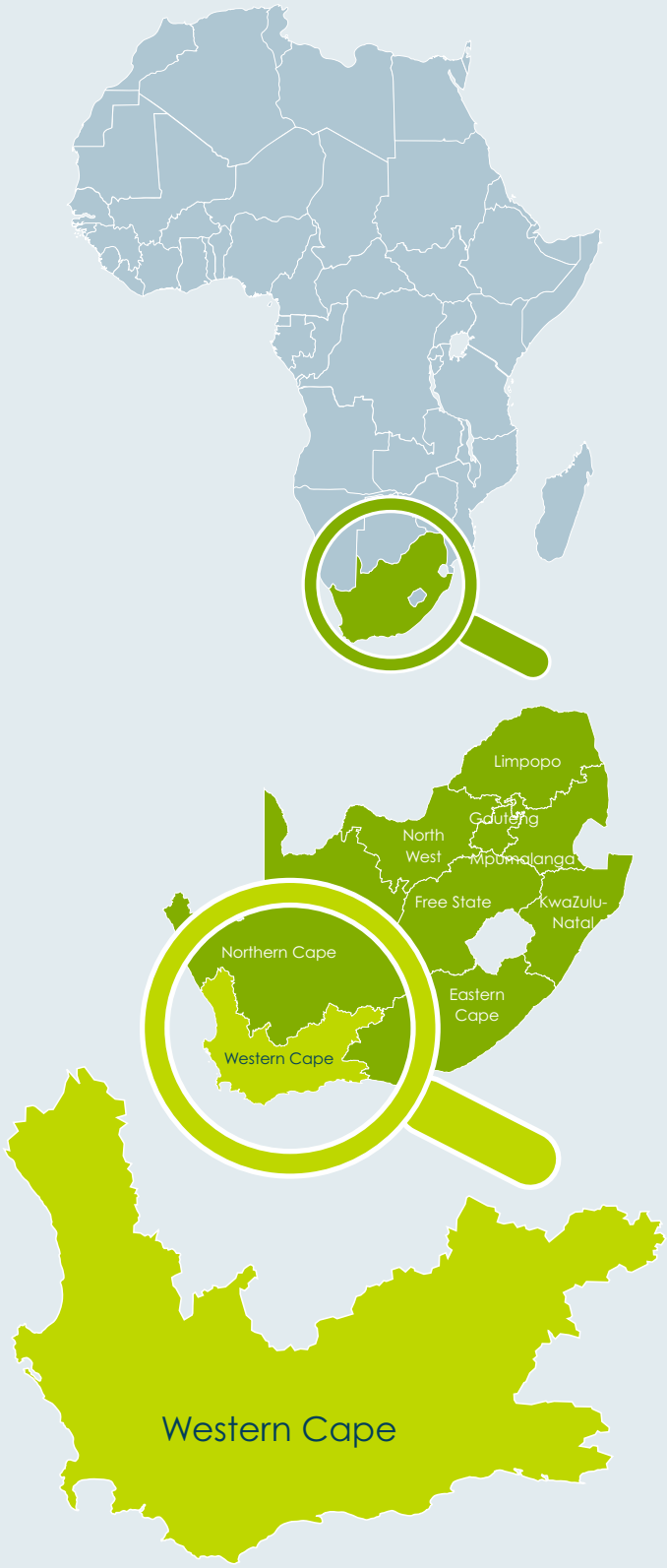


Figure 6: The Western Cape

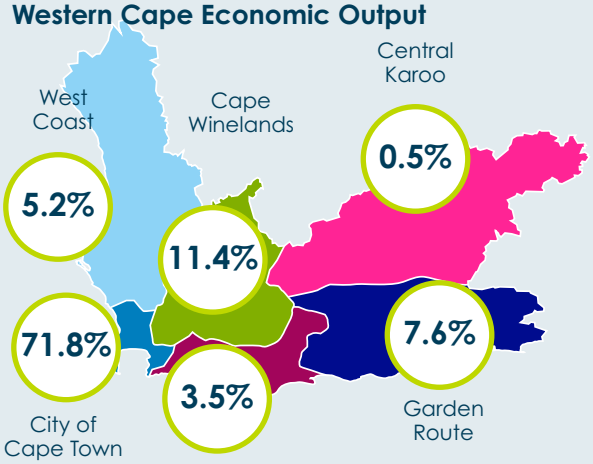
3rd
most populated province

estimated
6.8million
inhabitants

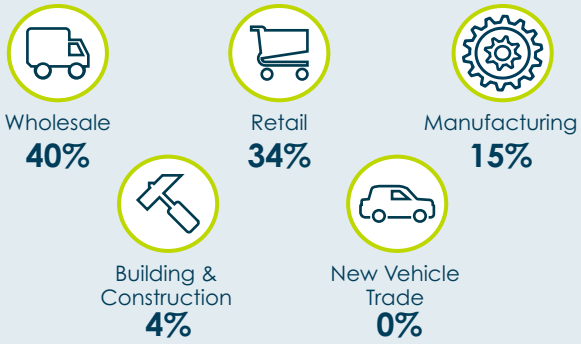
Figure 7: Development of the Western Cape economy

Economic growth per sector (2010–2019)

Western Cape Economic Output



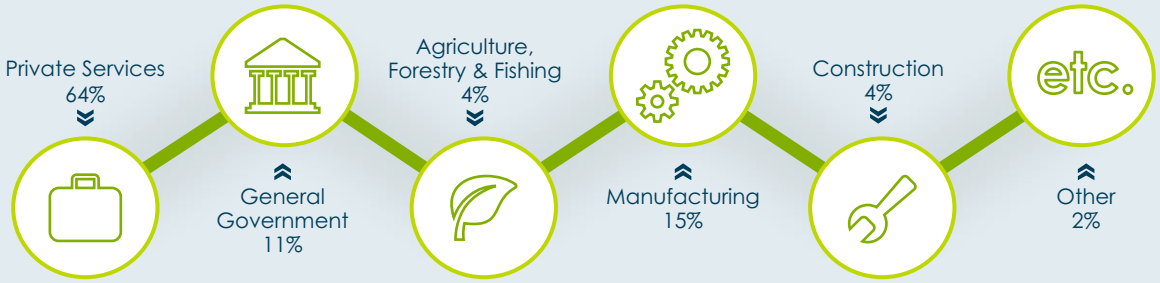
Business confidence in sectors (2019–2020Q2)



These sectors were responsible for 67% of the net jobs created. Forecast suggests that they will remain the biggest drivers for employment in the Western Cape (2019–2020 Q2)

Electricity, Gas & Water
GDPR: R 7 068 million

Structure of the Western Cape Economy – GDPR Contribution 2019



Biggest Agricultural Sub-sectors

Pome Fruit
Turnover: Rm 6 639
Jobs: 35 724

Stone Fruit
Turnover: Rm 2 165
Jobs: 19 233

Wine Grapes
Turnover: Rm 5 020
Jobs: 39 081

Top Agricultural Exports 2019

Table Grapes
WC Contribution: 84%

Bottled Wine
WC Contribution: 87%

Oranges
WC Contribution: 20%

Top Import Markets

China
Share: 20.2%
Growth: 1.7%

Nigeria
Share: 19.1%
Growth: 40.0%

Saudi Arabia
Share: 16.3%
Growth: -35.5%

Top Export Markets

Namibia
Share: 18.4%
Growth: 9.9%

United Kingdom
Share: 13.3%
Growth: -5.3%

United States
Share: 13.1%
Growth: -0.6%

Source: PERO, 2020

2.2 Legislative structure of tourism

The Western Cape tourism industry operates within the context of several national and provincial acts and policies.

1. The Constitution lists local tourism as a local government competence in Schedule 4B. All municipalities, therefore, have a constitutional mandate to promote, develop and administer tourism in their area of jurisdiction.

2. The Municipal Systems Act of 2000, Section 78(3) enables municipalities to establish and fund external mechanisms such as regional tourism offices (RTOs).

3. The Tourism Act of 1993 outlines the tourism mandate of local municipalities where tourism is a specific local economic development directive. The Tourism Amendment Act (1996) clarifies the relationship between the provincial and central government to tourism. The Tourism Second Amendment Act (2000) provides for the registration of tourist guides in an attempt to regulate the industry, set standards and develop a code of conduct aimed at improving tourism services in South Africa. The Tourism Act 3 of 2014 provides for the development and promotion of sustainable tourism for the benefit of the Republic, its residents and its visitors; to provide for the continued existence of the South African Tourism Board; to provide for the establishment of the Tourism Grading Council; to regulate the tourist guide profession.

4. The White Paper on the Development and Promotion of Tourism and the Tourism Act stipulate that tourism is led by the government, driven by the private sector and based in local communities. The role of local government is defined as: to promote and financially support the establishment of local publicity associations/ community tourism and marketing organisations to facilitate, market, coordinate and administer tourism initiatives.

5. The Western Cape Investment and Trade Promotion Agency Amendment Act (2013) extended the powers and functions of Wesgro to include tourism promotion, to repeal the Western Cape Tourism Act (2004) and to disestablish the existing Destination Marketing Organisation (DMO).

6. The National Framework for Local Economic Development (LED) prioritises the tourism sector as one of the sectors to promote local economic diversification.

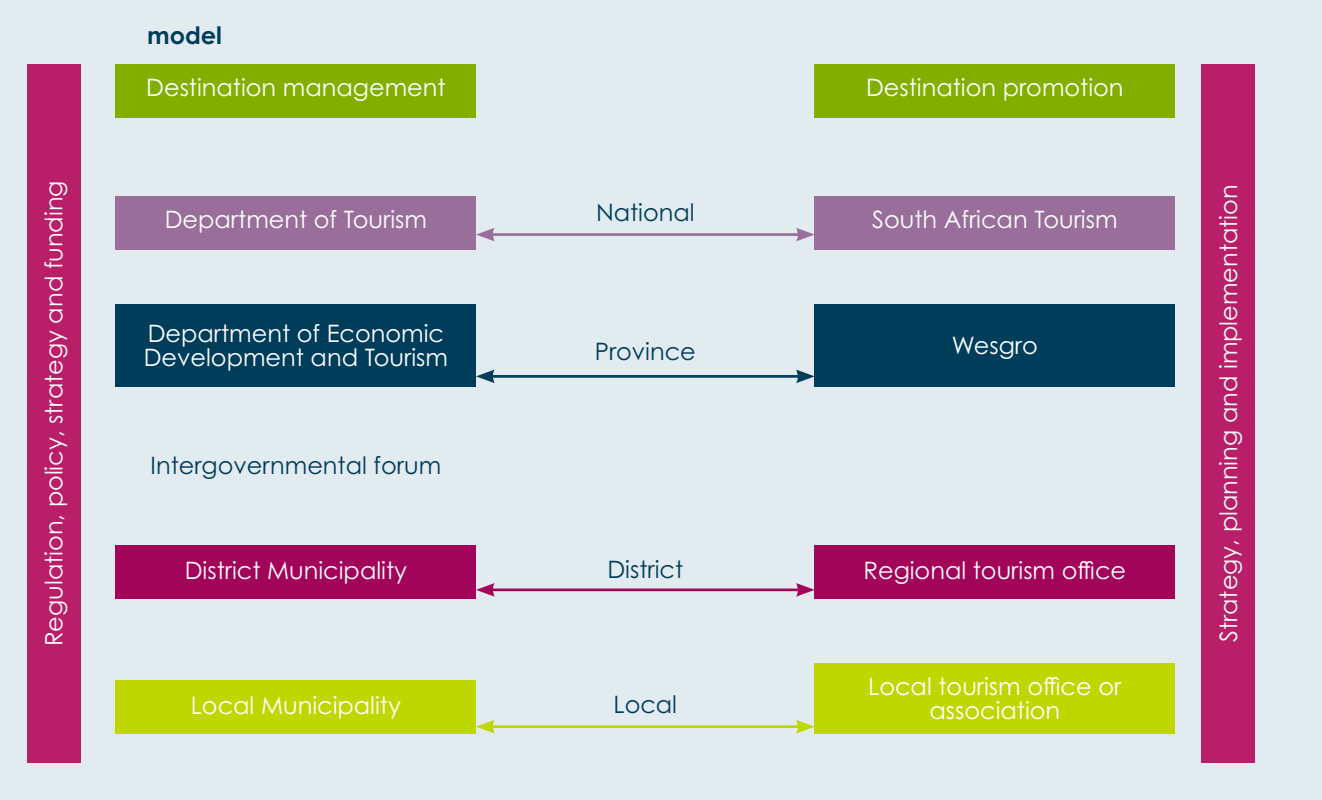
7. The Tourism Black Economic Empowerment (BEE) Charter seeks to advance the objectives of the Broad-based Black Economic Empowerment Act no. 53 of 2003 (BEE Act). The Charter is a commitment by all stakeholders in the sector to ensure tourism in South Africa is more globally competitive and to transform the industry by empowering previously disadvantaged people and communities in the tourism sector. The Charter encourages empowerment targets to be achieved through ownership, strategic management, employment equity, skills development, preferential procurement, enterprise, and social development.

This legislative framework provides an array of mandates and directives and is further covered in Section 9 | Legislative and partnership models.

2.2.1 Current partnering model

Currently, the relationship between various levels of government is shown in Figure 8 below. However, there is a lack of clarity regarding this model and specific roles and responsibilities within the tourism ecosystem. This will be outlined in Section 9 | Legislative and partnership models.

Figure 8: The Western Cape tourism partnership model



2.3 Forms of tourism within the Western Cape

People travel for different purposes. It is these purposes that describe the various forms of tourism. The Western Cape is blessed with a range of attractions, routes, experiences and venues, unseen anywhere else in the world. The Western Cape has a tourism ecosystem which supports many different forms of tourism. Each form of tourism has an activity associated with it.

The two primary forms of tourism in the Western Cape are (1) business events and (2) leisure tourism. Table 4 below includes a list of Western Cape forms of tourism. This list is not exhaustive but highlights the majority of tourism forms and activities in the Western Cape.

Table 4: Western Cape forms of tourism

Forms of Tourism	Examples of activities undertaken
Leisure tourism Leisure tourism comprises 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 (UNWTO).	• Family holiday • Nature (parks, reserves and wildlife sanctuaries) • Sight-seeing
Business tourism Business tourism comprises 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 (UNWTO).	• Business travel • Meetings • Incentives • Conferences • Exhibitions (trade and consumer) • Bleisure (business and leisure travel)
Adventure tourism The Adventure Travel Trade Association (ATTA) defines adventure tourism as a **trip** that includes at least two of the following three elements – physical activity, natural environment, and cultural immersion.	• Cycling tours • Hiking • Surfing • Kiteboarding • Rock climbing • Trail running • Bungee jumping • Scuba diving • Zip-lining • Paragliding • Sandboarding
Cultural tourism A type of tourism activity in which the visitor's essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination. These attractions/ products relate to a set of distinctive material, intellectual, spiritual and emotional features of a society that encompass arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions (UNWTO).	• Architectural and archaeological sites • Historical and heritage sites, monuments, and landmarks • Museums and exhibitions
Ecotourism Tourism that has minimal impact on fragile natural environments and which focuses on providing nature-based experiences (UNWTO).	• Flora and fauna experiences • Hiking • River rafting • Bird and whale watching • Canopy tours • Horse riding
Food and wine tourism or gastronomy tourism Gastronomy Tourism is a type of **tourism** activity characterized by the visitor's experience linked with **food and wine** and related products and activities while travelling.	• Wine routes • Food routes
Health and wellness tourism • Medical tourism • Wellness tourism Health tourism covers those types of tourism which have, as a primary motivation, the contribution to physical, mental and/or spiritual **health** through **medical** and wellness-based activities (UNWTO et al).	• Medical procedures • Spas • Retreats

Cruise tourism Cruise tourism can be defined as a luxurious, all-inclusive way of travelling usually for at least 48 hours following a specific itinerary and where the cruise ship calls on a variety of ports and connected cities or hinterland. It is a tourism product that offers and combines attractions, activities, access, accommodation, and amenities (CBI).	• Cruises
Sports or events tourism Sport and evets tourism includes travel away from one's primary residence to participate in sports activity for recreation or competition purposes, travel to observe sport or event at grassroot or elite level, and travel to visit a sports attraction such as a sports museum (Neirotti, 2003).	• Spectator or mega events • Participants in all types and sizes of events • School groups and school sports events
LGBTQ Tourism Refers to the development and marketing of tourism products and services to the lesbian, gay, bisexual, transgender and queer community.	• Pride festivals
Religious tourism Is a type of tourism where people travel individually or in groups for pilgrimage, missionary or leisure purposes.	• Visit religious venues, mosques and temples • Church services and church groups • Faith-based camps • Missionary travel • Pilgrimages
Halal tourism Activities within Sharia law e.g. separate men's and women's swimming pools and spas, hotels that accommodate prayer facilities, no alcohol in mini-bar fridges.	• Leisure • Adventure
Film tourism Film tourism can be defined as a branch of cultural tourism and refers to the growing interest in and demand for locations which became popular due to their appearance in films and television series (SpringerLink).	• Famous movie site tours
City breaks A short leisure trip to one city or town (1 to 3 nights).	• High quality gastronomy experiences • Cultural/historical offerings/tours
Shopping tourism Regarded as a form of tourism focused on the acquisition of products and services in the visited place (there is no globally accepted definition, www.worldshoppingtourism.com).	• High-end international brands • National/local brands • Crafts
Edu-tourism Recreational travel undertaken solely or partially for the purpose of study, self-improvement or intellectual stimulation or travel to attend schools, universities, or other educational opportunities (www.travel-industry-dictionary.com › edutourism)	• Tertiary education • Graduate business school courses • Language schools • Specialist training (e.g. Silwood School of Cookery)

2.4 The Western Cape's core tourism components

The Western Cape has identified five components that will assist in ensuring a sustainable tourism destination that flourishes. These components are:

1. **Tourism infrastructure**: Infrastructure comprises essential services, buildings and service institutions.

2. **Tourism product development:** Product development focuses on the development and provision of experiences, services and infrastructure that exceed customer expectations.

3. **Destination marketing:** This is a form of marketing in which the destination is promoted to a potential visitor to increase the number of trips taken and revenue per trip.

4. **Visitor services:** The business of providing services to tourists, for example, hotels and restaurants, safety and security, banking, visitor information centres, etc.

5. **Institutional arrangement and regulation:** This component governs the ecosystem concerning policy, as well as providing the model for clustering activities, and roles and responsibilities from both the private and public sector roleplayers.

These components are grouped into two categories, namely a) destination marketing and b) destination management and product development.

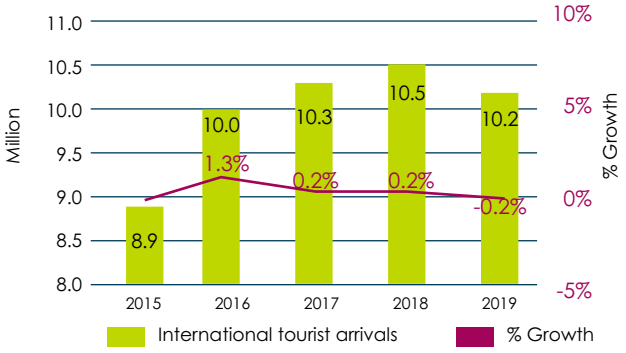
2.5 South African tourism performance

International tourists' arrivals to South Africa in 2019 contracted by only 2.3% to 10.2 million as shown in Figure 9. South Africa offers excellent value for money for the international visitor, and the retail sector benefited from a R22 billion injection from tourism spending.

On average international tourists stayed 11.4 nights to enjoy the country's wide range of offerings from safari, beaches, city breaks, world heritage sites, scenic beauty, active adventure and culture.

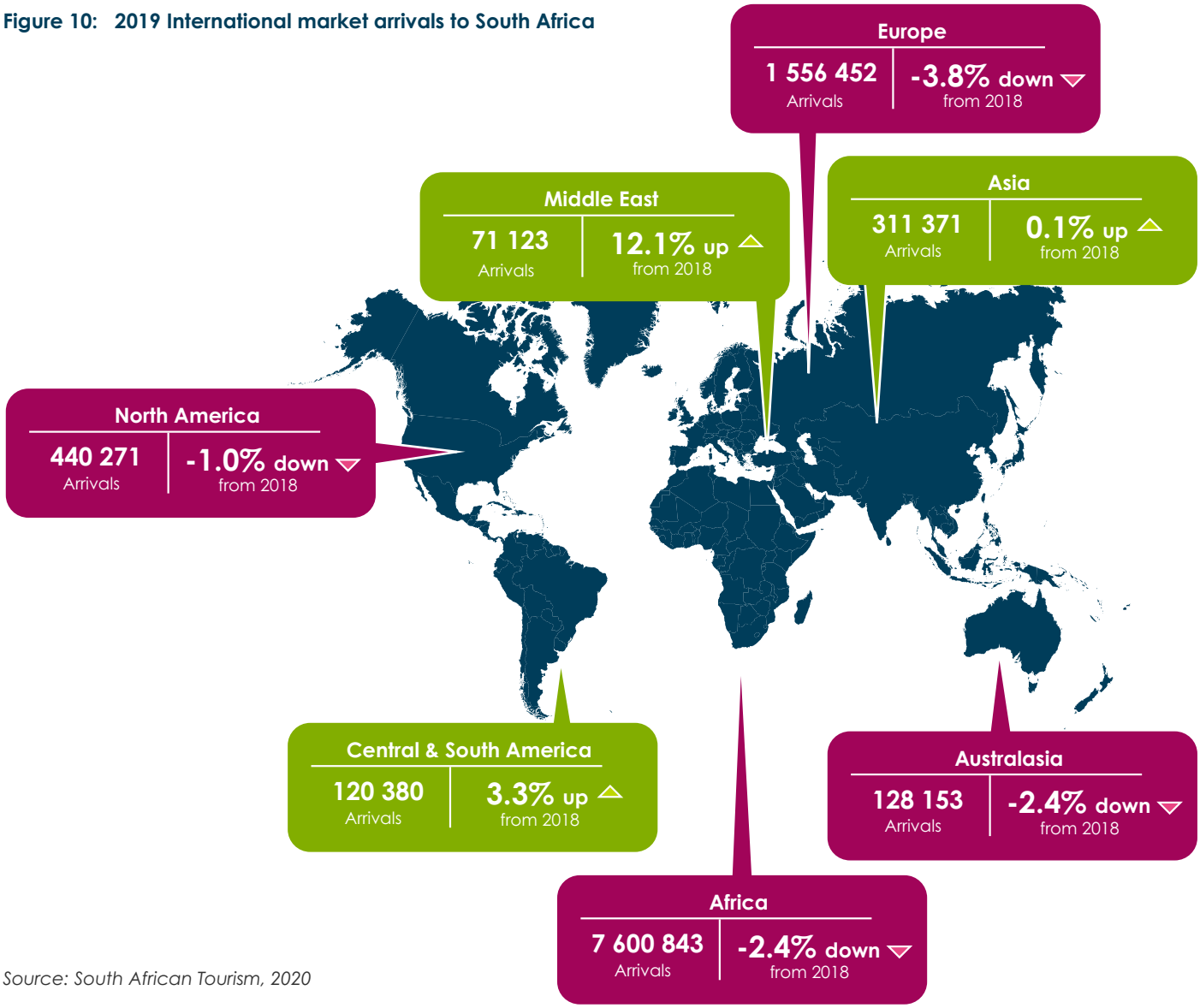
During 2019 arrivals from all markets declined, except for the Middle East, Asia and South America as shown in Figure 10.

Figure 9: 2019 International Arrivals to South Africa



South African Tourism, 2020

Figure 10: 2019 International market arrivals to South Africa



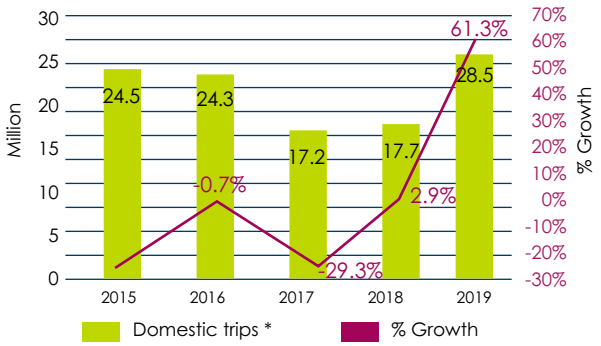
Source: South African Tourism, 2020

Domestic trips taken in South Africa increased by 61.3% to 28.5 million as shown in Figure 11, with 52.7% (15 million) people travelling to visit family and friends, followed by 24.8% travelling for leisure purposes followed by 5.2% travelling for religious purposes.

On average a trip lasted 3.9 nights and contributed R26.4 billion to the economy. With just over 8.4 million tourists, Gauteng is the largest source or origin province in terms of domestic trips taken as shown in Figure 12.

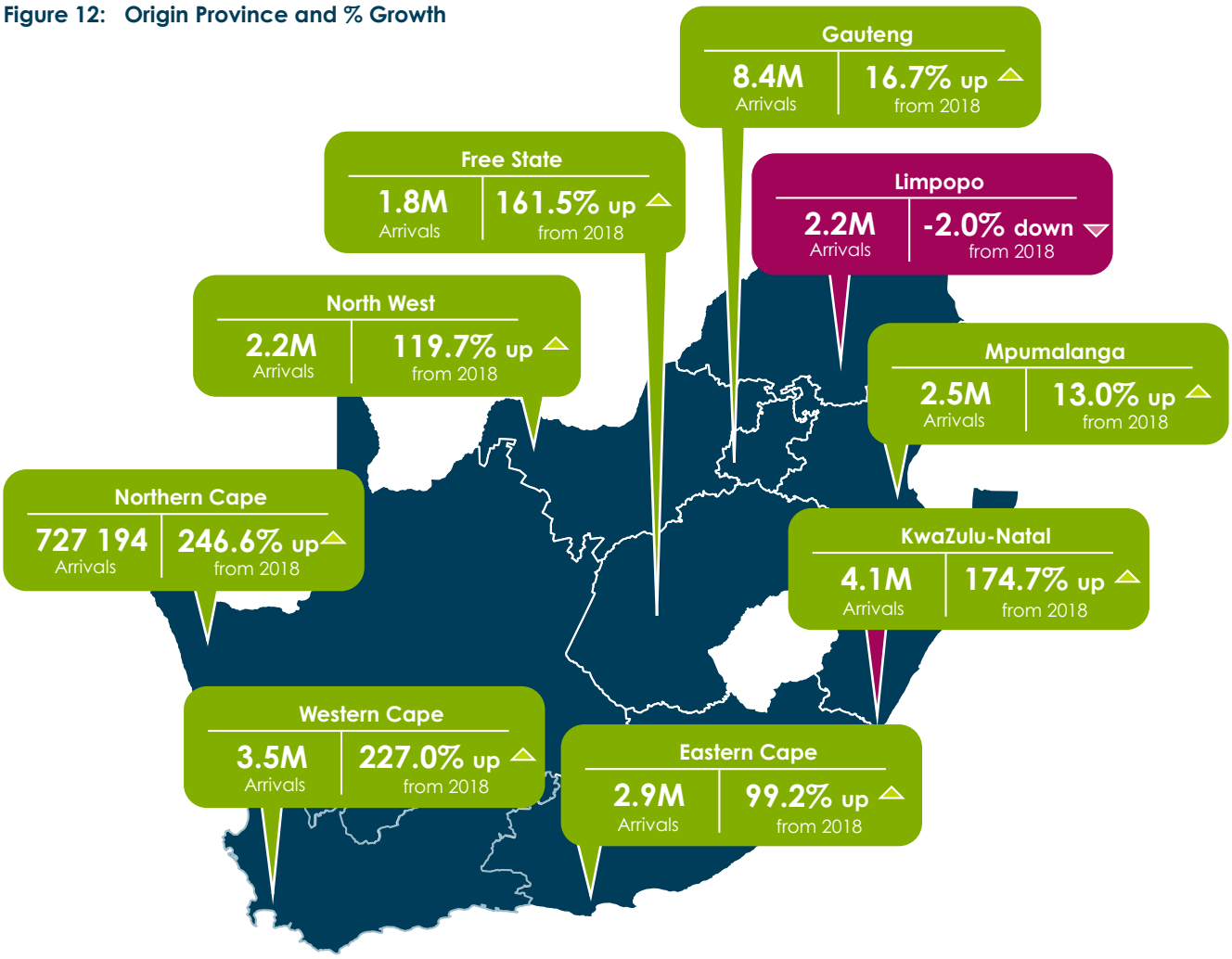
Although Visiting Friends and Family (VFR) was the most prominent reason for travel, holiday travel grew exponentially, up by 170.6% year-on-year to reach 1.7 million tourists in 2019.

Figure 11: Volume and % growth of domestic trips taken in South Africa to visit family and friends



**Domestic trips = Domestic traveller x trips per traveller*
Source: South African Tourism, 2020

Figure 12: Origin Province and % Growth

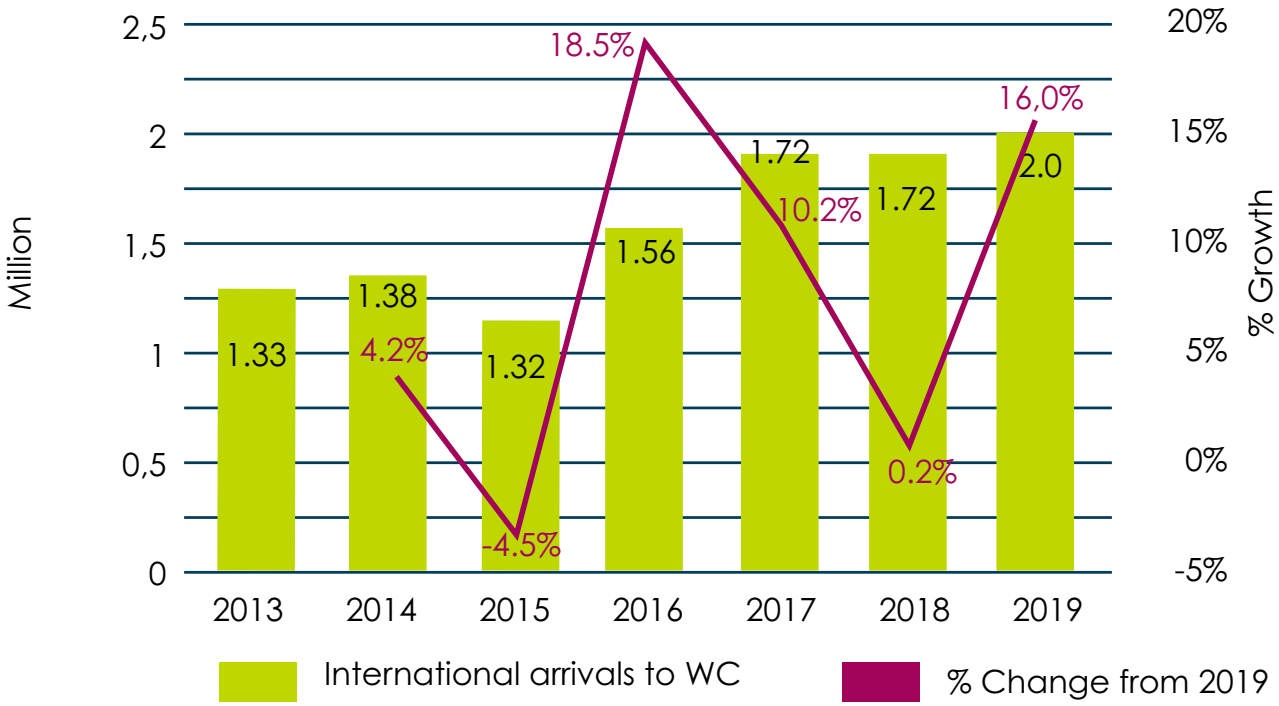


Source: South African Tourism, 2020

2.6 The Western Cape tourism performance

In 2019 the Western Cape welcomed 2 million international arrivals, a 16.0% increase from 2018, as shown in Figure 13. These arrivals accounted for 19.6% of all international arrivals to South Africa and brought in R18.6 billion total foreign direct spend (TFDS) to the Western Cape.

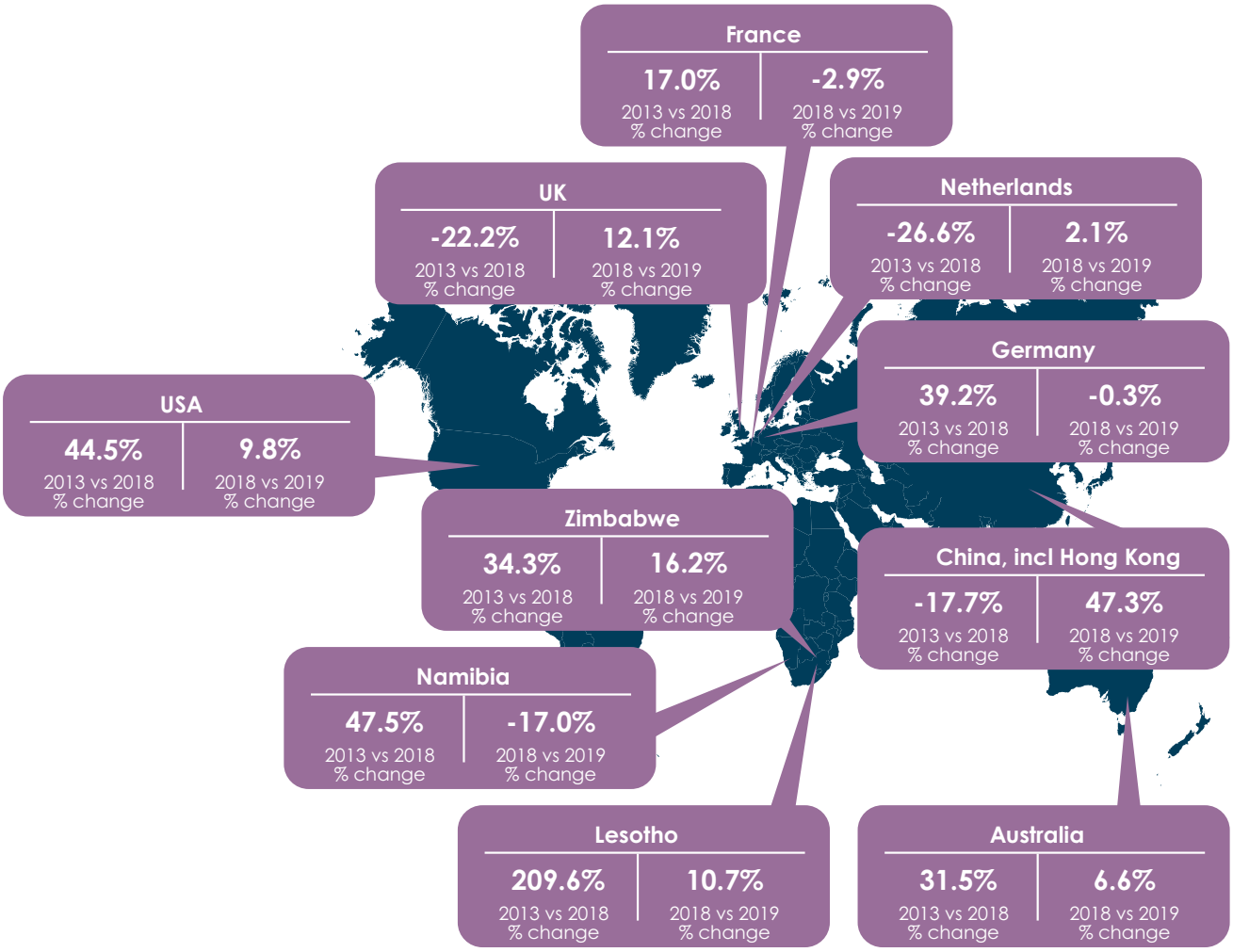
Figure 13: Western Cape total international arrivals and % change



Source: South African Tourism, 2020

The United Kingdom, Germany and the United States remained the top source markets in 2019, as shown in Figure 14, but these markets have shown marginal growth when compared to 2018.

Figure 14: Top 10 source markets to Western Cape % change 2013 vs 2018 and 2018 vs 2019



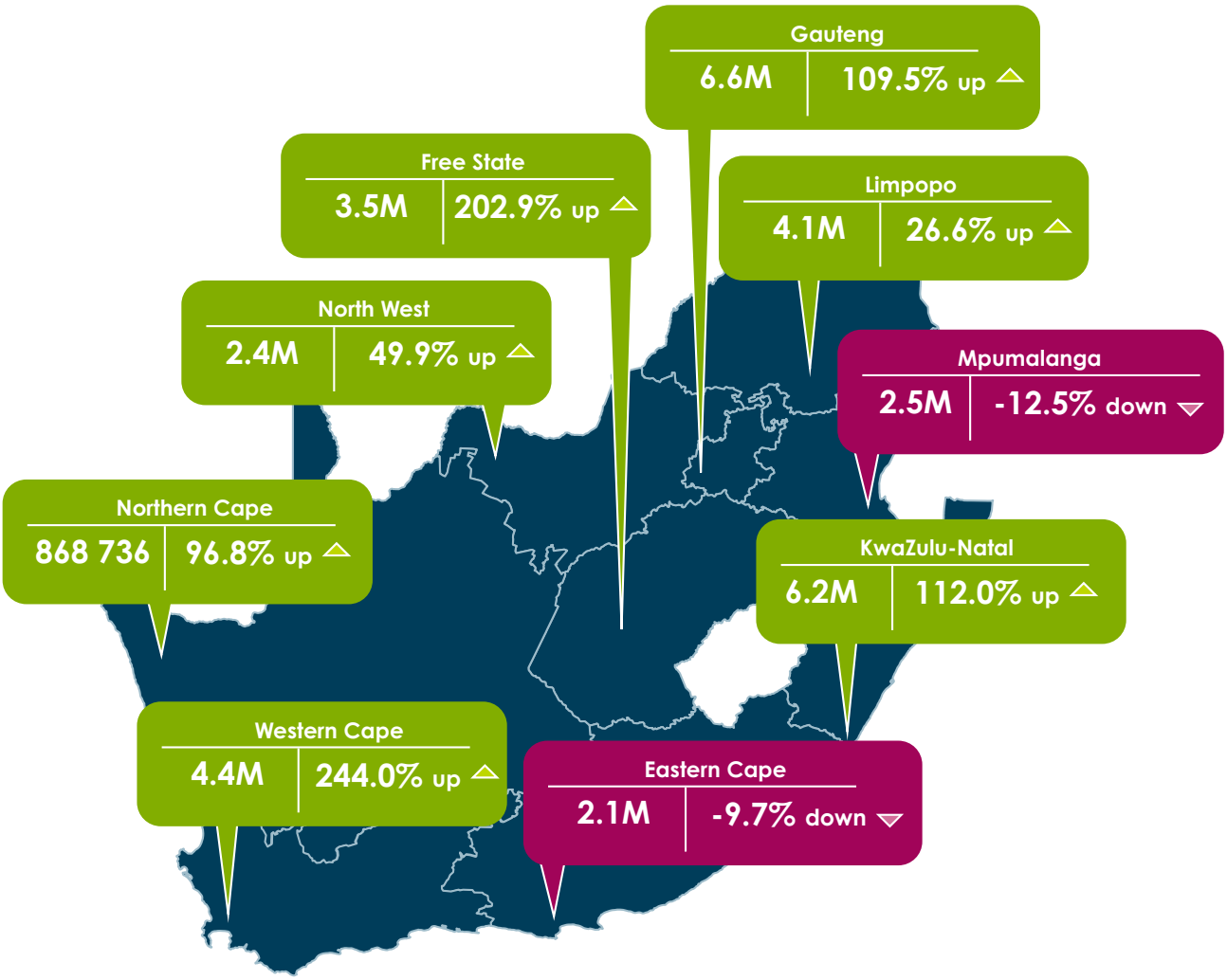
Source: South African Tourism, 2020

On average, international tourists spent 13.4 nights in the Western Cape, staying in various types of accommodation ranging from hotels, homestays (e.g. Airbnb), self-catering, guesthouses and B&Bs, and with family and friends. The industry provided close to 175 000 direct jobs. International tourists to the Western Cape were drawn to its scenic beauty, iconic city, food and wine, active adventure and culture and heritage.

An assessment of the international market potential is featured in Section 7 | International market potential.

The Western Cape experienced a dramatic increase of 244% in domestic trips taken to the province, welcoming 4.4. million South Africans in 2019. A contributing factor to this growth is SAT's marketing strategy which aims to build a culture of travel amongst South Africans as well as deal-driven campaigns by the industry. In Figure 15, we can see how the Western Cape fared compared to the other provinces. Gauteng was the most-visited province in 2019 with a total of 6.6 million domestic trips. The Western Cape was the third most-visited province.

Figure 15: Destination Province



Source: South African Tourism, 2020

2.7 Introduction to tourism value chain

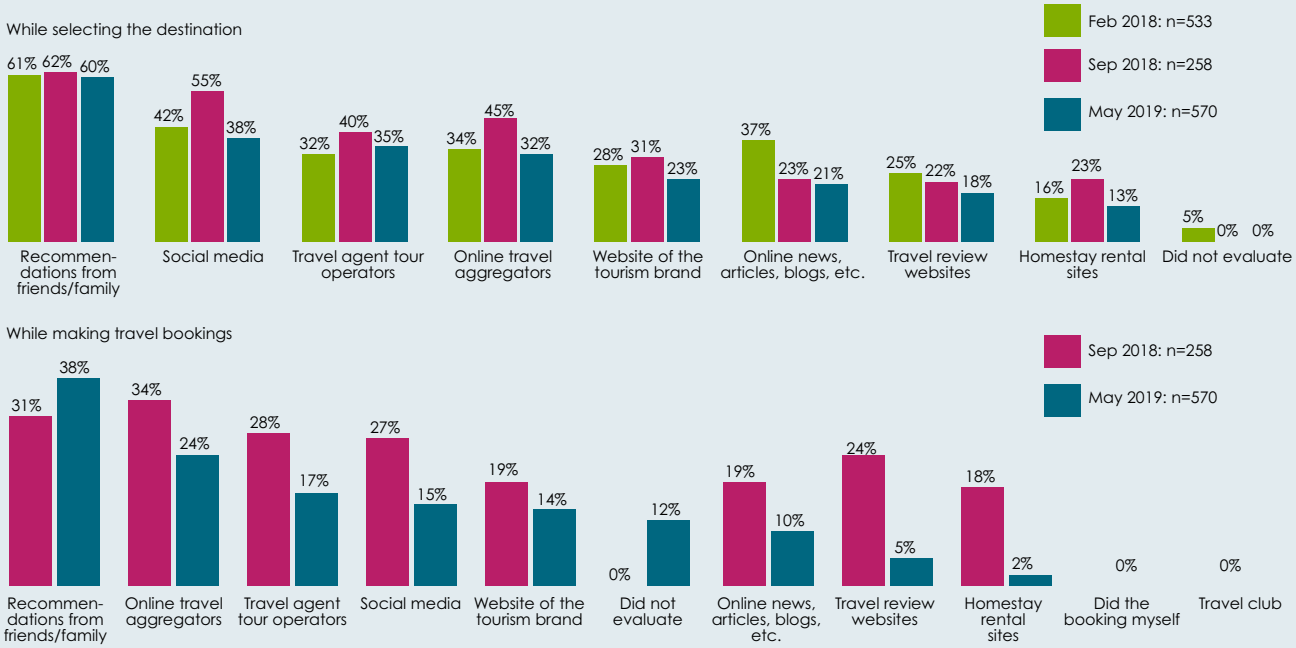
To take a holiday is expensive and tourists are required to pay for the 'product' before seeing it or experiencing it. Due to this intangible nature of tourism services, potential travellers often place considerable value on recommendations received via word of mouth (direct and electronic), online reviews, advice from travel agents and social media posts (as shown in Figures 16 and 17).

Figure 16: Top five influencing factors on booking channel choice (international market perspective)

Source: WEX-Mastercard U.S. Survey of 2019 Travel Behaviours

These recommendations build expectations with the potential traveller. The experiences offered by businesses along the tourism value chain, especially in-destination, are the manifestation of this expectation.

Figure 17: Channels used to plan a trip (domestic market)



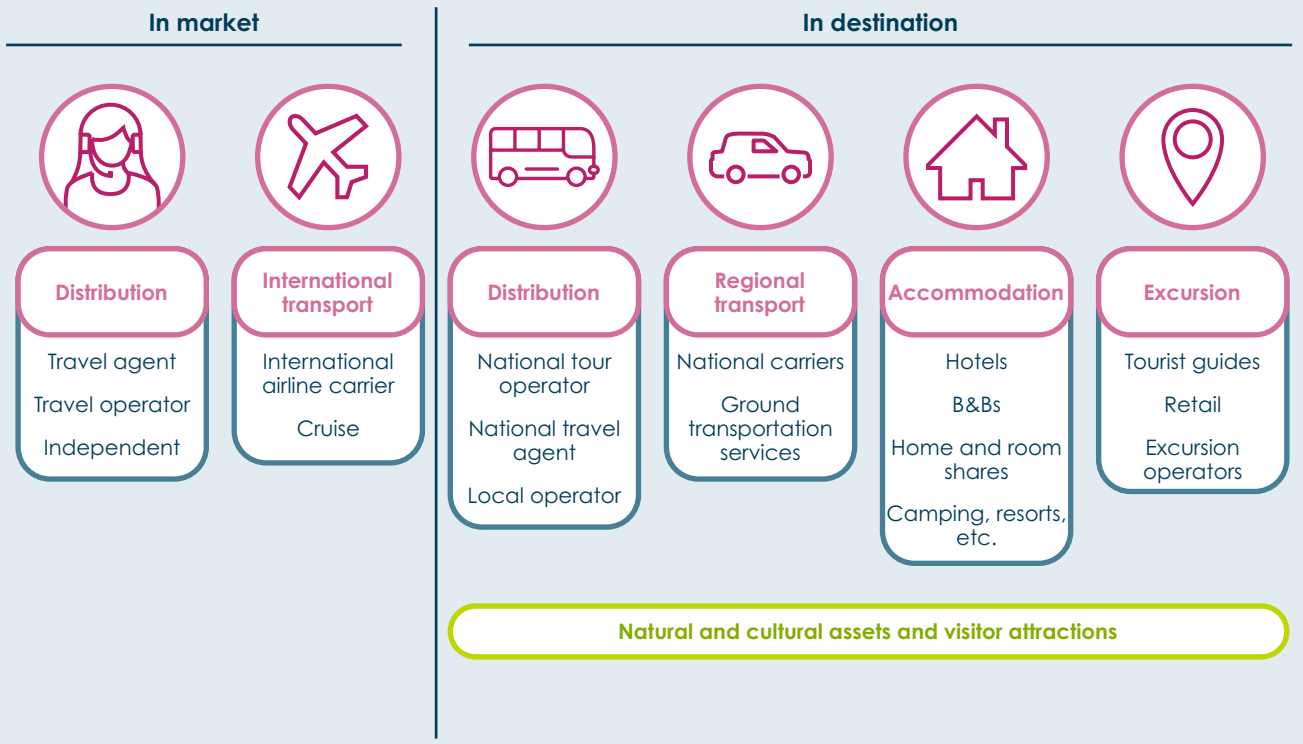
Source: South African Tourism, 2019

If the tourism value chain (shown in Figure 18) meets the demands or expectations of the visitor while in-destination, an optimal tourist experience is guaranteed. And a positive and memorable experience will ensure favourable word-of-mouth recommendations, online reviews and social media posts.

A tourism value chain therefore focuses on the **visitor experience.**

> The United Nations World Tourism Organisation (UNWTO, 2002) claims that the tourism value-chain is a continuum of related economic activities which are associated with visitors and which could be carried out at least in part within a region.

Figure 18: Tourism value chain



In market refers to the part of the tourism value chain that the potential tourists will experience from planning to booking to boarding their preferred mode of transport (e.g. international flight or cruise liner) to leave their place of residence and start their holiday.

In-destination refers to the part of the tourism value chain the tourist will experience from landing at their holiday destination, until they leave to return home. It covers experiences such as transport, excursions, shopping and accommodation.

2.7.1 Industry review of the Western Cape tourism value chain

For Tourism Blueprint 2030, the analysis of the tourism value chain was undertaken as follows:

1. Identify stakeholders involved in the delivery of the tourism experience and engage with them via two industry workshops and one-on-one interviews.

2. Identify through these engagements where all the opportunities are along the value chain to improve the visitor experience and thereby increase the visitor spend.

3. Identify areas creating challenges or barriers impacting the experience and the spend.

4. Provide suggested improvements to the tourism value chain.

The insights gained from these engagements, summarised in the tables below, helped shape the recommendations for the improvement of the Western Cape's tourism value chain.

The views expressed are those of the participants and not the Department of Economic Development and Tourism per se but are critical as evidence of input into the research process.

2.7.1.1 Tourism infrastructure and investment

Overall the stakeholders felt that tourism infrastructure and investment worked well. Areas of improvement included better public transport, tourism product mix that caters for a broader inclusion, improved safety for all and more investment into areas outside Cape Town to help drive geographic spread and inclusion as shown in the tables below.

Accommodation | **Transportation** | **Tourism Products** | **Marketing and promotion** | **Services, regulation and infrastructure** | **Investment**

1. Accommodation

What works well	What could be better	Suggested improvements
• Hotels and B&Bs (availability, differentiation of offering and price mix)	• Over-investment into the building of hotels and B&Bs, outcome is a decrease in occupancy rates • Need to have as many accommodation establishments graded as possible	• Facilitating private sector's role in short-term rentals such as Airbnb • Mentorship between large hotels and small accommodation establishments

2. Transportation

What works well	What could be better	Suggested improvements
• National road network • Regional road network • MyCiti bus service	• Management of traffic congestion • Management of road infrastructure • MyCiti has good infrastructure but is not run optimally • Non-road modes of transport • Signage at the airport	• Public transport upgrade • 'Sky Train' to Cape Town from the airport

3. Tourism products

What works well	What could be better	Suggested improvements
• Innovation and investment into unique tourism products • Cape Town International Convention Centre (CTICC) and how it has acted as a Foreshore incubator • Century City precinct • Secondary city investment (e.g. Stellenbosch) • V&A Waterfront as a tourist hub • Cape Town Stadium • Variety of conference venues available	• Leisure tourism product offering that caters better in terms of price for middle-income South Africans • Upgrade of national and provincial tourist attractions (e.g. Castle of Good Hope) • Township offerings	• Investment into a new convention centre in second-tier cities • Build better awareness of choices outside Cape Town and Stellenbosch to drive geographic spread • Second-tier cities for business events venues

4. Marketing and promotion

What works well	What could be better	Suggested improvements
• Invest Cape Town has received lots of focus		• Focused investment campaign driving the message that the Western Cape is open for business

5. Services, regulation and infrastructure

What works well	What could be better	Suggested improvements
• Basic infrastructure (e.g. sewage, water, electricity) • Telecommunication and fibre rollout, including in public spaces • Airport and Cape Town Air Access • Co-working spaces • Skills • Well-run province	• Safety for all • Improved public spaces • Empowering a diversity of tourism entrepreneurs and lowering barriers to entry into the industry	• Improved skills in travel and tourism to get new entrants into the market future-ready • Overhauling of the tourist guide curriculum • Certain infrastructure (e.g. load shedding) • More aggressive rollout of fibre outside Cape Town and its immediate surrounds • Real-time tourism data • Invest more into skills to broad social inclusion • Regulatory guidelines • Responsible tourism growth

6. Investment

What works well	What could be better	Suggested improvements
• Investment by private sector into tourism has been positive	• Investment opportunities outside Cape Town are uncertain • Investment into businesses outside Cape Town • Regulation governing investment • Clear investment pipelines • Seed funding for catalytic projects	• Collaborative and transparent investment planning • Research-based investor targeting • Faster decision-making by government • Less red tape

2.7.1.2 Tourism product development

For the stakeholders, the most significant area of opportunity is the development of a range of tourism products suited to the domestic market and at the right price point. Variable pricing for key attractions was also a point of discussion.

Marketing and promotion

Product range

Product pricing

Tourism experiences

Safety and security

1. Marketing and promotion

What works well	What could be better	Suggested improvements
• Marketing of natural attractions • Visitor guides and maps	• Improved marketing and awareness of emerging/new products and experiences • Packaging products into niche market routes • Collaboration with product offerings	• Innovative marketing • Spread tourism routes to suburbs • Sponsored tourism education

2. Product Range

What works well	What could be better	Suggested improvements
• Culture and heritage product range • Diversity of product range	• More local community-based products • More product offerings in winter • Art and culture product development • Free Wi-Fi at all key attractions • Traffic arrangements and parking at key attractions • More child-friendly offerings • Market readiness of some products • Experience authenticity (e.g. have locals from the communities do township tours) • More work done with industry to show them how to use *Nowhere Better* collateral • Need clearer targets to define what success looks like (not just arrivals) • Promote more 'good news'	• A broader range of relevant product offerings for the domestic market • Children's camps • Considerate authenticity • Networking between products • More product offerings • Upgrade and development of key attractions • Universal accessibility • Diversity of product range • Market-readiness of products

3. Product pricing

What works well	What could be better	Suggested improvements
• Variable rates at some attractions and products for domestic market	• Cape Town and the Western Cape is perceived as an expensive destination • More competitive pricing, domestic prices are high compared with international destinations	• Broader range of products priced for the domestic market (middle income)

4. Tourism experiences

What works well	What could be better	Suggested improvements
• Some experiences change lives • Repeat tourists – good experiences bring them back • Events (large and small) across the province	• Innovation	• Language skills • Service excellence • Customer care

5. Safety and security

What works well	What could be better	Suggested improvements
		• Communication around safety to be more detailed before tourists arrive • Safety and security in general

2.7.1.3 Destination marketing

Stakeholders felt that more focused marketing campaigns aimed at specific interest groups such as 'silver' travellers, millennials, people with disabilities and more focused campaigns around niche and lesser-known products and areas would be advantageous.

Marketing and promotion

What works well	What could be better	Suggested improvements
• The marketing of niche tourism offerings • Brand 'South Africa' has been driven with a Cape Town association (e.g. Table Mountain, V&A Waterfront, the food scene) • Current positioning appeals to many global markets across different levels • *Nowhere Better* collaborative campaign using digital and trade in response to the drought • Using Cape Town as a point of entry/ reference • A single memorable image i.e. Table Mountain which is easily recognisable, foundation of brand and crosses collaboration boundaries • Focus on heritage and culture appeals to US market • Use locals to tell their holiday stories via various channels • Coordinate campaigns • Marketing of well-known offerings • Partnering with well-known sports people	• Campaign for people with disabilities (do we have enough activities and products that are universally accessible?) • 'Team WC' i.e collaboration between province and municipal tourism does not exist • Include all six districts and more emphasis on each when promoting the Western Cape • A united, consistent voice/message	• Marketing campaign aimed at the 'silver' traveller and millennials • Experience the Western Cape through the eyes of locals • Use digital opportunities to enable niche tourism • Promote more experiences outside the traditional Cape Town, wine route experiences and Garden Route

2.7.1.4 Institutional arrangement and regulation, and partnerships

Institutional arrangement and regulation

Partnerships

1. Institutional arrangement and regulation

What works well	What could be better	Suggested improvements
	• Role clarification within the tourism partnership ecosystem • Brand SA – resources are wasted • Resource optimisation between province, city and districts • Visa regime (South Africa is number 35 in Africa) • South African Tourism marketing (uninspiring) • Safety and security under-resourced, no visible policing and poor criminal justice system • Education on structures • The relationship between national and provincial role-players	• 'International' currency

2. Partnerships

What works well	What could be better	Suggested improvements
• Cape Town Air Access which was a focused collaboration • *Nowhere Better* collaboration – inclusive, common goals and results driven	• Alignment between public and private sectors • Provincial, regional and local tourism offices to better support new entrants • The relationship between national and provincial role-players • Sharing of data between the public and private sectors	• Agreed-upon ROI for partners • Alignment of strategies • Enough consultation – more action • Integrate Cape Town Tourism and Wesgro • Government should enable, private sector should implement • Clarity on what goes on at government level • Workshops to enable a better understanding of the tourism strategy in terms of intention and vision • Leverage the work and consult with internationally respected conservationists such as Chris Henshilwood and Craig Foster

What works well	What could be better	Suggested improvements
• There is a lack of personalisation in the tourism value chain and how it is packaged	• Throughout the chain, the same experiences are packaged year after year, and this has resulted in the perception that "Cape Town has become boring". There is a need to change the understanding of what is available in the tourism value chain relating to excursions, natural assets and visitor attractions	• There is a lack of data to fully understand the value chain and products that supply it

2.7.2 Current investment pipeline

Table 5 below shows a list of possible investment projects identified through different sources. There is an opportunity, through innovative funding mechanisms with the National Department of Tourism, Western Cape Government and the private sector, to fund these projects.

Table 5: Possible investment projects identified through different sources

Project name	Organisation submitting	Local municipality	Town	Type of development	Stage of development
OVERBERG DISTRICT MUNICIPALITY					
Swellendam Caravan Park	Swellendam Municipality	Swellendam Municipality	Swellendam	Resort: chalets and camping sites	Upgrade of chalets
Uilenkraalsmond	Overberg District Municipality	Overstrand Municipality	Gansbaai	Resort: chalets, caravan and camping sites	Upgrade
Die Dam Holiday Resort	Overberg District Municipality	Overstrand Municipality	Gansbaai	Resort: self-catering, chalets and caravan park	Upgrade
Struisbaai Karavaan Park	Overberg District Municipality	Cape Agulhas Municipality	Struisbaai	Resort: camping and caravan park	Upgrade
Waenhuiskrans Kampeer Terrein	Overberg District Municipality	Cape Agulhas Municipality	Waenhuiskrans/ Arniston	Resort: camping and caravan park	Upgrade
Garden Route District Municipality					
De Hoek Mountain resort	Garden Route District Municipality	Oudtshoorn Municipality	Oudtshoorn	Resort: chalets, caravan and camping sites	Looking for private sector investor to partner with for financial sustainability
Calitzdorp Spa Resort	Garden Route District Municipality	Kannaland Municipality	Calitzdorp	Resort: chalets, caravan and camping sites	Upgrade
Swartvlei Camping Site	Garden Route District Municipality	Knysna Municipality	Sedgefield	Camping site	Upgrade
Victoria Bay Camping Site	Garden Route District Municipality	George Municipality	George	Camping site and caravan site	Upgrade
Kleinkrantz Holiday Resort	Garden Route District Municipality	Knysna Municipality	Sedgefield Wilderness	Resort	Vandalised

CAPE WINELANDS DISTRICT MUNICIPALITY					
Saron Holiday Resort	Drakenstein Municipality	Drakenstein Municipality	Saron	Resort: chalets and camping	Upgrade
Antoniesvlei Holiday Resort	Drakenstein Municipality	Drakenstein Municipality	Wellington	Resort: chalets and camping	Upgrade
Orleans Park	Drakenstein Municipality	Drakenstein Municipality	Paarl	Resort: chalets and camping	Upgrade
Kliprivier Park	Witzenberg Municipality	Witzenberg Municipality	Tulbagh	Resort: chalets and camping	All buildings vandalised

2.7.3 Summary of the tourism value chain engagements

Throughout the workshops and interviews, it became clear that there is a lack of understanding of the tourism value chain and how to collaborate to enhance its functionality.

The industry also felt that there is enough supply to meet the demands of the tourists; however, a single database of all products in the value chain was urgently required. This database would need to be updated in real-time to include new entrants into the markets and remove those leaving the market.

The industry also feels that there is a lack of product consistency across the value chain (e.g. a five-star hotel in Cape Town and a five-star hotel in Knysna offer a different visitor experience) .

The industry also feels that there is a lack of personalisation in terms of how the destination and the offering along the value chain is packaged.

2.8 Summary

The Western Cape has a vast amount of potential, allowing it to compete globally as Africa's top destination. However, growth has not lived up to expectations, both in terms of international arrivals and domestic tourists. It will be vital to understand what the barriers to growth have been as set out in this section, where the opportunities lie and what can effectively be delivered to help reach the robust targets set as part of this blueprint. Feedback from the industry workshop also highlights opportunities that can assist tourism in reaching its potential and where challenges lie.

The suggested improvements put forward in this section will be used as indicators of potential opportunities and gaps in Section 10 | Opportunities and gaps.

3 Forces and trends

3.1 Overview

Over the next decade (2020 – 2030) there will be global forces of development that will impact society, world economies, policies, the environment and technology. These forces will define what the future world will look like and these forces will also shape trends.

When these forces intersect, trends emerge. Trends are emerging patterns at a given time, often connected to popularity, that impact society and require a response. In the case of Tourism Blueprint 2030, it is a travel and tourism response.

Based on the research conducted for Tourism Blueprint 2030 (Annexure 1), we take note of six fundamental forces and six key trends as a result of these forces intersecting, that will impact the travel and tourism industry.

> "Trends are like horses; they are easy to ride in the direction they are going" (John Naisbitt).

This implies a large volume of over-60-year-olds with disposable income that could be spent on travel. It would be advantageous for the Western Cape Government and business to understand the needs of this demographic, which includes responses to mobility options and perceptions of safety and security of the destination.

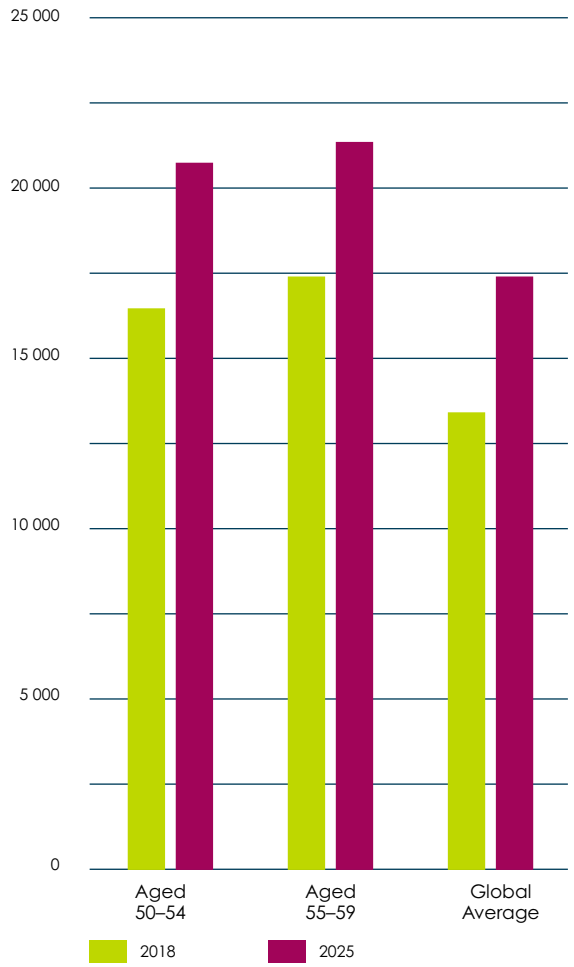
3.2 Introduction to forces

3.2.1 Ageing population

The United Nations predicts that by 2030, 11% of the estimated 8.5 billion people inhabiting the earth will be over 65 years old. This age group will be the fastest-growing age segment.

This age group will also be in a better financial position than the global average, according to Euromonitor's Global Consumer Trends 2019 report, as shown in Figure 19.

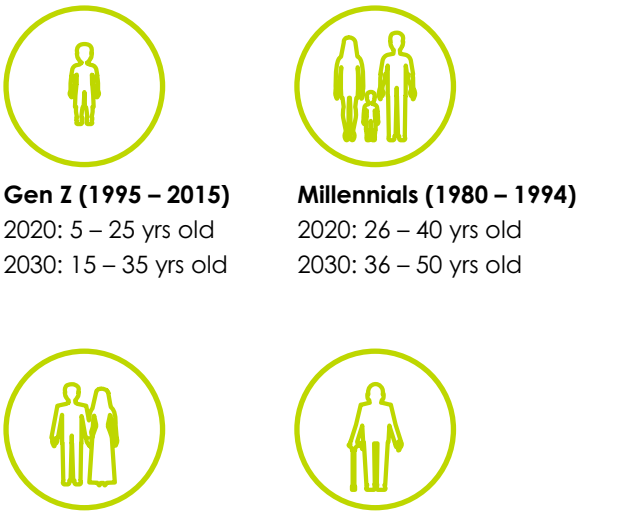
Figure 19: Average annual gross income in US$ 2018/2025



Source: Euromonitor's Global Consumer Trends Report, 2019

It is, however, important to note that over the next 10 years (2020 – 2030), as shown in Figure 20, Gen Z will form a large part of the travel and tourism market.

Figure 20: Age ranges of generations



As with the Millennials, Gen Z may have less disposable income compared with the Baby Boomers, but they will also invest less money in life insurance, homes, and cars. They will start families later and spend more on experiences.

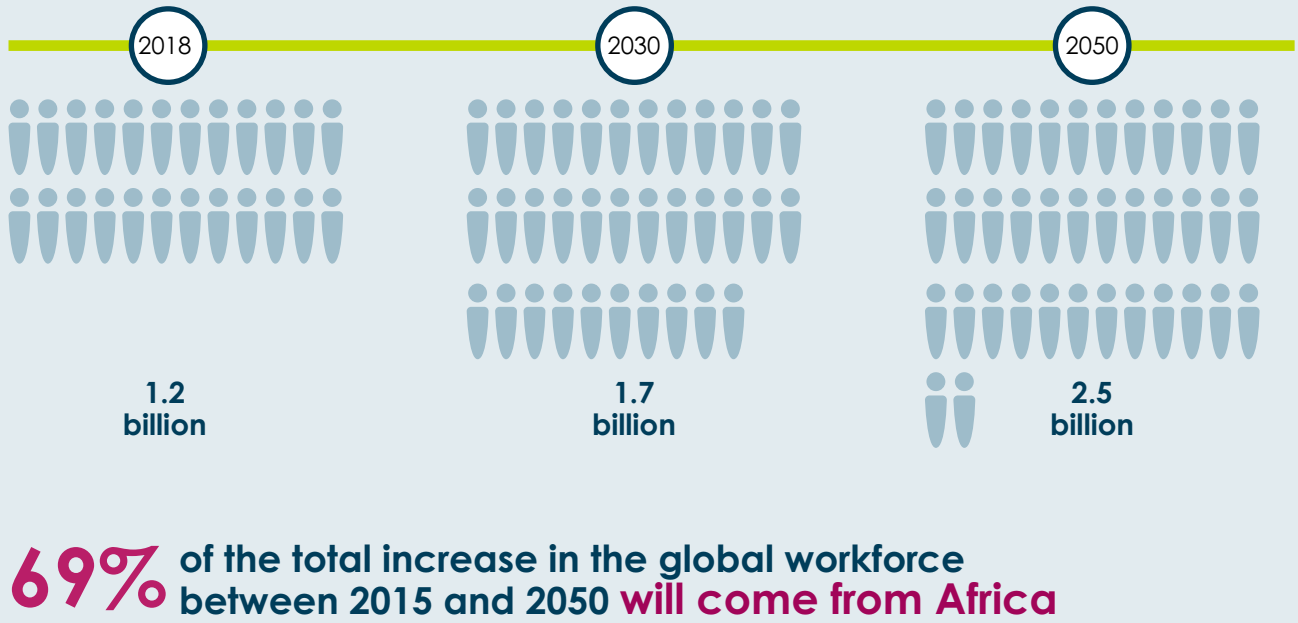
This change in priorities compared with Baby Boomers will make them a dominant consumer segment for experiential purchases such as travel and tourism.

3.2.2 Urbanisation

In 2018, 55% of the world's population lived in urban areas, which will increase to 68% by 2050, according to the United Nations. Asia and Africa will account for 90% of this increase. As population sizes dramatically grow in these regions, there will be a power and demographic shift from West to East. Figure 21 shows the demographic growth expected in Africa.

Against this backdrop of rapid urbanisation and population growth, the middle classes in Africa are emerging as potential consumers for the travel and tourism industry.

Figure 21: Demographic growth of Africa



Source: African Union Commission/OECD (2018), 'Megatrends affecting Africa's integration into the global economy,' in Africa's Development Dynamics 2018: Growth, Jobs and Inequalities, OECD Publishing, Paris/ African Union Commission, Addis Ababa.

The International Monetary Fund (IMF) also estimates that consumer spending in Africa will triple to US$2.2 trillion by 2030, with six of the 10 fastest-growing economies in the world in Africa.

Rapid urbanisation will, however, impact living conditions in cities in Africa. Along with an increase in population size comes the increase in arrivals as tourists are attracted to bustling and developing cities. Visitors, in turn, will make temporary demands on services and facilities, whereas the needs of citizens are permanent.

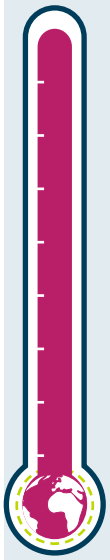
For tourism, cities will be under more pressure to deal with issues such as capacity management, and city planners will need to understand the interdependent and reciprocal relationship between the visitor and citizens.

Destination management and urban planning will need to be mindful of seasonal influxes of visitors when planning for current and future urban centres.

3.2.3 Climate change

The world is experiencing extreme weather conditions and climate change, with the four hottest years ever recorded occurring during the period between 2015 and 2018 (World Meteorological Organisation, 2019) as shown in Figure 22.

Figure 22: Earth in the hot seat



Earth in the hot seat

In 2018, global CO_2 emissions rose 1.7% to the highest level since 2013 – intensifying the effects of climate change.

Source: World Economic Forum, April 2019

2015 – 2018 were the 4 hottest years ever recorded.

Source: World Meteorological Organisation, February 2019

In recent years South Africa has felt the impact of this. The country can experience a drought in one province and floods in another on the same day. These extreme conditions affect natural resources, such as water, energy, minerals, metals and food.

The Western Cape itself is no stranger to the impact of climate change. In 2017 and 2018, the region experienced its most enduring drought in 100 years, a drought that forced severe water restrictions and investment into sustainable water practices for citizens and businesses.

The implication of climate change and increasing populations, especially in developing countries such as South Africa, is the accelerated demand for natural resources. The government will need to respond by developing new regulations, and businesses and communities will need to respond by creating new behaviours to help reduce the dependency on natural resources. There will also be an expectation of visitors to be more mindful when visiting afflicted areas.

3.2.4 Technology shifts

> In the workplace of the future, "humans may supplement the skills of machines – and not the other way around," predicts Columbia Business School's Bernd Schmitt.

By 2030 it has been projected that affordable artificial intelligence (AI) will achieve human levels of intelligence. With every new device connected to the internet by the internet of things (IoT), much of our daily lives will be impacted by AI and machine learning.

The implication for travel and tourism is that some human jobs are replaced by robots (e.g. hotel check-ins) while new posts are created.

As AI brings along with it the power of automation, it is helping make travel experiences more niche and targeted towards tourists. AI can help travel agents analyse a tourist's profile by looking at their preferences, budget, location, eating habits and choices, thereby helping produce personalised and tailor-made suggestions for tourists. Many companies in the market use AI to enhance travel experiences too (Mashable India).

Job creation within the travel and tourism industry will need to focus on roles that include data analysts, software developers and social media specialists. Jobs that require 'human skills' such as sales and marketing, innovation, and customer service are expected to increase in demand.

3.2.5 Empowerment of the individual

This force has seen the rise of movements such as #blacklivesmatter and #gendergap. The individual needs are rising above those of the collective. Individuals are becoming more empowered to demand specific outcomes, personal and beneficial to them.

The impact of this force has seen the rise of the sharing economy, where individuals can leverage their assets to contribute to existing traditional industries (e.g. Airbnb or Uber). It has also seen the citizen's expectations evolving, placing great importance on holding organisations and individuals accountable in terms of the impact on society and the environment (triple bottom line).

3.2.6 Wellbeing

Globally we see more lifestyle-related disorders and diseases, and this will increase over the decade. Society as a whole, and governments, are becoming more concerned with issues such as obesity, food sensitivity and disease. These concerns will increase the amount of personal and public funding for these issues.

However, perceptions are moving from simply physical health to a more holistic view where food, exercise, mental wellbeing and broader lifestyle issues are seen as a whole entity (Euromonitor, Megatrend Healthy Living, 2017).

The travel and tourism industry will need to weave wellbeing into all aspects of their offering.

3.3 Introduction to trends

My world in my hand

Personal and purposeful

Digital detox

From FOMO to JOMO

Multi-generational travel

Solo travel

3.3.1 My world in my hand

Not only has technology become an essential part of the travel experience, offering immediate, in-destination opportunities for discovering, booking, doing, rating and sharing, it has also impacted how we connect and consume media.

With the rise of social media platforms and the technological improvements on mobile phones, such as HD cameras, much of the content we consume today is user-generated. Consumers, through their posts and comments, are influencing other people's purchase decisions.

The implication for travel and tourism is that the image-based nature of user-generated content, and the trust people place in customer reviews, will impact the role of destination marketing organisations and how the tourism industry does marketing and promotion.

"Customer reviews are trusted 12 times more than marketing coming directly from an organisation." (www.crowdriff.com)

3.3.2 Personal and purposeful

As the world wakes, 'up close and personal' travel experiences are evolving into 'up close and purposeful'. Tourists are understanding and being mindful of the difference they can make to people and places around the world through their travels.

34% of travel agents responded that their customers are "specifically looking to immerse themselves in the destinations they visit and travel like a local" in a recent poll conducted by American Express.

Looking to the future, the opportunity for tourism lies in increasing the amount of innovation into an investment around experiential, community-engaging and community-benefiting forms of tourism. This approach will also ensure that the sector acts in a truly responsible and sustainable way.

3.3.3 Digital detox

The pressure of always being 'on' is creating a need to 'switch off'. Tourists are disconnecting from tech-powered lifestyles to get reconnected with themselves and their travel companions.

Always being 'on' has created a culture where:

1. Immediate in-travel sharing, comparing and commenting has become an obsession for literally millions of tourists
2. Working while on holiday (e.g. checking emails, responding to messages, not leaving an 'Out of Office' message) has become the unspoken statement of employee responsibility and value
3. Tourists look to do more, with less time and shorter lead-time

4. Technology has become a vehicle for the buoyancy of mental stability, sense of inclusivity and expression of identity.

> "70% of internet users between 16 – 64 in the United States and United Kingdom have made deliberate efforts to limit digital consumption" (WTTC, 2018).

3.3.4 From FOMO (fear of missing out) to JOMO (joy of missing out)

JOMO responds to concerns regarding the constant need to be connected. JOMO is about taking back control from your smartphone by cutting down on social media, apps and emails. But it does not mean complete disconnection.

Tourists are looking to set boundaries and travel offers them an opportunity to dedicate their offline time to themselves on activities they enjoy at their chosen pace.

3.3.5 Multi-generational travel

Multi-generational travel is generally made up of three generations of a family. As grandparents (Baby Boomers) are living longer, and have time and resources to travel, it allows them an opportunity to connect with their families, and the chance to explore the world.

> "40% of all active leisure travellers have taken at least one multi-generational trip over the last year" (MMGY Global, 2019).

The implication for the travel and tourism industry is that the parents are no longer the only decision-makers when it comes to planning a trip; grandparents and children are also influencing travel plans. The budget also plays an important deciding factor. Families are expecting a level of comfort and style that suits everyone, with memory-making experiences a high priority.

3.3.6 Solo travel

The ability and desire to travel on your own has dramatically increased over the past decade. This trend is strongly driven by the increasing need to 'get away', the increased ease in planning and booking your trip, connecting mobile lifestyles and the desire to connect with others while travelling.

> "67% of solo travellers are female (Lonely Planet, 2018) and 40% of Baby Boomers have taken a solo trip in the past year" (Forbes, 2019).

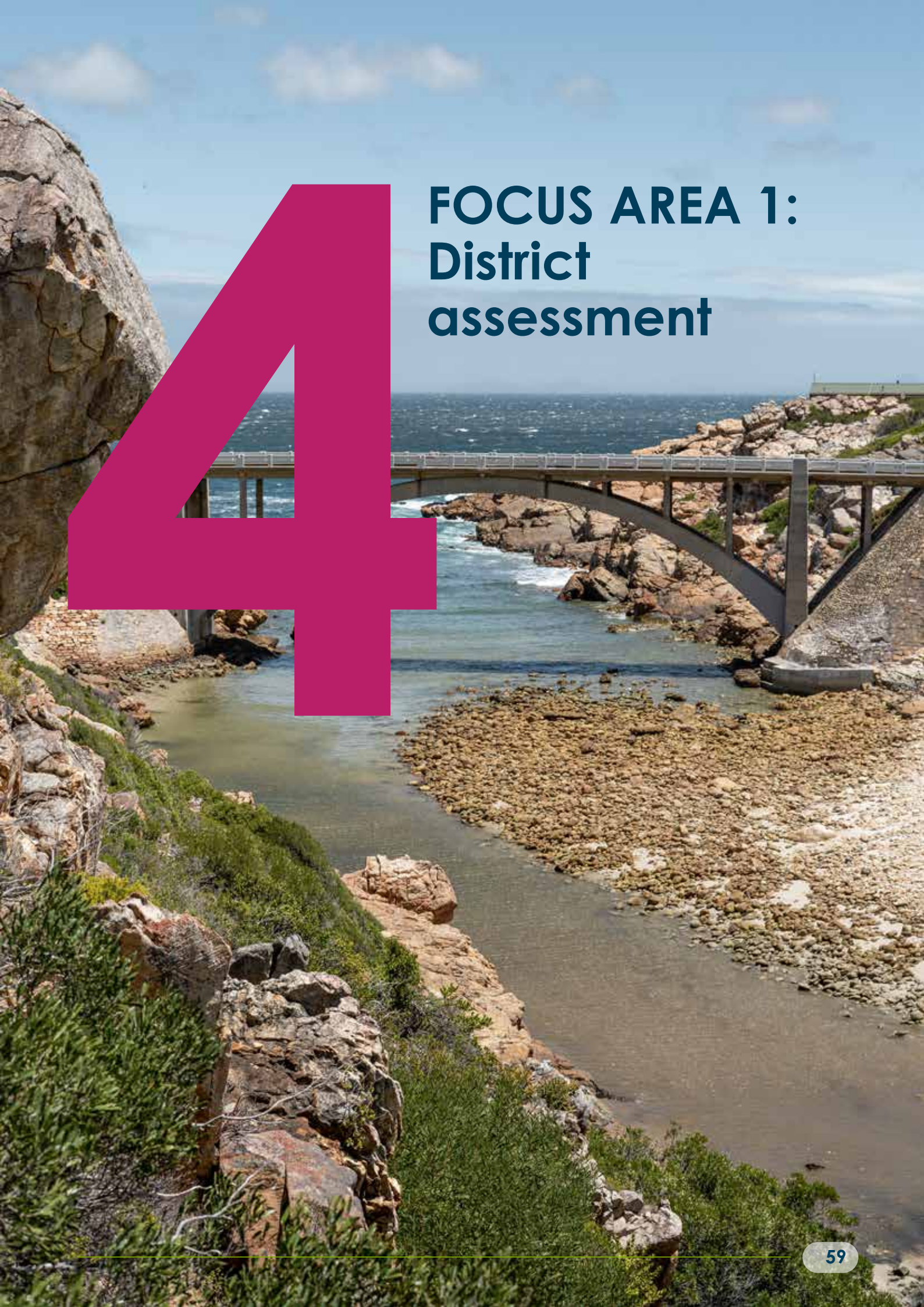
The opportunity for the travel and tourism industry is the development of solo tourism products that are easy to plan, flexible to personal needs and priced accordingly.

3.4 Summary

The travel and tourism industry's ability to respond to relevant forces and trends is critical for business success in all sectors and at all levels of business. An ageing population, rapid urbanisation, climate change, technology shifts, empowerment of the individual, and wellbeing are all global forces which are complex and will impact the travel and tourism industry.

These forces also encapsulate key trends which the industry needs to respond to adeptly. The use of technology (the world in my hand), a more mindful consumer (personal and purposeful), switching off (digital detox), the joy of missing out (JOMO) and the choice to travel with your family (multi-generational travel) or alone (solo travel) are all trends business owners must understand and explore in terms of how they will impact their business, both positively and negatively.

Lastly, Covid-19 has accelerated many of the forces and trends discussed here, necessitating agility, adaptation and innovation.



4 FOCUS AREA 1: District assessment

4.1 Introduction

The following section provides an assessment of each municipal district looking at how the online conversation is shaping a digital narrative about the districts and what the district has to offer currently from a visitor attraction perspective. Through these assessments, there is an identification of gaps and opportunities put forward as suggestions.

4.2 The role of visitor attractions in the visitor economy

Visitor attractions play an essential role in creating a thriving tourism destination. Often the lure of a visitor attraction or an experience is what entices the tourist to leave home in the first place. Swarbrooke argues that visitor attractions are the most critical piece in the tourism economy. Attractions act as the primary motivator for travel and Swarbrooke states that "without attractions, there would be no need for other tourism services" (Swarbrooke, 2002). Visitor attractions are therefore central to tourism and play a significant role in the tourism value chain.

Successful visitor attractions have an economic, socio-cultural and environmental impact in the region within which they operate (Swarbrooke, 2002). Increased numbers of tourists to a visitor attraction result in increased spend and create direct and indirect work, procurement opportunities for the local community and income for the preservation, protection and expansion of the visitor attraction and its surrounds. Visitor attractions can also have negative impacts. Work is often poorly paid and seasonal. Many visitor attractions are not financially sustainable and highly successful ones may have capacity issues leading to poor quality of experience or contributing to tourism pressure.

If the support structures and services are not in place for high-demand visitor attractions, the impact of high visitor numbers may negatively affect the environment.

4.3 The definition of a visitor attraction

For Tourism Blueprint 2030, we have used the same criteria as Visit Britain to define a visitor attraction for research purposes (https://visitbritain.org/annual-survey-visits-visitor-attractions-latest-results).

The criteria are:

1. It is feasible to charge admission (i.e. an entry gate)?
2. The visitor attraction is a permanent establishment
3. The visitor attraction's primary purpose is to allow access to entertainment, interest, or education
4. The visitor attraction is open to the public
5. The visitor attraction is capable of attracting day visitors or tourists, as well as local residents

4.4 Defining the success of a visitor attraction

Developing visitor attractions is capital intensive. Gaining and retaining tourists requires ongoing investment. Unfortunately, both internationally and locally, there are many examples of failed visitor attractions. It is not the case that "if we build it, they will come". Visitor attractions vie for the tourist's time, attention and discretionary spend – all of which are in increasingly short supply.

Large and small attractions are all part of the tourism landscape and have an essential role to play in the tourism value chain. Visitor numbers are not the only metric or the most critical metric of success. Performance measures vary according to the major stakeholders involved. They may include visitor numbers, income and revenue generated, guest satisfaction, the authenticity of site and attainment of objectives such as education and community and funder objectives.

Ultimately, each site needs to be measured by whether it is fulfilling its mandate and vision. But what value is fulfilling a mandate, if no one walks through the door? Tracking admissions is an important start.

4.5 The role of different types of attractions

Attractions can be segmented as follows, based on their unique role:

1. Iconic attractions
2. Landmark attractions
3. Pop-up attractions

4.5.1 The role of iconic attractions

The impact that an iconic attraction can have on its surrounds can be enormous. Visitor attractions seldom stand on their own and are generally part of a broader ecosystem that draws tourists to their node.

Researchers have indicated what attributes make an iconic visitor attraction (Rumakumba, 2014). These are:

1. The brand is more prominent than its location, the visitor attraction is known for itself rather than its precise location
2. The visitor attraction can draw tourists from outside the region
3. The visitor attraction is unique
4. The visitor attraction can attract new tourists; the attraction is the primary purpose of the visit
5. The visitor attraction has longevity
6. The visitor attraction should be nationally recognised and well known regionally
7. The visitor attraction can flatten seasonality
8. Information is readily available pre-visit so that the visitor attraction can act as part of the pre-trip decision-making
9. The visitor attraction receives ample media attention

4.5.2 The role of landmark attractions

Landmark attractions relate to a place's identity and act as a prominent marker, often a visual marker. They are lesser known, but can still serve as a drawcard once in the destination and can act as a mini-icon for their districts.

4.5.3 The role of observational experiences as visitor attractions

Observational experiences have grown in popularity worldwide. These are attractions that range from purpose-built observational towers (e.g. Eiffel Tower) to multi-use sites that allow for observational experiences (e.g. Bloukranz Bridge). Other types of observational experiences include:

1. Ferris wheels (e.g. The Cape Wheel at the V&A Waterfront)
2. Historical landmarks (e.g. the lighthouse at Cape Point)
3. Cable car experiences (e.g. Table Mountain Cableway)
4. Natural sites (e.g. Lions Head)

Observational experiences are fun, provide 'Instagrammable' moments due to a different photographic perspective by gaining height, are family-friendly and often seen as 'must-do' activities.

4.5.4 The role of pop-up attractions

There has been a rise in pop-up attractions that is proving to be very successful. Pop-up attractions are useful in that they can move to where the tourists are, or move around to draw tourists to a region and augment the seasonal offering. Once a primary drawcard is no longer available (e.g. the flower season), the season could be extend by implementing pop-up immersive museums. Popular pop-up attractions can act as brand ambassadors for the region. It should noted that while the pop-up attraction may not be permanent, the offering still needs to be of a high quality. As pop-up attractions are often aimed at younger travellers, many focus on immersive, social, experiential, fun and highly instagrammable installations (Blooloop, 2019).

4.6 Methodology and process for the evaluation of visitor attractions

An assessment of a selection of visitor attractions in the following six districts was done: (1) Cape Town Metropolitan Municipality, (2) West Coast District Municipality, (3) Central Karoo District Municipality, (4) Overberg District Municipality, (5) Cape Winelands District Municipality and (6) Garden Route District Municipality. The assessment was done to determine the appeal of the visitor attraction for that particular district. This assessment took place in four stages:

1. An audit of each attraction was done via face-to-face interviews, and the researcher visited each of these attractions

2. Each visitor attraction was then segmented based on its quality of experience vs the visitor numbers

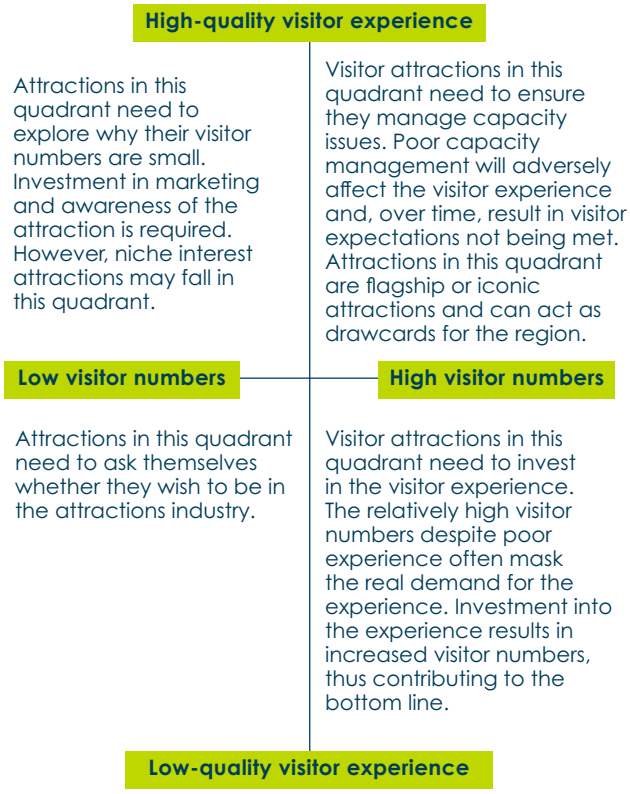
3. The next step was to position each visitor attraction and experience in the tourism nuclei

4. Finally, gaps were identified, which could provide a starting point for the destination management of the district

4.6.1 The visitor attraction segmentation

Quality of experience and number of visitors provided the variables for the visitor attraction segmentation as shown in Figure 23.

Figure 23: Visitor attraction segmentation



4.6.2 The tourism nuclei

Visitor attractions have different roles to play in influencing a tourist's decision to visit. Visitor attractions thrive when clustered together or form a route of complementary experiences. Clustered nuclei of tourism activities can overcome the need for one major dominant feature. For Tourism Blueprint 2030 the following clusters were identified.

The primary nuclei contain markers that are known to the tourist at their place of origin and often provide the main motivation to travel (Dredge, 1999). They usually include iconic attractions that are influential in the tourist's decision to travel – they are a drawcard (Edelheim, 2015). For a visitor attraction to have a primary influence on a touris's destination, it would require that information is available pre-visit such that it stimulates the motivation to visit the site.

Attributes of primary nuclei:

1. Iconic attraction
2. Information is readily available pre-visit so that the visitor attraction can act as part of the pre-trip decision-making
3. Attraction receives ample media attention

Seasonal nuclei

Secondary nuclei of attractions are known to the visitor pre-visit but do not play a significant role in the decision-making of the trip (Leiper, 1990).

Tertiary nuclei of attractions are those that are unknown pre-visit but discovered after arriving in the destination (Leiper, 1990).

As Leiper (1990) states, destination marketing would aim to ensure that as many attractions as possible fall into the primary nuclei category – thus providing multiple motivations to visit the destination.

4.7 Summary

Visitor experiences and attractions play a crucial role in the tourism economy. Well-run and well-placed visitor attractions can draw tourists away from traditional routes and act as a conduit for creating new nodes of interest and tourism routes for international and domestic tourists. They are an essential link in the visitor economy.

4.8 Visitor attraction potential of the Cape Town Metropolitan Municipality

4.8.1 Introduction

The Cape Town Metropolitan Municipality is a bustling melting pot of cultures, tastes and experiences for young and old. Tourists have the opportunity to experience state-of-the-art shopping malls, open-air markets, outdoor adventures, a vibrant nightlife and windows into the city's rich history, in the shadow of Table Mountain. The city borders the world-famous Table Mountain National Park.

Figure 24 gives a socio-economic overview of the Cape Town Metropolitan Municipality.

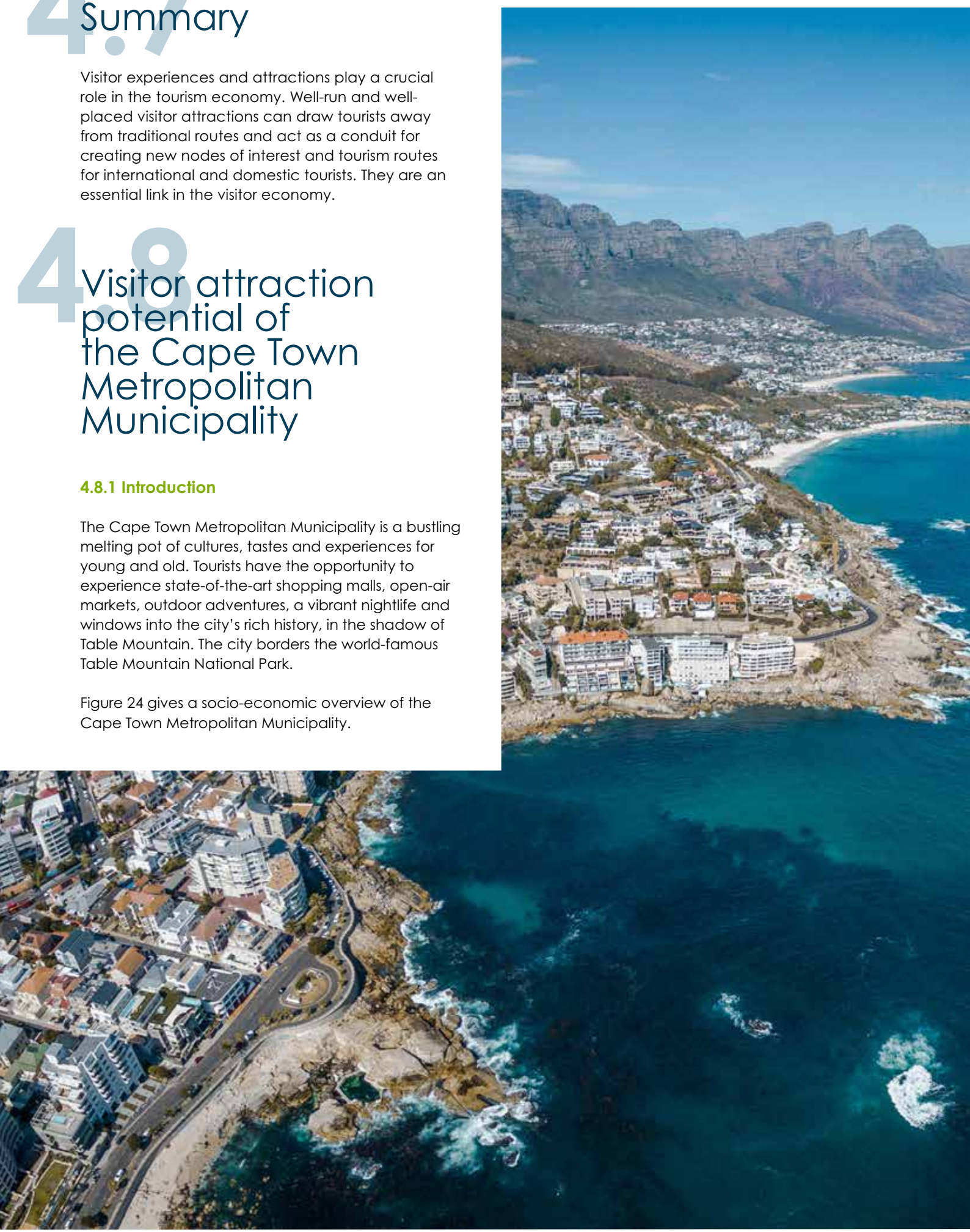


Figure 24: Socio-economic overview of the Cape Town Metropolitan Municipality

CAPE TOWN METROPOLITAN MUNICIPALITY (CM)

QUICK FACTS	
AREA	2 446.4 km²
DENSITY	1 844/km²
SEAT	Cape Town
CITY/TOWNS	Cape Point, Somerset West, Atlantis, Robben Island

DEMOGRAPHICS

POPULATION
4 511 471
2019

NUMBER OF HOUSEHOLDS
1 323 438
2019

AVERAGE HOUSEHOLD INCOME
R20 681
2018

INDIGENT HOUSEHOLDS
220 796
2019

GENDER
49,4% 50,6%

AGE COHORTS (2019)

0 – 14	15 – 64	65+
24.0%	69.4%	6.6%

GROSS DOMESTIC PRODUCT

GDPR
R423.2 billion
2018

% OF WESTERN CAPE GDPR
71.8%
2018

GDPR PER CAPITA
R97 896
2019

ESTIMATED GDPR GROWTH

2019	2020	2021
0.5%	-7.3%	3.8%

EMPLOYMENT

NUMBER OF EMPLOYED
1 662 989
2018

ESTIMATED NUMBER OF JOBS LOST
3 564
2019

ESTIMATED UNEMPLOYMENT RATE
23.1%
2019

TRADE

IMPORTS R185.7
EXPORTS R87.4
R IN BILLIONS (2019)

TOP 3 EXPORT PRODUCTS (2019)

PETROLEUM OILS
CITRUS
APPLES, PEARS, QUINCES

TOP 3 EXPORT DESTINATIONS

NAMIBIA
BOTSWANA
UNITED STATES

TOURISM

OVERSEAS 33.3%
DOMESTIC 66.7%
VISITORS (2019)

TOP ACTIVITIES (2018)

SCENIC DRIVES	OUTDOOR ACTIVITIES	CULTURE/HERITAGE
30%	52%	17%

Soure: MERO, 2020

4.8.2 Destination positioning

As part of Tourism Blueprint 2030, a comprehensive analysis was done over the duration of a year of what over 300 000 people were saying online about Cape Town. Insights from this data could guide strategic planning, marketing and development to enable the destination to shape the way people will talk about Cape Town in the future.

Core conversation drivers are assets and experiences that show the highest volume of conversation online and therefore have the most awareness, but not necessarily the highest sentiment. These drivers for Cape Town are:

1. Nature photography
2. Beaches and shorelines
3. Restaurants
4. Festivals and events

The opportunity lies in improving the tourism experience around these activities to improve sentiment performance.

Potential growth opportunities may not generate the most volume but are creating the highest sentiment and are often around niche forms of tourism.

These are:

1. Wineries and wine
2. Hiking and rock climbing
3. Equestrian activities (e.g. horse racing)
4. Windsports

The opportunity for Cape Town is to look at the development of these assets and experiences to attract more visitors.

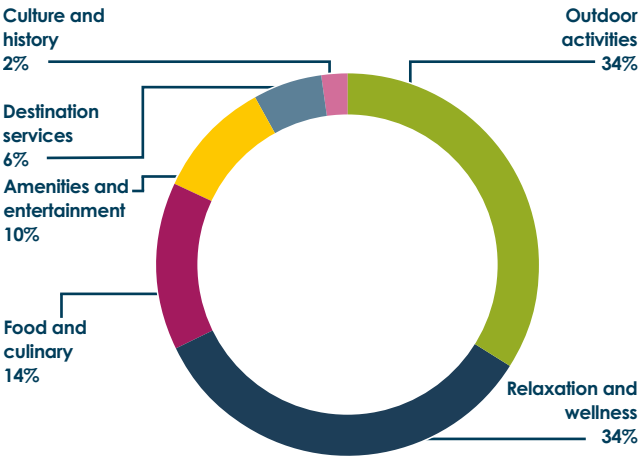
Underperforming assets that fell well below the competitive set average and therefore could drive a negative sentiment for Cape Town are:

1. Access and transportation
2. Tours

There is a requirement to review these activities and look for areas of improvement.

When looking at individual tourism activities (Figure 25), outdoor activities, food and culinary and relaxation and wellness generate the highest volume of online conversations. When compared to their competitors, they scored high in terms of volume. However, the sentiment shared for these activities was average when compared to Cape Town's competitors.

Figure 25: Tourism categories



Source: TSI, 2019

Attraction	Sentiment		Volume	
	Cape Town	Comparative Performance	Stellenbosch	Comparative Performance
Destination Services	46	Average	146 181	Average
Outdoor Activities	52	Average	613373	High
Food + Culinary	57	Average	315305	High
Relaxation + Wellness	52	Average	415898	High
Amenities + Entertainment	31	Average	309339	Average
Culture + History	37	Average	89953	Average

The implication thereof is that these tourism experiences themselves require enhancement. Another interesting point to note is that the volume of conversations around culture and heritage scores the lowest in terms of volume and the city itself as a destination (i.e. city breaks) does not feature at all. Cape Town as a city offers a rich history of culture and a deduction can be made that these experiences are either relatively unknown or the experience itself is not generating a high volume of engagement and online conversations, similarly with the perception of Cape Town as a city break destination.

4.8.3 Tourism attractions audit

To get a better understanding of the current product offering in the Cape Town Metropolitan Municipality and identify possible gaps, an audit of 12 visitor attractions took place. Please refer to Table 6 for the audit.

Table 6: Cape Town Metropolitan Municipality attractions audit

Attraction	Type of attraction	Annual visitors*	Adult admission fee	Child admission fee	% Adult	% Child
Table Mountain Cableway	Observation experience	500 000 +	R100 – R330	R145 – R165	84%	16%
Groot Constantia	Culture/ heritage	250 001 – 500 000	Entry free, tastings from R100	free	90%	10%
Kirstenbosch Botanical Gardens	Nature	500 000 +	R70	R20	87%	13%
Cape Point National Park	Nature	500 000 +	R76 – R303	R39 – R152	n/a	n/a
Cape Point Funicular	Observation experience	250 001 – 500 000	R80		93%	7%
Two Oceans Aquarium	Animal encounter	500 000 +	R185	R90	60%	40%
Norval Foundation*	Culture/ heritage	50 001 – 100 000	R180	free	89%	11%
Robben Island Museum	Culture/ heritage	250 001 – 500 000	R380 – R550	R200 – R300	95%	5%
Castle of Good Hope	Culture/ heritage	100 001 – 250 000	R50	R25	80%	20%
Cape Wheel	Observation experience	250 001 – 500 000	R155	R75	75%	25%
Zeitz MOCAA	Culture/ heritage	250 001 – 500 000	R200	Free	92%	8%
Iziko Museums (All)	Culture/ heritage	500 000 +	R30	R15	n/a	n/a

Attraction	% domestic	% international	Opening times	Closed days	Dwell time (hrs)	Full Time Employees	Contract Employees
Table Mountain Cableway	40%	60%	08:30 – 20:30	0	1.5	200	160
Groot Constantia	30%	70%	09:00 – 17:30	0	1.5	48	5
Kirstenbosch Botanical Gardens	70%	30%	08:00 – 19:00	0	1.5	n/a	n/a
Cape Point National Park	40%	60%	06:00 – 18:00	0	2	n/a	n/a
Cape Point Funicular	28%	72%	09:00 – 17:30	0	0.25	21	5
Two Oceans Aquarium	60%	40%	09:30 – 18:00	0	1.5	102	40
Norval Foundation*	60%	40%	10:00 – 18:00	1	2	76	2
Robben Island Museum	30%	70%	09:00 – 18:00	0	3	267	n/a
Castle of Good Hope	95%	5%	09:00 – 17:00	0	1.5	11	0
Cape Wheel	47%	53%	10:00 – 22:00	0	0.5	18	0
Zeitz MOCAA	n/a	n/a	10:00 – 18:00	0	1.5	48	0
Iziko Museums (All)	n/a	n/a	09:00 – 17:00	0	1.5		

** = Admissions data from 2018/2019 does not include membership visits*

n/a = not available or not applicable

4.8.4 Audit outcome

1. Seven iconic visitor attractions are well known worldwide. These icons cover heritage (Robben Island Museum), nature (Cape Point, Table Mountain National Park, Kirstenbosch National Botanical Gardens) and observation experiences (Table Mountain Aerial Cableway and the Flying Dutchman Funicular at Cape Point) and animal viewing (Boulders Beach).

2. Together the top attractions in Cape Town receive 5.7 million admissions. This number indicates the interest and willingness of domestic and international visitors to spend time, attention and discretionary spend on visitor attractions.

3. The majority of visitors to attractions are adult. Only the Two Oceans Aquarium (40%), The Cape Wheel (25%) and Castle of Good Hope (20%) obtain significant numbers of children as visitors.

4. Significantly, all attractions attract a high proportion of domestic visitors. Iconic visitor attractions that are often quoted as 'only for international tourists' also attract significant numbers of local visitors. Kirstenbosch National Botanical Gardens (70%), Two Oceans Aquarium (60%), Table Mountain Aerial Cableway(40%) and Cape Point (40%) are examples.

5. All attractions apart from the Norval Foundation are open seven days a week.

6. Attractions offer a range of dwell times such that visitors can combine several experiences during their stay. It should be noted, however, that dwell time on the sites does not include queuing time. Queuing time often adds significant time during high season at places such as Table Mountain Aerial Cableway and Cape Point. As tourism pressure at these sites increases and queuing time increases, the experience value decreases and will affect how many attractions tourists can visit during their time in Cape Town. There is a decreased perceived value in their stay if they are not able to visit all the iconic attractions in the Cape Metro on their list.

7. Visitor attractions can play a significant role in job creation. Attractions are open seven days a week, which requires additional staff. As tourism becomes less seasonal, it creates more permanent employment. Seasonal positions/part-time/contract jobs play an important role in that these positions can act as entry-level and training positions for first-time entrants into the job market.

8. It must be noted that Chapman's Peak Drive did not form part of this audit, but is viewed as an important visitor attraction to the Metro area.

4.8.5 Audit segmentation

Based on the audit outcome, the visitor attractions were then segmented into one of four quadrants.

Cape Metro visitor attraction segmentation is shown below in Figure 26.

Figure 26: Audit segmentation for Cape Town Metropolitan Municipality

High-quality, low visitor numbers

1. **Zeitz MOCAA** is an iconic building with the potential to become an iconic art experience; its primary challenge is lack of awareness.

2. **Norval Foundation** offers a good visitor experience which includes the outdoor sculpture garden. As with Zeitz MOCAA, it could also benefit from more marketing to improve awareness.

3. **The Cape Wheel** offers a high-quality observational experience that has relatively low visitor numbers, potentially due to lack of awareness.

4. **The art experiences of the Cape Metro area** offer a high quality of indoor and outdoor, formal and informal experiences that range in subject matter and attraction size, but they draw relatively low numbers of visitors.

Art as an attraction can provide the Cape Town Metro with an additional drawcard to view the city through a new lens, a lens that is urban and not reliant on using well-known attractions as drivers, appealing to a visitor who is looking for unexpected experiences outside the expected. Through a targeted and strategic focus, art can form part of a new tourism conversation for the Cape Town Metro, attracting new visitors and giving repeat visitors new experiences to enjoy.

High-quality experience, high visitor numbers

1. At **Table Mountain Aerial Cableway** visitor pressure is increasingly an issue. Authorities need to help expedite measures that the Table Mountain Aerial Cableway Company proposes to alleviate this, e.g. fast-track path, shuttles, monitoring the condition of Tafelberg Road as it is the single access to the site.

2. The issue of visitor pressure is also spreading across to **Signal Hill** as this site increasingly becomes an accessible observational experience. There is an opportunity to add a more formalised observational experience here.

3. **Cape Point Nature Reserve** does not have a capacity issue, but during high season it experiences unacceptable bottlenecks at the entrance gate, impacting the visitor experience and perception. Improved gate processes such as an online ticketing system can alleviate this. The platform will allow visitors to pre-purchase tickets (and combination tickets with the Flying Dutchman Funicular and Boulder's Beach). The advantages of pre-purchased tickets are that they (1) speed up the transaction time at entrance gates (2) preserve pocket power by locking visitors into visiting the attraction as they have paid upfront and (3) provide upselling opportunities, e.g. combination tickets.

4. **Groot Constantia** offers an excellent visitor experience and has capacity management under control.

5. **Kirstenbosch National Botanical Gardens** also offers a highly enjoyable visitor experience with capacity management under control.

6. **The Two Oceans Aquarium's** visitor experience delights both adults and children, with proper capacity management.

7. Although **The Flying Dutchman Funicular** offers an excellent visitor experience, there are some capacity constraints during peak periods.

Low-quality visitor experience, low visitor numbers

1. Currently, **Lookout Hill and Langa Quarter** offer a low-quality visitor experience and attract few visitors. A purpose-built visitor attraction at these sites will act as visitor nodes and hubs from where other township activities can operate.

These nodes must be built with attraction principles in mind and not start from the premise of being a visitor centre or community centre. Their primary purpose must be to offer an authentic, high-quality visitor attraction.

Low-quality visitor experience, high visitor numbers

1. The visitor experience at **Robben Island Museum** needs improvement, and it has the opportunity to increase carrying capacity. Currently, the Robben Island Gateway Museum is part museum, part ticketing office and part retail which negatively impacts the visitor experience. The focus needs to be on converting this area into a high-quality gateway with a well-designed arrival/ticketing/boarding experience to cope with capacity and weather cancellations. A substantial expansion and curation of the retail area that befits the legacy can take advantage of weather cancellations and contribute to additional income for the museum.

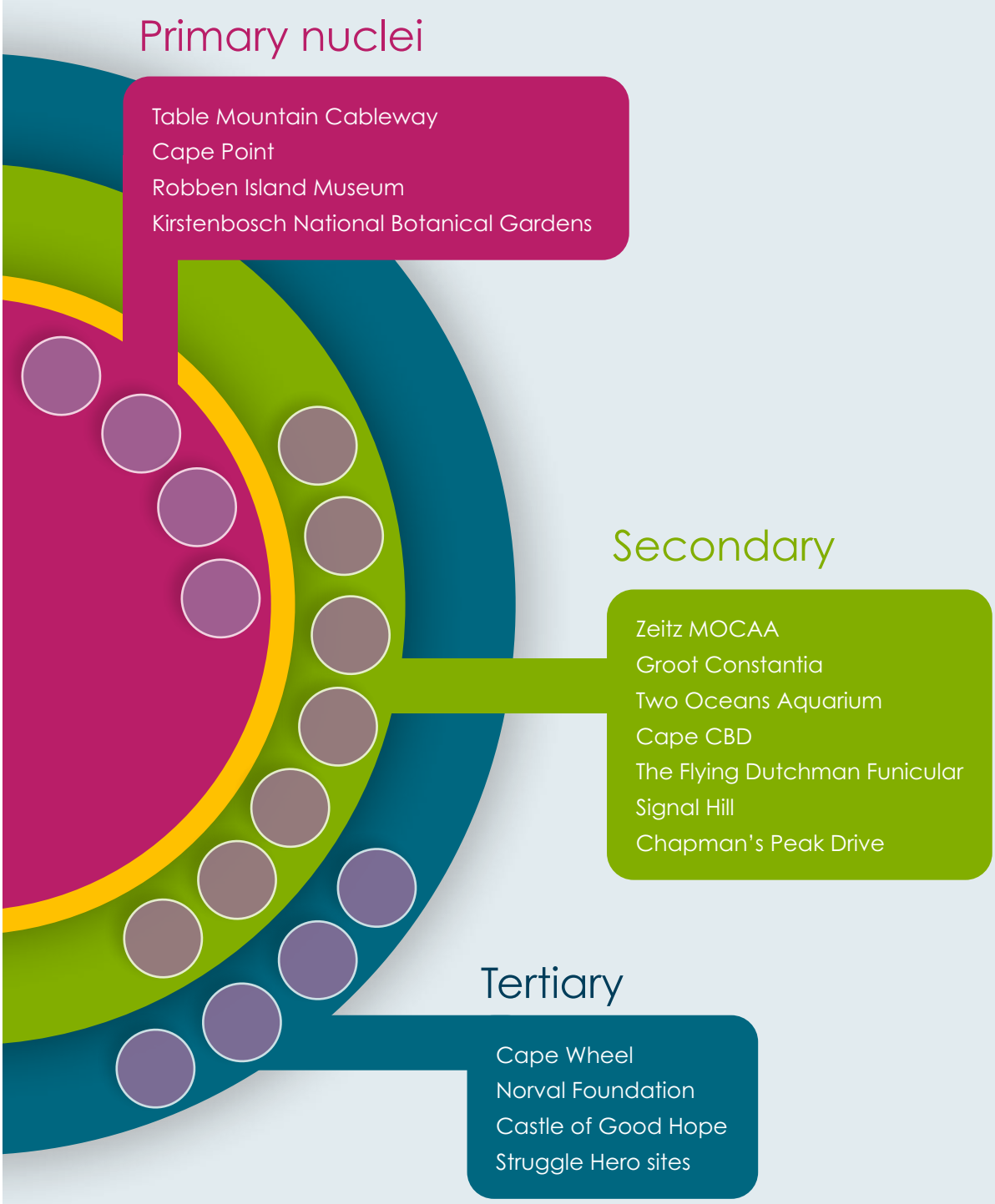
   Aside from Robben Island, there are no iconic attractions that tell the struggle hero story. There are many opportunities to highlight struggle hero sites and link them as part of a struggle hero's route, e.g. Jetty 1 at the V&A, Nobel Square at the V&A, Grande Parade and City Hall, Purple Rain March site, Arch for Arch and the Desmond and Leah Tutu Legacy Foundation Museum.

2. **The Castle of Good Hope** draws over 200 000 visitors per annum with 95% of these being domestic visitors. To attract more visitors (and increase revenue) investment into a modern heritage experience is required. This experience needs to be animated and reinterpreted to match the expectations of the international and domestic visitor.

4.8.6 Tourism nuclei

Based on the attractions audited, the tourism nuclei for the Cape Town Metropolitan Municipality can be seen in Figure 27 below.

Figure 27: Cape Town Metropolitan Municipality tourism nuclei



4.8.7 Identifying the gaps

Through the analysis of online conversations and the audit of a sample of visitor attractions, gaps and opportunities present themselves for discussion. Below is a list of gaps identified through this process.

Gap 1: An artful conversation about culture and heritage

Desired outcome	Current state	Action steps
Art, in all its forms, can be a significant tourist attraction and a catalyst for tourism distribution across the seasons and neighbourhoods of the city.	In the recent years, the Cape Metro has gained a substantial number of world-class art attractions such as the Zeitz MOCAA and the Norval Foundation.	Elevate and create art experiences with spaces such as Zeitz MOCAA, broader art routes, art galleries, graffiti tours, Iziko National Gallery and Norval Foundation to tell Cape Town's culture and heritage story.

Gap 2: Convert the Central Business District into a tourism attraction

Desired outcome	Current state	Action steps
To get visitors to see the central business district of Cape Town as an attraction.	Cape Town's Central Business District (CBD) is a walkable historic culture and heritage experience that every visitor should engage with as a highlight of their visit. It is the only city in the world that has a New 7 Wonder of Nature within its boundaries and one of few cities surrounded by a national park. Its streets are filled with hyper-local restaurants, retail shops and quirky attractions that are often only visited by locals.	Packaging of the CBD's offering to make it a must-do experience on the itinerary of every visitor to Cape Town. itinerary.

Gap 3: Our struggle heroes

Desired outcome	Current state	Action steps
To create a real and robust connection with Cape Town and the country's struggle heroes (Former President Nelson Mandela and former Archbishop Desmond Tutu) through the packaging of a broader tourism offering for the city.	Robben Island Museum is the best-known attraction and the only access to the history of the anti-apartheid struggle. Due to capacity and financial constraints, many visitors do not have access to it. Yet there are numerous sites across the city that form part of a curated experience, giving more people the opportunity to experience this story.	There are several under-utilised sites that exist to tell the Tutu and Mandela stories and the story of Apartheid in Cape Town. Elevate these sites through storytelling (e.g. Jetty 1, V&A, where prisoners left their freedom behind) and packaging.

Gap 4: Signal Hill observational experience

Desired outcome	Current state	Action steps
Signal Hill has become a flagship, if not iconic, experience in Cape Town and the formalisation of it as an attraction needs to happen to protect the site, preserve the visitor experience and provide income opportunities for relevant stakeholders.	The Signal Hil observation experience yields no income for stakeholders.	Formalisation of Signal Hill as an observational visitor experience.

Gap 5: Township tourism

Desired outcome	Current state	Action steps
An authentic visitor experience that creates a visitor economy node.	Township tourism is small and fragmented.	Building of a visitor node based on attractions principles.

4.8.8 Summary

There are many tourism opportunities available to the Cape Town Metropolitan Municipality and the industry to attract visitors and their spend; this section puts forward five suggestions. For an opportunity to be realised, not only would a partnership model between the public and private sector need to exist but a clear understanding of what barriers are in place, preventing the realisation of the opportunity (e.g. regulations) and solutions for removing these barriers must be developed and implemented.

4.9 Visitor attraction potential of the Overberg District Municipality

4.9.1 Introduction

Lying between the Cape Peninsula and the Garden Route, the Overberg District is a place that boasts excellent diversity. Made up of four local municipalities (Theewaterskloof, Overstrand, Cape Agulhas and Swellendam) it is home to Hermanus, a coastal town known as the jewel of the Cape Whale Coast for its abundance of marine wildlife. One can also stand at the southernmost tip of Africa (and the geographic meeting point of two oceans) when visiting Cape Agulhas.

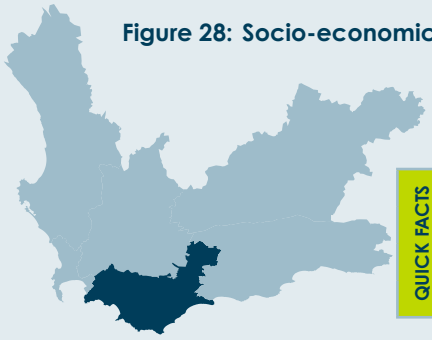
The beautiful Elgin Valley, an hour's drive from Cape Town, is an under-appreciated wine region and Swellendam, a jaw-droppingly beautiful natural wonderland, combine to create an area unlike any other.

Villiersdorp's main attraction is the Theewaterskloof Dam, established in 1978, and it is the seventh-largest dam in South Africa. The dam attracts weekend tourists who enjoy water sports such as water skiing, kite surfing and canoeing.

With a landscape dominated by gentle, undulating hills, enclosed by the ocean and foreboding mountain ranges, the Overberg District is a favourite getaway for those seeking outdoor pursuits and adventure. It also acts as a stopover en route to the Garden Route, with many international visitors stopping off at Cape Agulhas.

Figure 28 gives a socio-economic overview of the Overberg District Municipality.

Figure 28: Socio-economic overview of the Overberg District Municipality



OVERBERG DISTRICT OD

QUICK FACTS	
AREA	12 239 km²
DENSITY	21/km²
SEAT	Bredasdorp
MUNICIPALITIES	Theewaterskloof, Overstrand, Cape Agulhas, Swellendam

DEMOGRAPHICS

POPULATION
294 391
2019

NUMBER OF HOUSEHOLDS
85 119
2019

AVERAGE HOUSEHOLD INCOME
R15 217
2018

INDIGENT HOUSEHOLDS
R19 554
2019

GENDER
50.5% 49.5%

AGE COHORTS (2019)

0 – 14	15 – 64	65+
25.6%	67.3%	7.1%

GROSS DOMESTIC PRODUCT

GDPR
R20.5 billion
2018

% OF WESTERN CAPE GDPR
3.5%
2018

GDPR PER CAPITA
R72 661.40
2019

ESTIMATED GDPR GROWTH

2019	2020	2021
0.4%	-6.4%	4.3%

EMPLOYMENT

NUMBER OF EMPLOYED
133 362
2018

ESTIMATED NUMBER OF JOBS LOST
90
2019

ESTIMATED UNEMPLOYMENT RATE
10.4%
2019

TRADE

IMPORTS R1.1 | EXPORTS R2.9
R IN BILLIONS (2019)

TOP 3 EXPORT PRODUCTS (2018)

- APPLERS, PEARS & QUINCES
- MOLLUSCS
- ORIGINAL SCULPTURES

TOP 3 EXPORT DESTINATIONS

- HONG KONG
- NETHERLANDS
- MALAYSIA

TOURISM

VISITORS (2019)
OVERSEAS 58.9% | DOMESTIC 41.1%

VISITORS (2019)
OVERNIGHT 80.6% | DAY VISITORS 19.4%

TOP ACTIVITIES (2019)

- SCENIC DRIVES 44.4%
- OUTDOOR ACTIVITIES 36.7%
- CUISINE 38.2%

Soure: MERO, 2020

4.9.2 Destination positioning

As part of Tourism Blueprint 2030, a comprehensive analysis was done of what over 300 000 people were saying online about the Overberg District over the duration of one year. Insights from this data could guide strategic planning, marketing and development to enable the destination to shape the way people will talk about district in the future.

Core conversation drivers are assets and experiences that show the highest volume of conversation online and therefore have the most awareness.

1. Beaches and shorelines
2. Nature photography

The opportunity lies in promoting these tourism experiences and ensuring that visitor experiences create positive sentiment online.

Potential growth opportunities may not generate the most volume but are creating the highest sentiment and are often around niche forms of tourism, providing future growth opportunities.

1. Cycling and biking
2. Wildlife viewing (e.g. marine animals)

The opportunity for Overberg Municipality District is to look at the development of these assets and experiences to attract more visitors.

Underperforming assets that fall well below the competitive set average and drive a negative sentiment for Overberg District are:

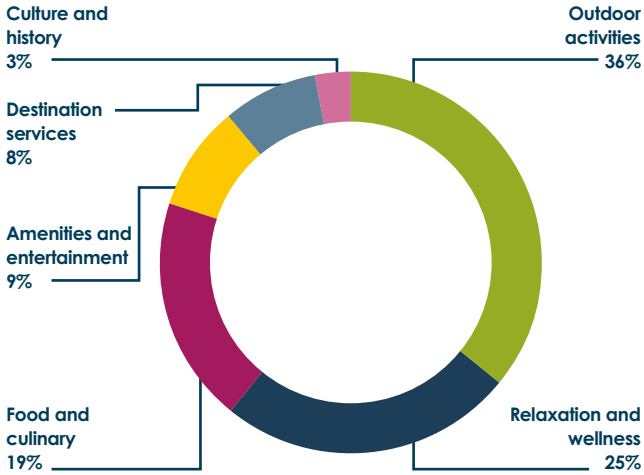
1. Diving and snorkelling
2. Museums and galleries

There is a requirement to review these activities and look for areas of improvement.

When looking at individual tourism activities (Figure 29), outdoor activities generates the highest volume of online conversations. When compared to their competitors, they scored high in terms of volume. However, the sentiment shared for these activities was average when compared to the district's competitors.

The implication thereof is that these tourism experiences themselves require enhancement. Another interesting point to note is that the volume of conversations around culture and heritage scores the lowest in terms of volume. There are several authentic heritage experiences in the area that could change conversations if developed properly. Food and culinary also offers an opportunity for the district as it receives the highest volume of conversation, but average sentiment. Food and wine is a form of tourism that continues to grow in popularity.

Figure 29: Tourism categories



Attraction	Sentiment		Volume	
	Cape Whale Coast	Comparative Performance	Cape Whale Coast	Comparative Performance
Destination Services	56	Average	6383	Average
Culture + History	26	Low	1 947	Average
Food + Culinary	54	Average	14671	Average
Relaxation + Wellness	52	Average	18927	High
Amenities + Entertainment	27	Average	7 162	Average
Outdoor Activities	52	Average	27799	High

Source: TSI, 2019

4.9.3. Tourism Attractions Audit

To get a better understanding of the current product offering in the district and identify possible gaps, an audit of 11 visitor attractions took place. Please refer to Table 7 for the audit.

Table 7: Overberg District Municipality attractions audit

Attraction	Type of attraction	Annual visitors*	Adult admission fee	Child admission fee	% Adult	% Child
Old Harbour Museum, Hermanus	Heritage	25 001 – 50 000	R20,00	R5,00	70%	30%
De Hoop Stal, De Hoop	Nature	25 001 – 50 000	R50,00	R30,00	80%	20%
Cape Nature De Hoop	Nature	25 001 – 50 000	R50,00	R30,00	94%	6%
Stony Point Penguin Colony	Animal viewing	50 001 – 100 000	R25,00	R15,00	89%	11%
Shark Diving Gansbaai (consolidated)	Animal viewing	50 001 – 100 000	R2 200,00	R2 200,00	96%	4%
Cape Agulhas	Nature	25 001 – 50 000	R43,00	R22,00	n/a	n/a
Drostdy Musuem, Swellendam	Heritage	0 – 25 000	R30,00	R10,00	80%	20%
Bontebok National Park	Nature	0 – 25 000	R43,00	R22,00	n/a	n/a
Kogelberg Nature Reserve	Nature	0 – 25 000	R50,00	R30,00	90%	10%
Harold Porter Garden	Nature	50 001 – 100 000	R30,00	R12,00	n/a	n/a
Panthera Africa, Big Cat Sanctuary	Animal viewing	0 – 25 000	R290,00	R190,00	83%	17%

Attraction	% domestic	% international	Opening times	Closed days	Dwell time (hrs)	Full Time Employees	Contract Employees
Old Harbour Museum, Hermanus	10%	90%	09:00 – 16:30	0	30 min	18	2
De Hoop Stal, De Hoop	40%	60%	07:00 – 18:00	0	2 days	70	10
Cape Nature De Hoop	99%	1%	07:00 – 18:00	0	5	n/a	n/a
Stony Point Penguin Colony	99%	1%	08:00 – 16:30	0	1	n/a	n/a
Shark Diving Gansbaai (consolidated)	10%	90%	07:00 – 13:00	0	4	n/a	n/a
Cape Agulhas	61%	39%	07:00 – 19:00	0	1	n/a	n/a
Drostdy Musuem, Swellendam	60%	40%	09:00 – 16:45	0	30 min	24	7
Bontebok National Park	67%	33%	07:00 – 18:00	0	4	n/a	n/a
Kogelberg Nature Reserve	99%	1%		0	n/a	n/a	n/a
Harold Porter Garden	n/a	n/a	08:00 – 16:30	0	n/a	30	2
Panthera Africa, Big Cat Sanctuary	72%	28%	pre-bookings only	1	2	7	2

** = Admissions data from 2018/2019*
n/a = not available or not applicable

4.9.4. Audit outcome

1. These 11 attractions in the Overberg District draw almost 400 000 visitors annually.

2. The three most-visited experiences/attractions are shark cage diving (as an aggregate of all operators); Stony Point Penguin Colony and the Harold Porter Botanical Gardens. Each receives over 60 000 visitors annually.

3. Visitors are relatively well distributed across attractions in the region with the majority receiving 20 000 plus visitors annually.

4. Swellendam, a notable historic town on the N2 highway, experiences a high volume of passing traffic. Currently, it does not have a significant attraction acting as a drawcard. At present, the historic town receives 4 500 visitors to its historical museums.

5. Attractions in the region draw primarily adult visitors, with the Old Harbour Museum in Hermanus being the only attraction to bring a significant number of children (70% adults, 30% children) compared to the other attractions audited.

6. The domestic market accounts for over 60% of visitors to the majority of the attractions. However, shark cage diving in Gansbaai and the Old Harbour Museum in Hermanus are dependent on international visitors.

7. All attractions are open seven days per week.

8. All the attractions offer an excellent range of dwell time. Visitors can enjoy up to half a day shark cage diving, and spend a shorter period at other attractions. These different dwell times ensure that visitors can add more than one attraction/experience to their visit, thereby creating a full itinerary.

9. There are no dedicated attractions and play areas designed for travellers with children.

10. The majority of attractions are nature-based.

11. Heritage based attractions can be better leveraged, e.g. Hermanus Old Harbour, Elim.

12. The region has an authentic historical observation experience, the Cape Agulhas Lighthouse.

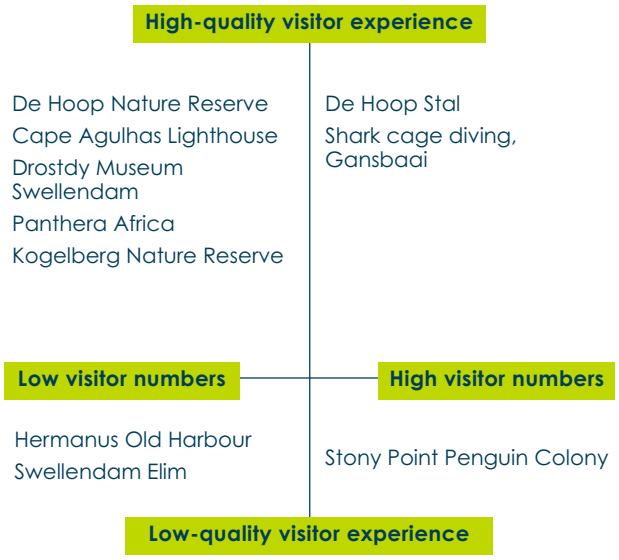
13. The majority of attractions have entry fees of R50 or under during the research period (September 2019), making it well priced for the domestic market.

4.9.5. Audit segmentation

Based on the audit outcome, the visitor attractions were then segmented into one of four quadrants.

Overberg District visitor attraction segmentation is shown below in Figure 30.

Figure 30: Audit segmentation for Overberg District Municipality



High-quality, low visitor numbers

1. **De Hoop Nature Reserve** offers a high-quality experience but has low visitor numbers due to the capacity constraints of the Whale Trail.

2. **Cape Agulhas Lighthouse** offers a pleasant experience with high international appeal, but visitor numbers are low compared to what other sites in the region receive. The experience should aim to draw as many visitors as Stony Point and Gansbaai shark cage diving.

3. **The Drostdy Museum in Swellendam** is a good quality historical and cultural experience yet has low visitor numbers.

4. **Bontebok National Park and Kogelberg Nature Reserve** receive primarily domestic tourists and, based on the high-quality experience they offer, should receive many more visitors.

5. **Panthera Africa** has low visitor numbers which may be a function of awareness of the attraction.

High-quality experience, high visitor numbers

1. **De Hoop Stal** offers a high-quality experience with a range of activities and experiences.

2. **Shark cage diving, Gansbaai** attracts a good number of visitors, particularly considering that this is a seasonal activity.

3. **Harold Porter Botanical Garden** is a high-quality experience with relatively high visitor numbers.

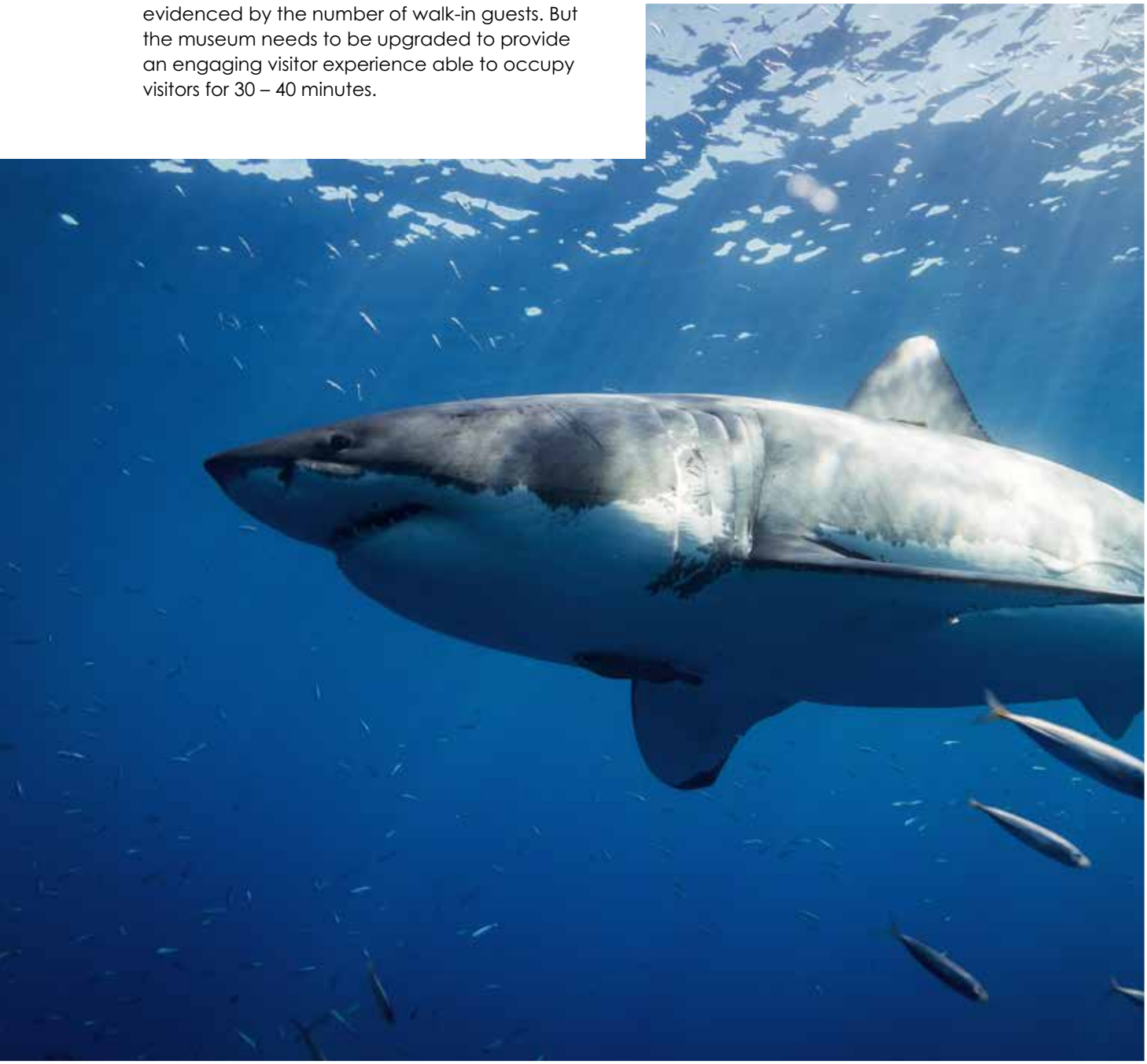
Low-quality experience, low visitor numbers

1. **Hermanus's Old Harbour** and surrounding museums are of interest to travellers as is evidenced by the number of walk-in guests. But the museum needs to be upgraded to provide an engaging visitor experience able to occupy visitors for 30 – 40 minutes.

2. While **Elim** is an authentic and charming heritage village, the village currently has no infrastructure for tourism. It is an ideal stop on the Cape Whale Coast route to Agulhas but needs to create a compelling reason to visit.

Low-quality experience, high visitor numbers

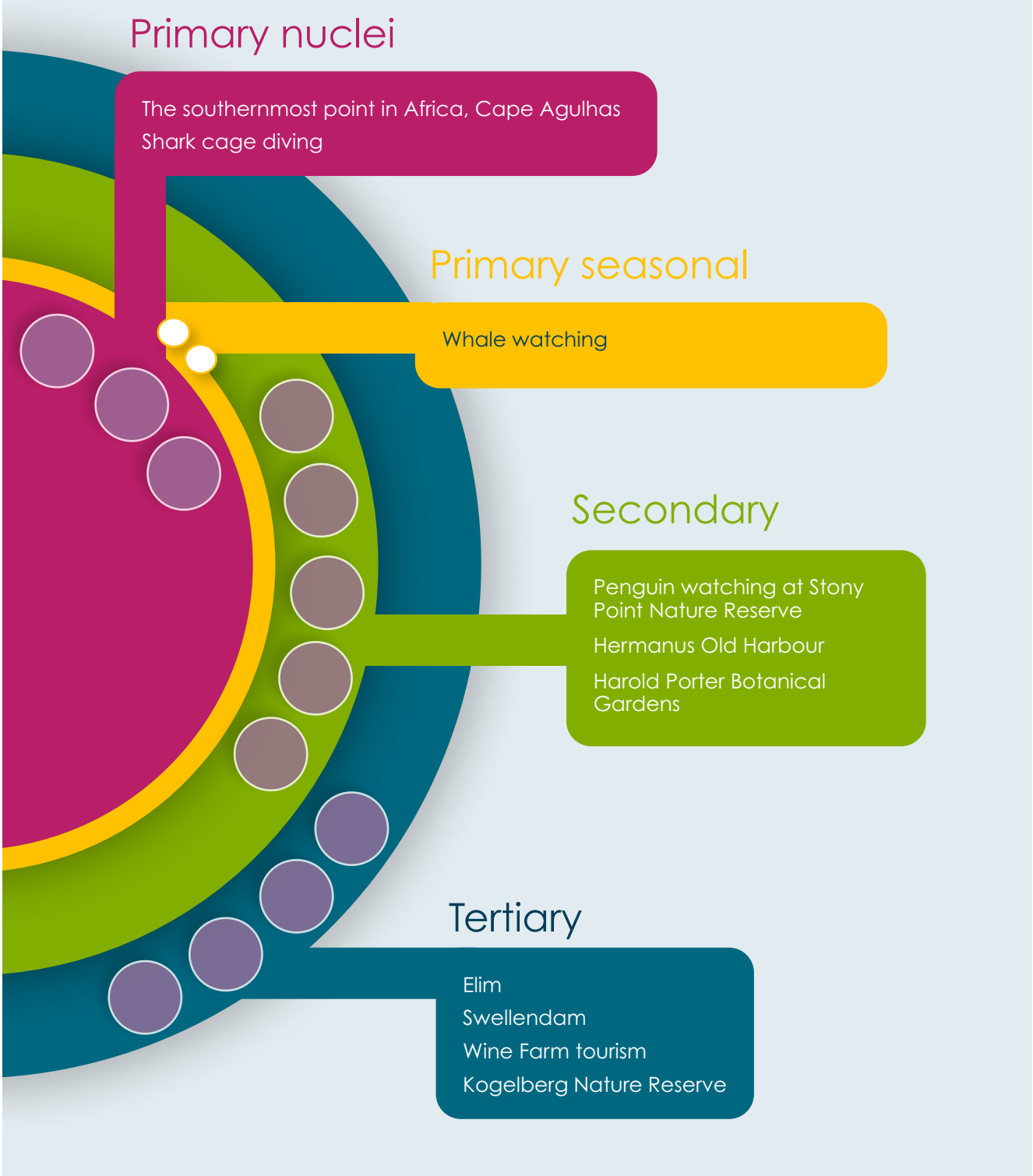
1. **Stony Point Penguin Colony** home of the African penguin can become a significant drawcard to the region. The site has the potential to increase visitor numbers significantly and will need the infrastructure to support this.



4.9.6.Tourism nuclei

Based on the attractions audited, the tourism nuclei for the Overberg Municipal District can be seen in Figure 31 below.

Figure 31: Overberg Municipal District tourism nuclei



4.9.7 Identifying the gaps

Through the analysis of online conversations and the audit of a sample of visitor attractions, gaps and opportunities present themselves for discussion.

To attract visitors all year round and ensure geographic spread across the coastal and inland areas, investment and promotion by both the public and private sectors need to centre around its hyper-local and distinguishing offerings.

There are several secondary nuclei attractions that with the right investment and marketing can become primary nuclei, e.g. Stony Point Penguin Colony, Hermanus Old Harbour and Harold Porter Botanical Gardens.

Considering the age profile currently attracted to the Overberg District (36 years and over) attractions that wish to act as drawcards and grow this market need to:

1. Appeal to this age bracket
2. Include cuisine and wine tasting experiences
3. Generate an itinerary that includes half-day visits and a combination of high-quality short stay (under two hours) attractions that draw visitors to the region

Below is a list of suggestions based on gaps and opportunities presented.

Gap 1: Hiking

Desired outcome	Current state	Action steps
Capture the popularity of hiking, particularly amongst 41 – 60 year olds from key Europe and North America markets.	The current offering appeals mainly to the domestic market. It does not cater enough to the international visitors who need access to companies with local knowledge, ability to hire and transport gear and provide their sustenance and transportation.	Support local businesses to provide world-class service to visitors wanting to do hiking holidays.

Gap 2: Marine sea-life viewing

Desired outcome	Current state	Action steps
To convert existing marine viewing experiences into a year-round drawcard.	The district has several well-placed points for visitors to see a collection of rare marine animals. However, these view points are seasonal.	Rare and endangered marine life such as abalone, penguins, whales and sharks can become significant drawcard experiences unique to the region and accessible to families of all ages. Examples include: • Upgrade the Whale Museum in Hermanus to provide excellent all year round museum experience • Create a shark viewing experience that can be accessed all year round on land • Link a culinary experience with a sustainable tourism message at the abalone farms • Develop a science tourism offering

Gap 3: Hyperlocal gastronomy

Desired outcome	Current state	Action steps
Make Clarence Drive a world-famous, hyperlocal gastronomy route and gateway to the Koggelberg region.	Many good food experiences can be found in the Overberg District, yet none are unique drawcards to the region and memorable in their setting or food quality.	Package Clarence Drive as a hyper-local gastronomy route. Provide support to businesses along the route around the development of this offering.

Gap 4: Culture and heritage experiences

Desired outcome	Current state	Action steps
Create high-quality cultural and heritage experiences to act as stopping off points and link areas, pulling visitors further into the region, e.g. linking Gansbaai and Cape Agulhas	There are several unique and authentic heritage experiences in the area, e.g. Elim and Hermanus' Old Harbour, but they are of a poor quality.	The district has a number of authentic, well-placed heritage attractions but these are of a poor quality and need to provide modern museum experiences that can act as a pull factor for the over 35-year-old tourism market that is the region's predominant visitor. • Elim needs a compelling reason to stop and become market ready. Walking tours and a good coffee shop can encourage people to stop for an hour or two. • Cape Agulhas Lighthouse to develop an Insta-grammable viewpoint. • Swellendam can reposition itself from a coffee stop on the N2 to a family destination for domestic visitors offering child-friendly play activities.

4.9.8 Summary

There are many tourism opportunities available to the Overberg District Municipality and the industry to attract visitors and their spend; this section has put forward four suggestions. For an opportunity to be realised, not only would a partnership model between the public and private sectors need to exist but a clear understanding of what barriers are in place preventing the realisation of the opportunity (e.g. regulations) and solutions for removing these barriers would need to be developed.

The Overberg District Municipality can package and market its uniqueness through the lens of hyperlocal gastronomy experiences. Eating fish and chips at one of the local harbours can become a bucket list activity. Abalone tasting can attract the highly desirable Asian market, and fynbos-based gastronomical experiences paired with locally produced wines can become endemic to the region.

The region also provides a unique opportunity to view rare and endangered marine life not easily accessible elsewhere in the world.

Abalone, jackass penguins, whales and great whites are all significant marine viewing drawcards that can appeal to international and domestic visitors. These experiences can be accessible all year round.

The heritage sites of the region do not offer a highly desirable visitor experience at present. With carefully curated upgrades, they can act as further drawcards.

4.10 Visitor attraction potential of the West Coast District Municipality

4.10.1 Introduction

Stretching from Blaauwberg in the south to Kliprand in the north, the West Coast District comprises 44 small towns along the southwestern coast of the Western Cape. It lays claim to a variety of unique experiences, and the region is well known for its turquoise ocean, rugged coastline, farmlands and world-renowned annual wildflowers.

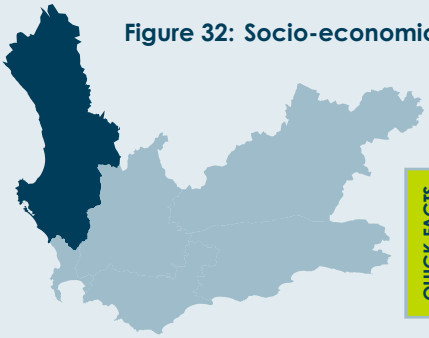
The West Coast District is easily accessible from Cape Town, starting just 20 minutes outside of the central business district. The R27 is its primary access route and passes many of the top visitor attractions, most of which are within a two-hour drive of Cape Town.

Visitors to the West Coast can also choose to take the N7 highway, better known as the Cape Namibia route. The route connects Cape Town and Namibia and goes through the incredibly beautiful but often overlooked Swartland.

The Swartland wine region is only an hour and a half drive from Cape Town, making it an ideal getaway for enthusiastic lovers of wine seeking a difference. The Swartland has gained global recognition as the home to the most innovative approaches to making wine. The district offers well-established wine and olive routes that focus around the Malmesbury and Riebeek Kasteel areas.

Figure 32 gives the socio-economic overview of the district.

Figure 32: Socio-economic overview of the West Coast District Municipality



WEST COAST DISTRICT (WCD)

QUICK FACTS	
AREA	31 118 km²
DENSITY	13/km²
SEAT	Moorreesburg
MUNICIPALITIES	Matzikama, Cederberg, Bergrivier, Saldanha Bay, Swartland

DEMOGRAPHICS

POPULATION
456 052
2019

NUMBER OF HOUSEHOLDS
118 891
2019

AVERAGE HOUSEHOLD INCOME
R14 928
2018

INDIGENT HOUSEHOLDS
23 631
2019

GENDER
49.4% 50.6%

AGE COHORTS (2019)

0 – 14	15 – 64	65+
26.4%	68.6%	5.0%

GROSS DOMESTIC PRODUCT

GDPR
R30.5 billion
2018

% OF WESTERN CAPE GDPR
5.2%
2018

GDPR PER CAPITA
R68 685.60
2019

ESTIMATED GDPR GROWTH

2019	2020	2021
-1.2%	-4.6%	3.2%

EMPLOYMENT

NUMBER OF EMPLOYED
183 969
2018

ESTIMATED NUMBER OF JOBS LOST
389
2019

ESTIMATED UNEMPLOYMENT RATE
11.9%
2019

TRADE

IMPORTS R3.0 | EXPORTS R6.4
R IN BILLIONS (2019)

TOP 3 EXPORT PRODUCTS (209)

- IRON/NON ALLOY – NOT CLAD ETC.
- IRON/NON ALLOY – CLAD, PLATED ETC.
- CITRUS FRUIT

TOP 3 EXPORT DESTINATIONS

- KENYA
- UNITED STATES
- TANZANIA

TOURISM

VISITORS (2019)
OVERSEAS 22.7% | DOMESTIC 77.3%

VISITORS (2019)
OVERNIGHT 38.3% | DAY VISITORS 61.7%

TOP ACTIVITIES (2018)

SCENIC DRIVES	CUISINE	CULTURE/HERITAGE
24.4%	15.3%	16.5%

Soure: MERO, 2020

4.10.2 Destination positioning

As part of Tourism Blueprint 2030, a comprehensive analysis was done of what more than 300 000 people were saying online about the West Coast District over the duration of one year. Insights from this data could guide strategic planning, marketing and development to enable the destination to shape the way people will talk about this district in the future.

Core conversation drivers are assets and experiences that show the highest volume of conversation online and therefore have the most awareness. These drivers are for:

1. Beaches and shorelines
2. Nature photography
3. Restaurants

The opportunity lies in marketing these extensively to attract more visitors, and to ensure that the visitor experiences generate positive online sentiment.

Potential growth opportunities may not generate the most volume but are creating the highest sentiment and are often around niche forms of tourism, providing future growth opportunities.

1. Sky diving/bungi jumping and ziplining
2. Weddings

The opportunity for West Coast District Muncipality is to look at the development of these assets and experiences to attract more visitors.

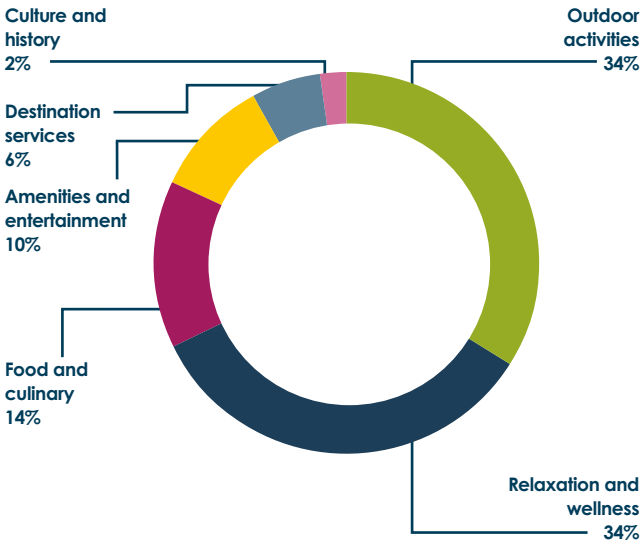
Underperforming assets that fell well below the competitive set average and therefore could drive a negative sentiment for West Coast District are:

1. Festivals and events
2. Camping

There is a requirement to review these activities and look for areas of improvement.

When looking at individual tourism activities (Figure 33), outdoor activities and relaxation and wellness generate the highest volume of online conversations. When compared to their competitors, they scored high in terms of volume. However, the sentiment shared for these activities was average when compared to the district's competitors. The deduction that can be made is that the experience may need improvement.

Figure 33: Tourism categories



Attraction	Sentiment		Volume	
	Paternoster	Comparative Performance	Paternoster	Comparative Performance
Outdoor Activities	49	Average	2324	Average
Culture + History	37	Average	142	Average
Destination Services	56	Average	385	Average
Relaxation + Wellness	57	Average	2289	Average
Amenities + Entertainment	22	Low	660	High
Food + Culinary	58	Average	963	Average

Source: TSI, 2019

4.10.3. Tourism attractions audit

To get a better understanding of the current product offering in the district and identify possible gaps, an audit of nine visitor attractions took place.

Table 8: West Coast District Municipality attractions audit

Attraction	Type of attraction	Annual visitors*	Adult admission fee	% Adult	% Child
!Khwa ttu	Culural/ Heritage	0 – 25 000	No entry fee, R180 per tour	70%	30%
West Coast Fossil Park	Culural/ Heritage	0 – 25 000	R100,00	46%	54%
West Coast National Park	Nature	250 001 – 500 000	R83,00	90%	10%
Bird Island Lamberts Bay	Nature	0 – 25 000	R50,00	91%	9%
Cederberg Wilderness Area	Nature	0 – 25 000	R70,00	92%	8%
Thali Thali Game Lodge	Animal based activity	0 – 25 000	R300,00	50%	50%
Buffelsfontein Game Park	Animal based activity	25 001 – 50 000	R400,00	70%	30%
Darling Brew	Gastronomical	0 – 25 000	R55,00	75%	25%
Darling Olives	Gastronomical	0 – 25 000	R40,00	n/a	n/a

Attraction	% domestic	% international	Opening times	Closed days	Dwell time (hrs)	Full Time Employees	Contract Employees
!Khwa ttu	75%	25%	09:00 – 17:00	0	3,5	32	10
West Coast Fossil Park	89%	11%	08:00 – 17:00	0	2	15	5
West Coast National Park	n/a	n/a	08:00 – 18:00	0	4	n/a	n/a
Bird Island Lamberts Bay	99%	1%	07:30 – 18:00	0	2	n/a	n/a
Cederberg Wilderness Area	99%	1%	open access	0	8	n/a	n/a
Thali Thali Game Lodge	50%	50%	09:00 – 21:00	0	5	18	2
Buffelsfontein Game Park	30%	70%	08:00 – 17:00	0	3	25	5
Darling Brew	85%	15%	10:00 – 17:00	0	1,5	5	25
Darling Olives	n/a	n/a	09:00 – 16:00	1	1	3	0

* = Admissions data from 2018/2019

4.10.4 Audit outcome

1. The attractions audited draw 470 000 visitors annually. The West Coast National Park attracted 309 000 visitors, accounting for 65% of annual arrivals to the region in 2018.

2. The West Coast National Park receives most of their visitors during the spring flower season.

3. Most attractions draw mainly adults as visitors. West Coast Fossil Park brings a mix of adults and children.

4. There are no attractions that act as huge drawcards for children.

5. Many of the visitors to the attractions are domestic visitors (aside from the game parks).

6. The primary visitor attractions in the region are all open daily.

7. Dwell time on site is high, with most attractions occupying visitors for upwards of two hours. This dwell time is appropriate for a region that currently mainly draws day visitors. Time needs to be allocated for driving to and from the

destination. People need to commit to leaving home. Attractions need to offer enough to fill two hours, but not too much. This type of approach allows visitors the opportunity to create a leisurely day which includes the drive to and from the attraction as well as perhaps a second attraction and/or a cuisine experience. If attractions offer too little (e.g. a 30 minute experience) it is not deemed worth a trip.

8. All attractions are open seven days a week.

9. There are few targeted activity experiences; most activities offered are specialist experiences and are self-managed (e.g. kitesurfing).

10. Aside from the game farm activities, entry fees are under R100. Note: SANParks has a dual pricing system in place for West Coast National Park.

4.10.5 Audit segmentation

Based on the audit outcome, the visitor attractions were segmented into one of four quadrants.

West Coast District Municipality visitor attraction segmentation is shown below in Figure 34.

Figure 34: Audit segmentation for West Coast District Municipality

High-quality experience, low visitor numbers

1. **!Khwa ttu** offers an excellent quality of experience that is unique, hyperlocal and suitable for all ages. It needs more significant marketing input to create awareness and encourage people to allocate time to the experience.

2. **Bird Island** in Lamberts Bay offers an elevated platform to view the gannet colony. It is suitable for children and adults and with investment, it can become an Instagrammable viewing deck, drawing more visitors.

3. **Darling Olives** is a niche tasting experience with charm and should be attracting more visitors.

4. **The Cederberg Wilderness Area** offers an authentic wilderness experience and should be attracting more visitors.

High-quality of experience, high visitor numbers

1. The **West Coast National Park** acts as a flagship park to this district, but only during the West Coast flower season. A well-curated experience can serve as flagship stop and drawcard outside of the flower season.

2. **Darling Brew** offers an authentic local artisanal brew experience with an excellent children's play area.

Low-quality of experience, low visitor numbers

3. **Buffelsfontein Game Park and Thali Thali** offer visitors an opportunity for game viewing close to Cape Town. International visitors frequent them. These sites need to focus on providing a day tour that matches other high-quality game experiences in South Africa.

4. **The West Coast Fossil Park** is unique and impressive with regards the scale of visible fossils. The focus needs to be on creating a holistic visitor experience that connects the visitor centre and the fossil site. Visitor experience to the fossil site does not match that of the high-quality visitor centre. Marketing input is required to increase visitors, mainly as it is suitable and of interest to families of young children.

Low-quality of experience, high visitor numbers

There are no attractions in this quadrant.

4.10.6 Tourism nuclei

Based on the attractions audited, the tourism nuclei for the West Coast Municipal District can be seen in Figure 35 below.

Figure 35: West Coast Municipal District tourism nuclei.

4.10.7 Identifying the gaps

Through the analysis of online conversations and the audit of a sample of visitor attractions, gaps and opportunities present themselves for discussion.

To attract visitors all year round and ensure geographic spread across the coastal and inland areas, investment and promotion by both the public and private sectors needs to centre around its hyper-local and distinguishing offerings.

To attract visitors throughout the year to the West Coast District, investment and promotion of attractions that have a strong brand, are unique, have shown longevity and have a strong enough value proposition that they can be recognised nationally will be necessary. This approach will help develop a tourism node that has a pull value for the West Coast District. The spin-off of increased visitor numbers will filter through to the smaller attractions and experiences.

Below is a list of suggestions based on gaps and opportunities presented.

Gap 1: Natural attractions

Desired outcome	Current state	Action steps
For the parks in the district to appeal to the new generation tourist by providing a more compelling reason to visit.	From shoreline to mountainous areas, the region offers a mecca for adventure sports lovers but seasonality impacts these nature-based activities which attract and appeal to both international and domestic tourists, including the younger generation.	Create a visually arresting and highly instagrammable reason to stop that will draw tourists up the R27, through the park and on to Langebaan throughout the year. The experience needs to be curated and appeal to families, giving them a reason to slow down and stop. There is also an opportunity to create geographical spread by drawing visitors further up the West Coast to Bird Island in Lamberts Bay. The site has several animal/bird viewing observation experiences but receives a relatively low number of tourists. Expanding the tourist experience and improving the site will increase dwell time and create added reasons to travel further up the West Coast.

Gap 2: Heritage attractions

Desired outcome	Current state	Action steps
The West Coast has two distinct, unique heritage sites – West Coast Fossil Park and !Khwa ttu San Heritage that can gain national recognition and increase their visitor numbers.	Each of these appeal to all ages of tourists. The Artists Journey, which is part of the Cradle of Human Culture Route (www.cradleofhumanculture.co.za), connects these two attractions with other attractions of cultural importance in the region.	More marketing to improve awareness of these attractions, along with enhancements around the visitor experience.

Gap 3: Purpose-built gastronomical attractions

Desired outcome	Current state	Action steps
Gastronomical experiences that are unique to the region, easily accessible and provide food experiences to suit all budgets, ages and time frames.	The region offers unique gastronomical products such as rooibos tea, fresh fish, citrus fruit, bokkoms and roosterkoek as well as traditional South African padstals. These padstals offer gastronomical experiences unique to the region. But these gastronomical attractions are difficult to access and are not showcased in a consistent and meaningful way.	Highlighting the strandveld culinary experience that is unique to the region as a bucket list experience. Surprisingly, there are very few culinary experiences in South Africa that showcase the traditional use of an open fire (braai), e.g. the Argentinian chef, Francis Mallmann, has made a career and created a successful chain of open fire restaurants that showcase the culinary experience of cooking over an open fire.

4.10.8 Summary

There are many tourism opportunities available to the West District Municipality and the industry to attract visitors and their spend; this section has put forward three suggestions. For an opportunity to be realised, not only would a partnership model between the public and private sectors need to exist but a clear understanding of what barriers are in place preventing the realisation of the opportunity (e.g. regulations) and solutions from removing these barriers would need to be developed.

1. The sound arterial road system, the R27 and N7 draws visitors to most of the region's attractions, and can assist in driving geographic spread and broaden the appeal of the district.

2. Rather than a single dominant tourist site in the district, the opportunity exists to create and highlight a range of experiences that form a narrative about the uniqueness of the West Coast District.

3. The international interest in Wolfgat restaurant can be used to showcase the food from the West Coast. There is an opportunity to leverage off the uniqueness of West Coast hyperlocal food experiences such as rooibos tea, roosterkoek and seafood. The trend is toward local unique food experiences and the region offers a wide range of restaurants to meet this trend (e.g. Strandloper).

4. Many small attractions clutter the offering, and too few are of a high enough standard to act as unique drawcards.

5. Amplify hyper-local cultural heritage experiences. !Khwa ttu is a unique, high quality, family-friendly experience centred around San heritage.

6. Opportunities exist to invest in an observational experience – that attracts visitors of all ages and is open all year round. This experience could be ideal as a vantage point during the flower season. West Coast National Park and Bird Island would be two sites suitable for this.

7. The Swartland area, Darling and Riebeeck Valley provide a range of high-quality gastronomic experiences and could become nodes for gastro-tourism.

8. There is an opportunity to provide attractions that offer activities and safe play areas geared toward children.

4.11 Visitor attraction potential of the Central Karoo District Municipality

But the truth is the Karoo is bigger than this. The Karoo region spans across 101 towns and four provinces of South Africa: the Northern Cape, Eastern Cape, Western Cape and Free State.

Figure 36 provides a socio-economic overview of the Central Karoo Municipal District.

4.11.1 Introduction

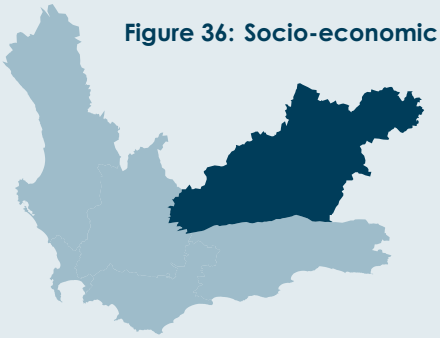
Known for its wide-open spaces, the Karoo is where you want to go when you wnat to escape the of city life. The Karoo is where you go to get off the grid.

A place of incredible beauty, wild game, clear skies and magical sunsets, the Karoo has several nature reserves and game farms, boasting an abundance of wildlife. The Karoo National Park, for example, is home to black rhino, lions and other wild game.

Another animal in abundance in the Karoo is sheep, who roam 'freely' around the area on large plots of land, sampling a wide range of indigenous, aromatic plants. As a result, the Karoo has become famous for its delicious and tasty lamb dishes.

The N1 highway is a significant point of access for the district, but it is also an invitation to speed through the region. The region's tourism bureaus currently lack the coordination and resources to market the Central Karoo brand, its routes and attractions, which is a significant drawback for tourism development (CKDM Tourism development and masterplan, June 2019).

Figure 36: Socio-economic overview of the Central Karoo District Municipality



CENTRAL KAROO DISTRICT (CKD)

QUICK FACTS	
AREA	38 854 km²
DENSITY	1.8/km²
SEAT	Beaufort West
MUNICIPALITIES	Laingsburg, Prince Albert, Beaufort West

DEMOGRAPHICS

POPULATION: 74 662 (2019)

NUMBER OF HOUSEHOLDS: 19 342 (2019)

AVERAGE HOUSEHOLD INCOME: R13 013 (2019)

INDIGENT HOUSEHOLDS: 8 210 (2019)

GENDER: 47.3% | 52.7%

AGE COHORTS (2019)

0 – 14	15 – 64	65+
29.5%	61.7%	8.8%

GROSS DOMESTIC PRODUCT

GDPR: R3.1 billion (2018)

% OF WESTERN CAPE GDPR: 0.5% (2018)

GDPR PER CAPITA: R42 758 (2019)

ESTIMATED GDPR GROWTH

2019	2020	2021
-1.2%	-4.0%	1.0%

EMPLOYMENT

NUMBER OF EMPLOYED: 19 322 (2018)

ESTIMATED NUMBER OF JOBS CREATED: 34 (2019)

ESTIMATED UNEMPLOYMENT RATE: 22.0% (2018)

TRADE

IMPORTS: R16.3 | EXPORTS: R67.4

R IN BILLIONS (2019)

TOP 3 EXPORT PRODUCTS (2018): WHEY, BUTTERMILK, MILK & CREAM

TOP 3 EXPORT DESTINATIONS: NAMIBIA, ZAMBIA, GERMANY

TOURISM

VISITORS (2018): OVERSEAS 7.5% | DOMESTIC 92.5%

VISITORS (2018): OVERNIGHT 34.1% | DAY VISITORS 65.9%

TOP ACTIVITIES (2018)

CULTURE/HERITAGE	CRAFTS/FOOD MARKETS	KAROO LAMB
67.6%	22.0%	19.6%

Soure: MERO, 2020

4.11.2 Destination positioning

As part of Tourism Blueprint 2030, a comprehensive analysis of #karoo on Instagram was done to understand how online users were talking about and visually showing the district.

The #karoo boasts over 156 000 posts on Instagram (March 2020) and a review of these posts as shown in Figure 37 all align with how the region positions itself from a tourism perspective; one dominated by imagery of wildlife, scenic landscape photography and road trips.

The Karoo (which is Khoisan for 'dry, hard, thirsty land') is a unique arid zone and considered a wonder of the scientific world. The Karoo boasts the richest diversity of succulents (over 9 000 species) and the greatest variety of land tortoises on the planet. The Karoo also has the Western Cape's most extensive collection of San (Bushman) rock art. The Karoo is a place of the purest night skies, the most spectacular dawn breaks and breath-taking sunsets (www.southafrica.com).

4.11.3 Tourism attraction audit

To get a better understanding of the current product offering in the district and identify possible opportunities to stimulate demand, an audit of five attractions took place. Please refer to Table 9 for the audit.

Figure 37: #karoo Instagram

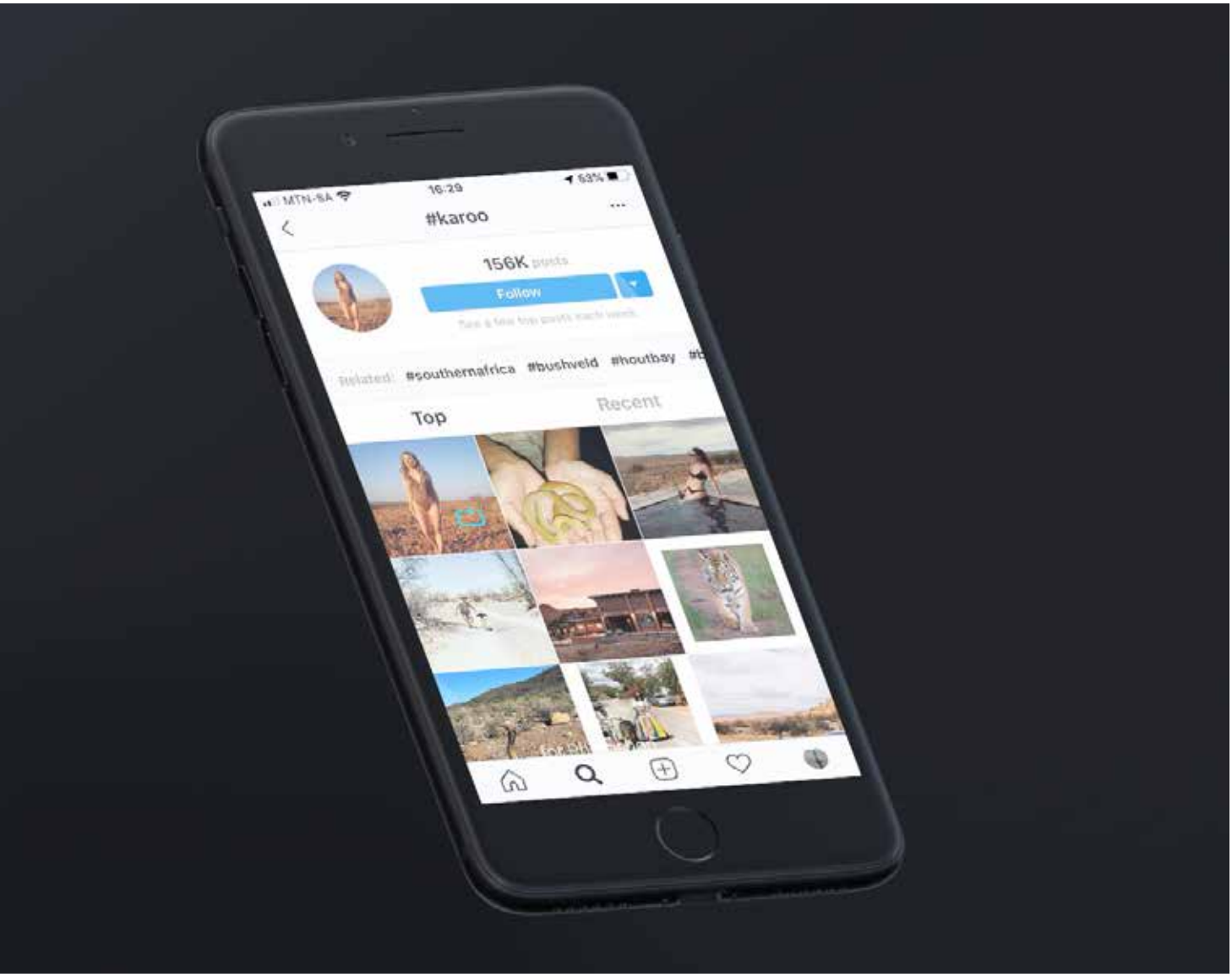


Table 9: Central Karoo District Municipality attractions audit

Attraction	Type of attraction	Annual visitors*	Adult admission fee	Child admission fee	% Adult	% Child
Karoo National Park	Nature	25 001- 50 000			n/a	n/a
Anysberg Nature Reserve	Nature	0 – 25 000	R50	R30	94%	6%
Beaufort West Museum	Culural/ Heritage	0 – 25 000	R25	R15	80%	20%
Matjiesfontein Day Visits	Culural/ Heritage	not available				
Swartberg Circle Route	Culural/ Heritage	not available				

Attraction	% domestic	% international	Opening times	Closed days	Dwell time (hrs)	Full time	Contract Employees
Karoo National Park	90%	10%	05:00 – 22:00	0		n/a	n/a
Anysberg Nature Reserve	99%	1%	07:30 – 17:00	0	2 nights	n/a	n/a
Beaufort West Museum	50%	50%	07:45 – 16:30	1	40 min		
Matjiesfontein Day Visits							
Swartberg Circle Route							

** = Admission data from 2018/2019 and does not include membership visits*
n/a = not available or not applicable

4.11.4 Audit outcome

1. The lack of formal visitor attractions in the district was highly noticeable.

2. Many of the popular attractions (e.g. Matjiesfontein, Swartberg Circle Route) did not have enough data on hand to assist in making strategic business decisions.

3. In the MERO 2020 report it was stated that the top activity undertaken in the district by tourists was to experience culture and heritage; it is notable that there are no culture and heritage attractions as significant drawcards.

4. The Beaufort West Museum, although only attracting a handful of visitors, attracted an equal proportion of foreign and domestic visitors. These numbers are an indication of the interest in the heritage experience.

Figure 38: Audit segmentation for Central Karoo District Municipality

4.11.5 Audit segmentation

Based on the audit outcome, the visitor attractions were segmented into one of four quadrants.

Central Karoo visitor attraction segmentation is shown in Figure 38.

High-quality experience, low visitor numbers

1. The historic and magnificently preserved heritage village of **Matjiesfontein** provides an authentic, immersive experience that can be engaged with for a short road break or more extended afternoon and stay over. Unfortunately, no data is available as to the number of day visitors that pass through, but this village should be an iconic stop for all tourists on the N1.

2. The **Swartberg Circle Route** is a spectacular scenic drive with multiple access points which can rival any scenic drive in the country. Unfortunately, there is no data as to the number of tourists accessing this route.

3. **Anysberg Nature Reserve** offers an excellent nature experience; low visitor numbers are as a consequence of accommodation constraints.

High-quality experience, high visitor numbers

Karoo National Park is a high-quality nature experience including the world's first fossil braille trail, but visitor numbers are relatively low.

Low visitor numbers, low quality of experience

The museum experiences in the region such as the (1) **Beaufort West Museum** and the (2) **Laingsburg Flood Museum** draw small visitor numbers due to the dated subject matter and poor museum presentation.

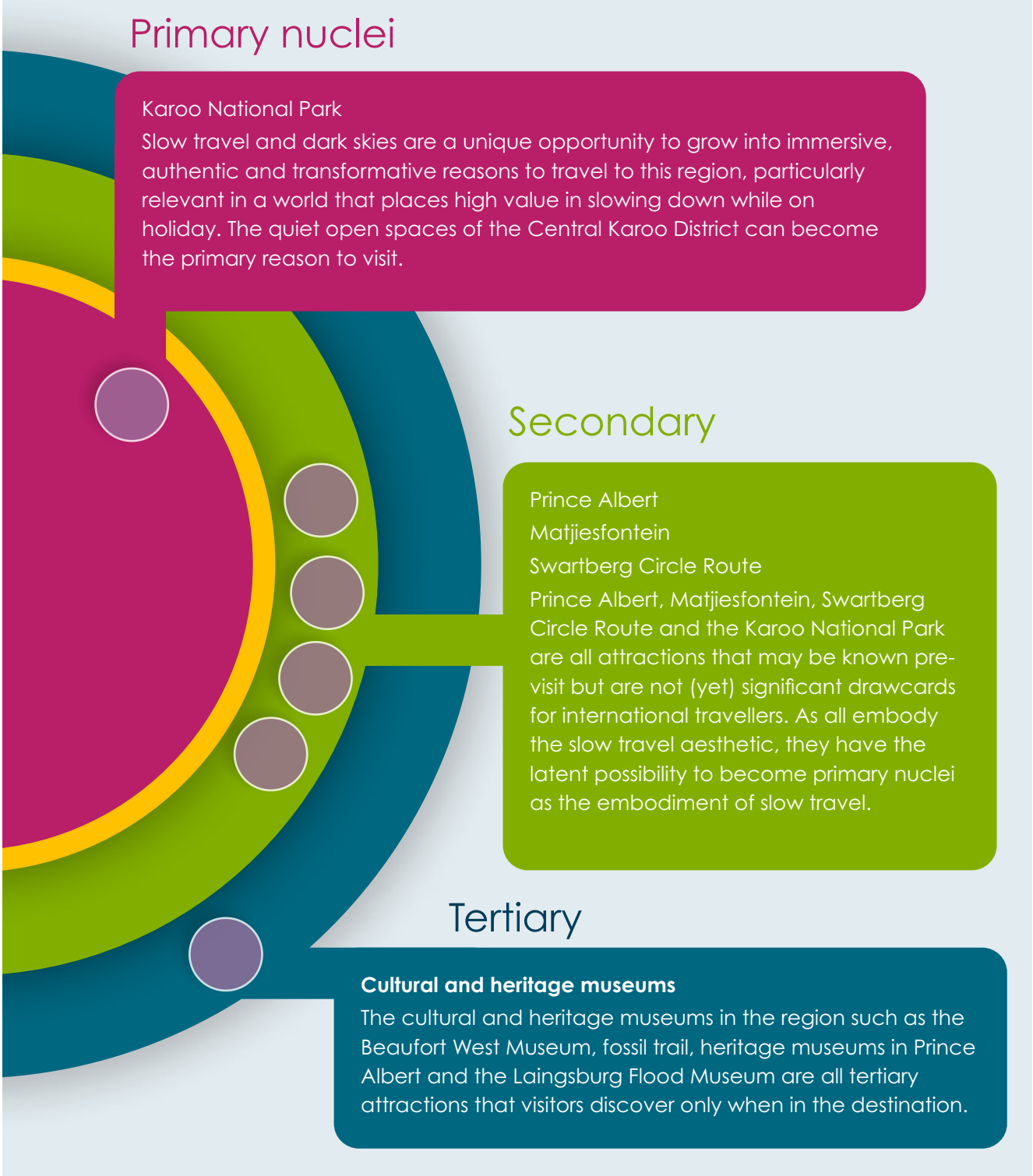
High visitor numbers, low quality of experience

There are no attractions that fall into this category.

4.11.6 Tourism Nuclei

Based on the attractions audited, the tourism nuclei for the Central Karoo Municipal District can be seen in Figure 39 below.

Figure 39: Central Karoo Municipal District tourism nuclei.



4.11.7 Identifying the gaps

Through the analysis of online conversations and the audit of a sample of tourist attractions, gaps and opportunities present themselves for discussion.

To attract visitors all year round and ensure geographic spread across the district, investment and promotion by both the public and private sectors needs to centre around its hyperlocal and distinguishing offerings.

Gap 1: The N1 highway

Desired outcome	Current state	Action steps
To attract visitors throughout the year the Central Karoo needs to move from a stop-over en route to a destination and become a pivotal part of the holiday.	'Drive thru' holidaymakers race through the Central Karoo en route to their destination.	The Central Karoo will need to package the opportunities available along the N1 and its surrounding areas into a concept that is highly marketable and relevant to foreign and domestic tourists.

Gap 2: Natural attractions

Desired outcome	Current state	Action steps
Astro tourism as a niche offering can also be a vehicle for sustainable tourism development in the sparsely inhabited Central Karoo District.	The Central Karoo's biggest asset is its dark, expansive skies, but these are not being leveraged enough for tourism.	Marketing and product development.

Gap 3: Knowledge

Desired outcome	Current state	Action steps
An ability to make data informed decisions to direct tourism investment.	There is no visitor or economic data for sites that are assumed to be significant attractions for the region.	Data project.

Gap 4: Scenic routes

Desired outcome	Current state	Action steps
The Swartberg Circle Route can become known as one of the most magnificent scenic drives in the world.	The unknown route takes you on a scenic and exciting drive offering a wide range of scenery, adventure and culinary delights. Tourists can go from Oudtshoorn or Calitzdorp to De Rust, Klaarstroom and Prince Albert, over the Swartberg Pass and through Meiringspoort. The trip may be started at any of the four towns and travelled in either a clockwise or anti-clockwise direction. The picturesque back routes include Oudemuragie, Vergelegen, Lategansvlei, Groenfontein, Kruisrivier and Langverwaght (www.swartbergcircleroute.co.za).	Dedicated consumer and trade marketing campaign.

Gap 5: Iconic visitor attraction

Desired outcome	Current state	Action steps
An arresting interactive land art installation could provide an iconic Instagrammable image of the Central Karoo, raising its profile and encouraging people to stop and interact with it.	There is no single iconic image of a Karoo attraction. The poorly presented small heritage attractions that exist provided dated subject matter, e.g. Beaufort West Museum and Laingsburg Flood Museum. The open spaces of the Karoo provide an ideal backdrop for iconic site-specific land art.	Investment into a land art installation and marketing thereof to raise awareness, e.g. Seven Magic Mountains (2016), a large-scale desert artwork in Nevada, draws 1 000 people per day.

Gap 6: Matjiesfontein

Desired outcome	Current state	Action steps
Increased visitor dwell time to Matjiesfoentein will result in increased visitor spend on food and beverages and make it one of the most instagrammable villages in South Africa.	The historic and picturesque village of Matjiesfontein trades on its faded past. Matjiesfontein has the chance to become the most Instagrammable village in South Africa.	Curation of Matjiesfontein through the lens of a visitor attraction.

4.11.8 Summary

There are many tourism opportunities available to the Central Karoo District Municipality and the industry to attract visitors and their spend; this section has put forward six suggestions. For an opportunity to be realised, not only would a partnership model between the public and private sectors need to exist but a clear understanding of what barriers are in place preventing the realisation of the opportunity (e.g. regulations) and solutions from removing these barriers would need to be developed.

The Central Karoo offers an increasingly rare opportunity to see dark skies (stars), open roads and broad horizons. What is required is appropriate 'hooks' to encourage tourists to explore off the N1 and linger for a little longer. These hooks can be achieved with a few site-specific and site-appropriate attractions.

The Swartberg Circle Route provides an opportunity to create a road trip that includes scenic mountain passes, iconic art in the desert, and the very famous and photogenic Matjiesfontein. Combine the astro-tourism with the stillness of the vast Central Karoo and there's a strong reason to stay and not just pass through.

A systematic approach to data collection would be required to understand the current traveller stopping points and to benchmark and plan for future attractions.

4.12 Visitor attraction potential of the Garden Route District

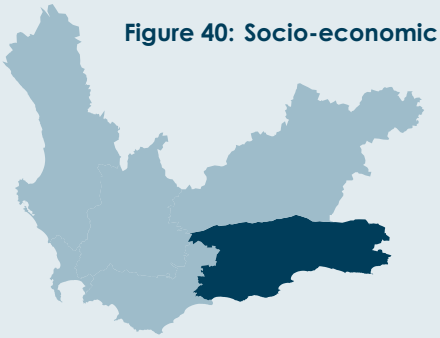
4.12.1 Introduction

The Garden Route District is one of the most beautiful, diverse and awe-inspiring parts of South Africa. Stretching from Witsand to Plettenberg Bay, around to Oudtshoorn and including Calitzdorp and Ladismith on the world-renowned Route 62, this is a place where adventure lies around every corner.

The Garden Route District consists of seven municipalities, namely Kannaland, Hessequa, Oudtshoorn, Mossel Bay, George, Knysna and Bitou.

Kannaland and Oudtshoorn municipalities form what is often called the Klein Karoo. It is the area past the forested slopes of the Outeniqua Mountains. Although a drier area, it is one of the most diverse parts of the Western Cape. In the south west, there are the Langeberg mountains and the Swartberg mountains in the north separating it from the Central Karoo District. The world-famous Route 62 transverses the Klein Karoo. Figure 40 gives a socio-economic overview of the Garden Route District Municipality.

Figure 40: Socio-economic overview of the Garden Route District Municipality



GARDEN ROUTE DISTRICT GRD

QUICK FACTS	
AREA	23 331 km²
DENSITY	25/km²
SEAT	George
MUNICIPALITIES	George, Mossel Bay, Kannaland, Hessequa, Oudtshoorn, Bitou, Knysna

DEMOGRAPHICS

POPULATION
616 034
2019

NUMBER OF HOUSEHOLDS
173 223
2019

AVERAGE HOUSEHOLD INCOME
R17 613
2019

INDIGENT HOUSEHOLDS
51 491
2019

GENDER
47.8% 52.2%

AGE COHORTS (2019)

0 – 14	15 – 64	65+
26.1%	65.1%	8.8%

GROSS DOMESTIC PRODUCT

GDPR
R44.7 billion
2018

% OF WESTERN CAPE GDPR
7.6%
2018

GDPR PER CAPITA
R75 486.50
2018

ESTIMATED GDPR GROWTH

2019e	2020	2021
0.4%	-6.6%	3.9%

EMPLOYMENT

NUMBER OF EMPLOYED
233 012
2018

ESTIMATED NUMBER OF JOBS LOST
1 163
2019

ESTIMATED UNEMPLOYMENT RATE
15.6%
2019

TRADE

IMPORTS R1.6 | EXPORTS R3.6
R IN BILLIONS (2019)

TOP 3 EXPORT PRODUCTS (2019)

CITRUS FRUIT
PREPARED LEATHER
SEEDS, FRUIT & SPORES

TOP 3 EXPORT DESTINATIONS

ITALY
AUSTRALIA
TAIWAN

TOURISM

VISITORS (2019)

OVERSEAS 48.4% | DOMESTIC 51.6%

VISITORS (2019)

OVERNIGHT 78.6% | DAY VISITORS 21.4%

TOP ACTIVITIES (2019)

CULTURE/HERITAGE 14.9%
SCENIC DRIVES 22.2%
OUTDOOR ACTIVITIES 14.7%

Soure: MERO, 2020

4.12.2 Destination positioning

As part of Tourism Blueprint 2030, a comprehensive analysis was done of what over 300 000 people were saying online about the Garden Route District over the duration of one year. Insights from this data could guide strategic planning, marketing and development to enable the destination to shape the way people will talk about the district in the future.

Core conversation drivers are assets and experiences that show the highest volume of conversation online and therefore have the most awareness. These drivers and are:

1. Beaches and shorelines
2. Nature photography
3. Festivals and events
4. Restaurants

The opportunity lies in marketing these extensively to attract visitors. It is important to ensure that these experiences generate positive online sentiment.

Potential growth opportunities may not generate the most volume but are creating the highest sentiment and are often around niche forms of tourism, providing future growth opportunities.

1. Motorsports and motor cycles
2. Wildlife viewing
3. Fishing

The opportunity for the Garden Route District Municipality is to look at the development of these assets and experiences to attract more visitors.

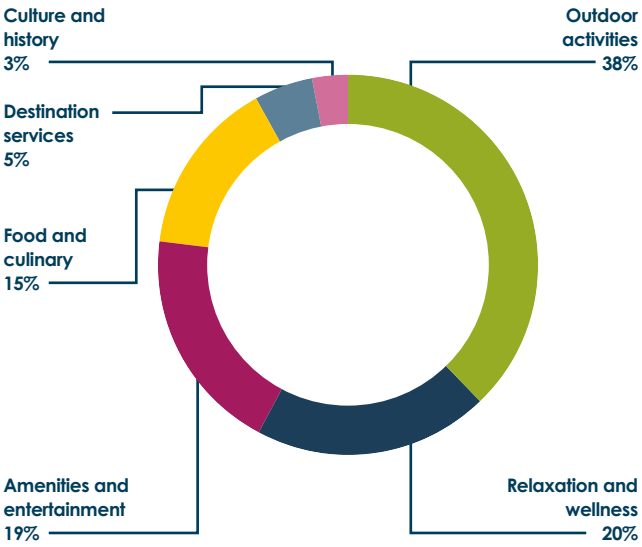
Underperforming assets that fell well below the competitive set average and therefore, could drive a negative sentiment for the Garden Route District are:

1. Museums and galleries
2. Surfing

There is a requirement to review these activities and look for areas of improvement.

When looking at individual tourism activities (Figure 41), outdoor /adventure activities received by far the highest volume of conversations for the Garden Route District, but the volume and sentiment for this was average when compared to its competitive set. The deduction that can be made is that the experience may need improvement to generate more conversations and better sentiment compared to its competitors.

Figure 41: Tourism categories



Source: tsi, 2019

Attraction	Sentiment		Volume	
	Knysna	Comparative Performance	Knysna	Comparative Performance
Destination Services	56	Average	2298	Average
Relaxation + Wellness	48	Average	8711	Average
Outdoor Activities	43	Average	16628	Average
Culture + History	38	Average	842	Average
Amenities + Entertainment	27	Average	8204	High
Food + Culinary	49	Average	6721	Average

4.12.3 Tourism attractions audit

To get a better understanding of the current product offering in the district and identify possible opportunities to stimulate demand, an audit of 18 attractions took place. Please refer to Table 10 for the audit.

Table 10: Garden Route District Municipality attractions audit

Attraction	Type of attraction	Annual visitors*	Adult admission fee	Child admission fee	% Adult	% Child
Featherbed Bay Eco Experience	Nature	not available	R499	R116	n/a	n/a
Ocean Odyssey	Nature, animal	0 – 25 000	R720 – R910	R760	91%	19%
Garden Route National Park, day viistors	Nature	250 001 – 500 000	R59 – R235	R30 -R118	n/a	n/a
Birds of Eden	Nature, animal	100 001 – 250 000	R260	R130	50%	50%
Monkeyland	Nature, animal	100 001 – 250 000	R260	R130	50%	50%
Tenikwa	Nature, animal	100 001 – 250 000	R260	R130	50%	50%
Robberg Peninsula	Nature	0 – 25 000	R50	R30	85%	15%
Red Berry Farm	Farm park	not available	free, pay for activities		n/a	n/a
Radical Raptors	Nature animal	0 – 25 000	R160	R120	60%	40%
Klein Karoo						
Cango Wildlife Ranch	Animal based	100 001 – 250 000	R180	R135	70%	30%
Cango Caves	Heritage	250 001 – 500 000	R150	R100	n/a	n/a
CP Nel Museum	Heritage	0 – 25 000	R25	R5	n/a	n/a
Safari Ostrich Farm	Animal based	not available	R146	R73	n/a	n/a
Cango Ostrich Farm	Animal based	not available	R120	R65	n/a	n/a
Chandelier Game & Ostrich	Animal based	not available	R50 – R500	n/a	n/a	n/a
Highgate Ostrich Show Farm	Animal based	not available	R187	R121	n/a	n/a
Buffelsdrif	Animal based	25 001 – 50 000	R385-R920	R190 – R460	85%	15%
Zipline Cango	Activity	not available	R330	R330	n/a	n/a

Attraction	% domestic	% international	Opening times	Closed days	Dwell time (hrs)	Full Time Employees	Contract Employees
Featherbed Bay Eco Experience	n/a	n/a	08:30 – 17:30	0	3	n/a	n/a
Ocean Odyssey	19%	81%	08:00 – 17:00	0	2	n/a	n/a
Garden Route National Park, day viistors	48%	52%	08:00 – 17:00	0	n/a	n/a	n/a
Birds of Eden	50%	50%	08:00 – 17:00	0	1 hr 15 min	*120 staff across all 3 sites	
Monkeyland	50%	50%	08:00 – 17:00	0	1 hr 15 min		
Tenikwa	50%	50%	09:00 – 16:00	0	2		
Robberg Peninsula	99%	1%	08:00 – 18:00	0	2	n/a	n/a
Red Berry Farm	n/a	n/a	09:00 – 16:00	1	n/a	n/a	n/a
Radical Raptors	50%	50%	09:00 – 17:00	0	1	4	0
Klein Karoo							
Cango Wildlife Ranch	60%	40%	08:30 – 17:00	0	2	85	42
Cango Caves	35%	65%	09:00 – 16:00	0	2	36	3
CP Nel Museum	64%	36%	09:00 – 17:00	1.5	40 min	12	0
Safari Ostrich Farm	n/a	n/a	08:30 – 17:15	0	1	n/a	n/a
Cango Ostrich Farm	n/a	n/a	08:00 – 17:15	0	45 min	n/a	n/a
Chandelier Game & Ostrich	n/a	n/a	08:00 – 17:15	0	1 – 2 hours	n/a	n/a
Highgate Ostrich Show Farm	n/a	n/a	08:00 – 17:15	0		n/a	n/a
Buffelsdrif	30%	70%	08:00 – 18:00	0	4	20	1
Zipline Cango	n/a	n/a	09:00 – 16:30	0	45 min	14	4

** = Admissions data from 2018/2019*

n/a = not available or not applicable

4.12.4 Tourism attractions audit outcome

1. The **Cango Caves** provides a benchmark for most attractions in the district in terms of visitor numbers and attracts over 250 000 visitors per annum.

2. The **Garden Route National Park**, which has several entry points, attracts over 400 000 day visitors per annum.

3. Many attractions in the district see over 100 000 predominately domestic tourists and provide child-friendly activities.

4. Admission fees for popular attractions are all over R150.

5. SANParks is the only attraction in the district with a dual pricing strategy. Conservation fees per day (adult) are R59 for South African citizens and R235 for international visitors. SADEC rates are also available.

6. The district offers a wide range of outdoor activities, animal encounters and child-friendly experiences.

7. All major sites are open seven days a week.

8. Attractions have the right mix of local and international visitors with the majority being reliant on domestic travellers.

9. Attractions offer an excellent range of dwell time, allowing visitors the opportunity to enjoy more than one attraction a day.

4.12.5 Audit segmentation

Based on the audit outcome, the visitor attractions were segmented into one of four quadrants.

Garden Route District visitor attraction segmentation is shown below in Figure 42.

Figure 42: Audit segmentation for Garden Route District Municipality

High quality, low visitor numbers

1. **Robberg Peninsula** offers a scenically stunning walk with rich cultural heritage. This site provides trails and swims for the whole family and has the opportunity to become a must-do family activity on the Garden Route.

2. The **Red Berry Farm** is one of the few examples of farm parks in South Africa, offering a range of safe play areas and activities for families and high-quality strawberry inspired food options.

High-quality experience, high visitor numbers

1. **Birds of Eden; Monkeyland Primate Sanctuary and Tenikwa Wildlife** all offer a high-quality visitor experience with knowledgeable guides.

2. **Featherbed Co** has taken the time after the fire to reinvest in their visitor experience resulting in a high-quality offering.

3. **Buffesldrif Game Lodge** offers a range of experiences for the day visitor.

Low-quality experience, high visitor numbers

1. The **CP Nel Museum** needs to focus on providing a distilled and curated history of Oudtshoorn and the ostrich industry to enhance the visitor experience and attract more visitors.

2. The **Heritage walk through Oudtshoorn** is a self-guided walk through Oudtshoorn and requires more significant and in-depth signage. A genuine feather palace experience does not exist for the traveller and few if any feather places are open for viewing in the town.

Low-quality experience, high visitor numbers

1. The **Cango Caves** is an iconic attraction in the district, but more could be done to improve the visitor experience and extend dwell time. Through the utilisation of a dynamic pricing strategy, ticket yield can be increased.

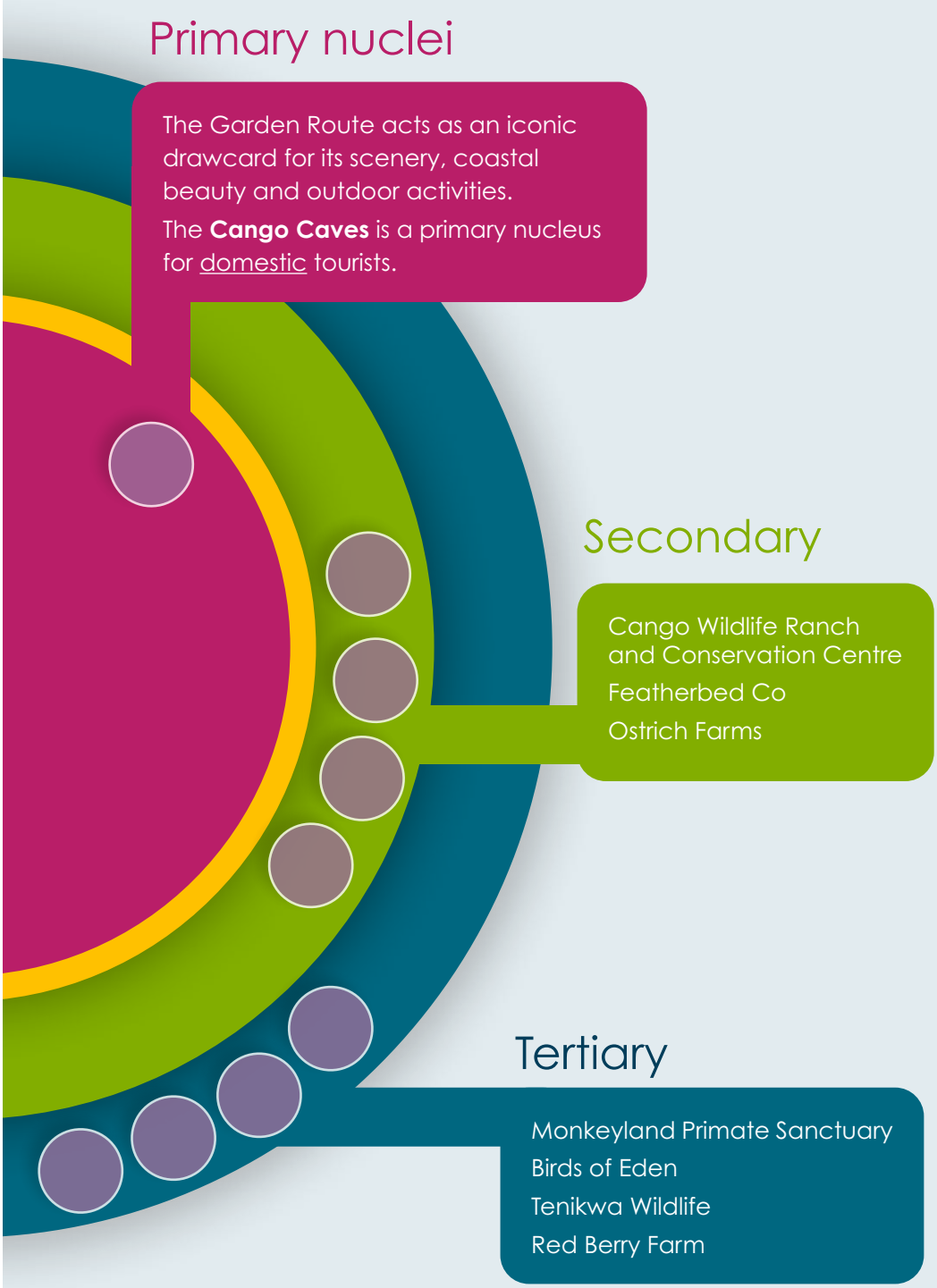
2. The **Cango Wildlife Ranch and Conservation Centre** offers a low-quality visitor experience but attracts a high number of visitors. Improvements to the visitor experience can be made.

3. The **Ostrich show farms** are well-established attractions. But the offerings are dated and retail offerings can be improved.

4.12.6 Tourism nuclei

Based on the attractions audited, the tourism nuclei for the Garden Route Municipal District can be seen in Figure 43 below.

Figure 43: Garden Route Municipal District tourism nuclei.



4.12.7 Identifying the gaps

Through the analysis of online conversations and the audit of a sample of visitor attractions, gaps and opportunities present themselves for discussion. Below is a list of gaps identified through this process.

Gap 1: Connecting neighbours through scenic drives

Desired outcome	Current state	Action steps
The Swartberg Circle route can become known as one of the great scenic drives in the world.	The relatively unknown scenic Swartberg Circle route that links the Central Karoo to the Klein Karoo is South Africa's oldest pass. The 23.8km Swartberg Pass is also a national monument, dotted with historical points of interest offering a traveller a never-ending set of inspiring views.	Dedicated trade and consumer marketing campaign.

Gap 2: Maximising revenue at the Cango Caves

Desired outcome	Current state	Action steps
Maximisation of yield for the Cango Caves.	The Cango Caves are a major attraction in the district, but the maximising of ticket yield is not happening.	A revitalisation of the visitor experience and visitor journey will attract more visitors at a higher yield. However, it is crucial to protect the caves from the negative impact increased visitor numbers will have. Human respiration generates elevated levels of CO_2, which can negatively impact the caves' geology. Visitor needs must be carefully balanced with environmental concerns to protect the cave system for future generations. Actions include: • Implementing a visitor experience analysis project to look at methods to optimise dwell time, ticket yield, secondary spend and other income streams. • Research and implement ways to maximise income while managing capacity constraints. These could include: · Variable pricing to shift demand into off-peak times and maximise yield in high demand times. · The average visitor spends two hours on-site, of which one hour is on the cave tour. The additional hour on-site offers a unique and valuable opportunity to create secondary spend.

Gap 3: Oudtshoorn heritage and culture

Desired outcome	Current state	Action steps
An enhanced culture and heritage experience to meet visitor needs.	There is a gap in the existing museum and culture and heritage offering, e.g. there is no access to feather palaces in Oudtshoorn. The opportunity exists to improve museums and cultural and heritage assets for local development and to add to the tourist experience.	1. The feather palaces of Oudtshoorn stand out for all to see. With their unique architectural style, they were once a show of opulence; today there is very little information available on them and even less access to them. The C.P Nel Museum does hold an excellent gallery of photos on them. Research needs to assess the viability of the feather palace experience and the potential to develop it into an artisanal food hall that showcases the hyperlocal gastronomy of the region. Artisanal food from the area includes olives, wine, ostrich products, dried fruit and cheese. 2. The centre of heritage in Oudtshoorn is a small walkable nucleus providing the opportunity to create an educational route for visitors to enjoy. The current heritage route has poor signage with no historical information boards outside each site. This lack of information leaves visitors unsure of what they are looking at, and some noteworthy sites, such as Foster House, are not visible from the street. 3. The C.P. Nel Museum, situated in a feather palace, celebrates the role of the ostrich trade and houses several exhibitions, including a synagogue. It is the only feather boom period house open for the general public. There is a need to edit and curate the experience into a more comprehensive historical view of the town.

Gap 4: Animal encounters

Desired outcome	Current state	Action steps
There is an opportunity for the Garden Route District to lead and ensure that all animal experiences are ethical and approved by the relevant body governing ethical animal interaction.	There are many sites in the Garden Route District that have animal interactions. The sentiment by both local and international visitors towards animal interactions is changing. Hand feeding, petting, riding, walking or swimming with animals and performing animals are all becoming unacceptable animal encounters. Experiences and attractions that rely on animal interactions to attract visitors need to urgently consider how to change their practices in line with global animal encounter ethics.	Attractions and experiences with both domestic and wild animals will always be popular, particularly as the world becomes more urbanised, and visitors have less contact with animals in their ordinary lives. Attractions involving animal encounters will need to evolve swiftly to meet the new standards on ethical interaction with wild and domestic animals.

Gap 5: Farm parks

Desired outcome	Current state	Action steps
To develop and position farm parks along the Garden Route (e.g. Red Berry Farm and the ostrich farms) as visitor attractions, mainly for the domestic market.	The Red Berry Farm and the ostrich show farms have the potential to grow and attract more visitors to the region.	Farm parks can range from small attractions offering agricultural experiences to farmers' markets with activities for children and can grow to full agricultural attractions. Farm attractions provide a fun and educational day out for families. They can become a significant attraction for the district, particularly for the domestic tourism market. There is an opportunity for local farm parks to learn from similar attractions worldwide that have been on the farm-to-attraction journey.

Gap 6: Active outdoor experiences (adventure tourism)

Desired outcome	Current state	Action steps
To brand the Garden Route District as the active-outdoor region of the Western Cape.	There is a global trend towards active forms of entertainment. The Garden Route District has several adventure tourism products that can be optimised, and the landscape is ideal for developing it further.	Coordination of existing adventure tourism products and investment and development in adventure parks could be possible action steps. The adventure parks can offer highly active elements that include zip-lining, rope obstacle courses, active observation towers, e.g. tree canopy viewing sites, and water sports. These types of parks offer a highly social environment suitable for families and active outdoor tourists.

4.12.8 Summary

There are many tourism opportunities available to the Garden Route District Municipality and the industry to attract visitors and their spend; this section has put forward six suggestions. For an opportunity to be realised, not only would a partnership model between the public and private sectors need to exist but a clear understanding of what barriers are in place preventing the realisation of the opportunity (e.g. regulations) and solutions from removing these barriers would need to be developed.

The Garden Route District Municipality has a wide range of visitor attractions embedded in nature and attractive to the adventurous of spirit. There is a need to connect these experiences into one cohesive offering and destination brand.

The region is popular with domestic tourists and their young families; farm parks are an ideal attraction for this market. The Cango Caves is an iconic regional attraction but needs to manage capacity constraints and improve ticket yield to generate income for re-investment into the experience. The Swartberg Circle Route can become an iconic self-drive route connecting several small towns within the Central Karoo and Garden Route.

Attractions that rely on animal encounters will need to align their practices with global animal encounter ethics.

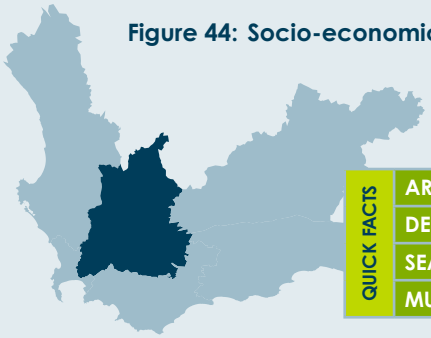
4.13 Visitor attraction potential of the Cape Winelands District Municipality

4.13.1 Introduction

The Western Cape is a place known for its abundance of quality wine and the Cape Winelands, in particular, is intrinsically tied to the vine. The district is overflowing with award-winning vintages and home to several world-class restaurants and culture sites of historic importance.

Figure 44 gives a socio-economic overview of the Cape Winelands District Municipality.

Figure 44: Socio-economic overview of the Cape Winelands District Municipality



CAPE WINELANDS DISTRICT (CWD)

QUICK FACTS	
AREA	21 473 km²
DENSITY	37/km²
SEAT	Worcester
MUNICIPALITIES	Witzenberg, Drakenstein, Stellenbosch, Breede Valley, Langeberg

DEMOGRAPHICS

POPULATION
926 619
2019

NUMBER OF HOUSEHOLDS
244 011
2019

AVERAGE HOUSEHOLD INCOME
R17 770
2018

INDIGENT HOUSEHOLDS
48 621
2019

GENDER
49.3% 50.7%

AGE COHORTS (2019)

0 – 14	15 – 64	65+
25.5%	69.0%	5.6%

GROSS DOMESTIC PRODUCT

GDPR
R67.5 billion
2018

% OF WESTERN CAPE GDPR
11.4%
2018

GDPR PER CAPITA
R75 723.80
2018

ESTIMATED GDPR GROWTH

2019	2020	2021
0.1%	-6.1%	40%

EMPLOYMENT

NUMBER OF EMPLOYED
395 426
2018

ESTIMATED NUMBER OF JOBS CREATED
751
2018

ESTIMATED UNEMPLOYMENT RATE
10.7%
2019

TRADE

IMPORTS R36.6 | EXPORTS R28.3
R IN BILLIONS (2019)

TOP 3 EXPORT PRODUCTS (2019)
WINE
CITRUS FRUIT
GRAPES

TOP 3 EXPORT DESTINATIONS (2019)
NETHERLANDS
UNITED KINGDOM
NAMIBIA

TOURISM

VISITORS (2019)
OVERSEAS 42.9% | DOMESTIC 57.1%

VISITORS (2019)
OVERNIGHT 22.6% | DAY VISITORS 77.4%

TOP ACTIVITIES (2019)

WINE TASTING	OUTDOOR ACTIVITIES	CULTURE/HERITAGE
13.6%	9.7%	15.6%

Soure: MERO, 2020

4.13.2 Destination positioning

As part of Tourism Blueprint 2030, a comprehensive analysis was done of what over 300 000 people were saying online about the Cape Winelands over the period of one year. Insights from this data could guide strategic planning, marketing and development to enable the destination to shape the way people will talk about it in the future.

Core conversation drivers are assets and experiences that show the highest volume of conversation online and therefore have the most awareness, but not necessarily the highest sentiment. These drivers for the Cape Winelands are:

1. Restaurants
2. Wineries and wine tasting
3. Nature photography

The opportunity lies in improving the tourism experience around these activities.

Potential growth opportunities may not generate the most volume but are creating the highest sentiment and are often around niche forms of tourism.

1. Tours
2. Festivals and events
3. Weddings

The opportunity for the Cape Winelands is to look at the development of these assets and experiences to attract more visitors.

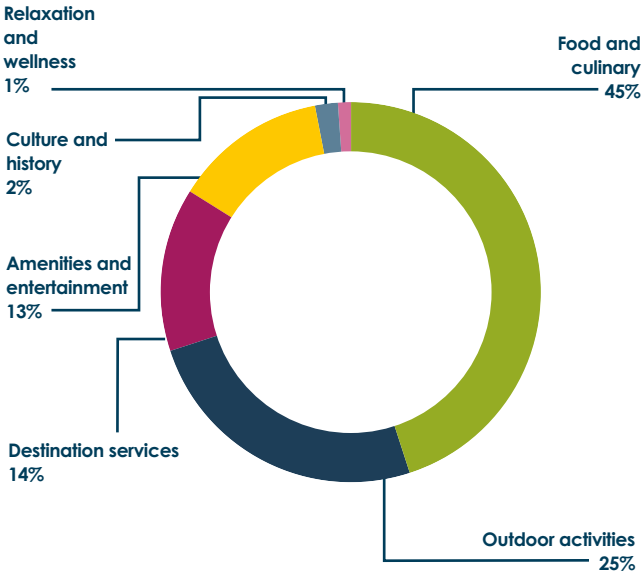
Underperforming assets that fell well below the competitive set average and therefore could drive a negative sentiment for the Cape Winelands are:

1. Conventions
2. Museums and galleries

There is a requirement to review these activities and look for areas of improvement.

When looking at individual tourism activities (Figure 45), food and culinary, and outdoor activities generate the highest volume of online conversations. When compared to their competitors, they scored high in terms of volume. However, the sentiment shared for these activities was average when compared to the Cape Winelands competitors. Relaxation and wellness scored low on volume, but high in sentiment.

Figure 45: Tourism categories



Source: TSI, 2019

Attraction	Sentiment		Volume	
	Stellenbosch	Comparative Performance	Stellenbosch	Comparative Performance
Culture + History	41	Average	1 986	Average
Outdoor Activities	54	Average	21 891	High
Destination Services	51	Average	12390	Average
Food + Culinary	59	Average	38484	High
Relaxation + Wellness	61	High	157	Average
Amenities + Entertainment	39	Average	11 135	Average

There is an opportunity for the Winelands District to improve the visitor experience around outdoor activities, food and culinary to assist in improving sentiment, and opportunities must be found to increase volume in conversation around wellness and relaxation as this category has a high sentiment.

4.13.3 Tourism attractions audit

To get a better understanding of the current product offering in the Cape Winelands District Municipality and identify possible gaps, an audit of 8 visitor attractions took place.

Table 11: Cape Winelands District Municipality attractions audit

Attraction	Type of attraction	Annual visitors*	Adult admission fee	Child admission fee	% Adult	% Child
Taal Monument	Observation	50 001 - 100 000	R40,00	R5,00	75%	25%
Le Bonheur Reptiles and Adventures	Animal	0 – 25 000	R68,00	R42,00	75%	25%
Wonderdal	FEC	not available	not applicable	R95 – R160	not applicable	100%
Lamietberg Nature Reserve (Bainskloof)	Nature	0 – 25 000	R50,00	R30,00	87%	13%
Tulbagh Museum/ Church Street	Museum	0 - 25 000	R15,00	R5,00	80%	20%
Oude Drostdy Museum	Museum	0 – 25 000	R40,00	R15,00	70%	30%
Bosjes Chapel	Mixed	0 – 25 000	currently free	currently free	60%	40%
Jonkershoek Nature Reserve	Nature	0 – 25 000	R50,00	R30,00	91%	9%
Drakenstein Correctional Services	Historical	0 – 25 000	Free	Free	not applicable	not applicable
Wine Farm (Medium)*	Wine Farm	100 001 – 250 000	Majority are free entry but charge tasting fee	not applicable	Majority adult	not applicable
Wine Farm (Large)*	Wine Farm	250 001 – 500 000	Majority are free entry but charge tasting fee	not applicable	Majority adult	not applicable

** = No data, anecdotal evidence*

Attraction	% domestic	% international	Opening times	Closed days	Dwell time (hrs)	Full Time Employees	Contract Employees
Taal Monument	77%	23%	08:00 – 19:45	0	1 hour	14	0
Le Bonheur Reptiles and Adventures	40%	60%	09:00 – 17:00	0	1 hour	9	5
Wonderdal	n/a	n/a	09:00 – 17:00	1	2.5 hours	18	0
Lamietberg Nature Reserve (Bainskloof)	99	1	08:00 – 18:00	1	6 hours	n/a	n/a
Tulbagh Museum/ Church Street	50%	50%	09:00 – 17:00	0	2 hours	6	4
Oude Drostdy Museum	50%	50%	09:00 – 17:00	0	45 min	3	0
Bosjes Chapel	80%	20%	08:00 – 17:00	2	4 hours	22	0
Jonkershoek Nature Reserve	99%	1%	07:30 – 16:00	0	3	n/a	n/a
Drakenstein Correctional Services	not applicable	not applicable	daylight	not applicable	20 min	not applicable	not applicable
Wine Farm (Medium)**	Majority domestic		09:00 – 17:00	0	1 hour	not applicable	not applicable
Wine Farm (Large)**	Majority domestic		09:00 – 17:00	0	2 hour	not applicable	not applicable

** = Attraction data from 2018/2019, does not include membership visits*

*** = No data, anecdotal evidence*

n/a = not available or not applicable

4.13.4 Audit outcome

1. There are many small attractions in this district with admission numbers of under 25 000 per annum.

2. The district is well-known for its wine farms. Unfortunately, visitor numbers are not tracked or, when tracked, not shared. Anecdotal evidence in conversation reveals that a wine farm close to Cape Town can receive in the region of 200 000 visitors per annum, with larger established wine farm attractions receiving closer to 400 000 visitors.

3. Admission fees are cost-effective, with the majority being free or under R50 per adult.

4. The majority of visitors are adults even though the region offers much for families with children. This split may be a function of record-keeping as many sites are free entry, particularly those on wine farms.

5. The majority of visits are by the domestic market (this includes visitors to wine farms).

6. Most sites are open seven days a week and open during business hours.

7. Dwell time varies from 45 minutes to up to half a day.

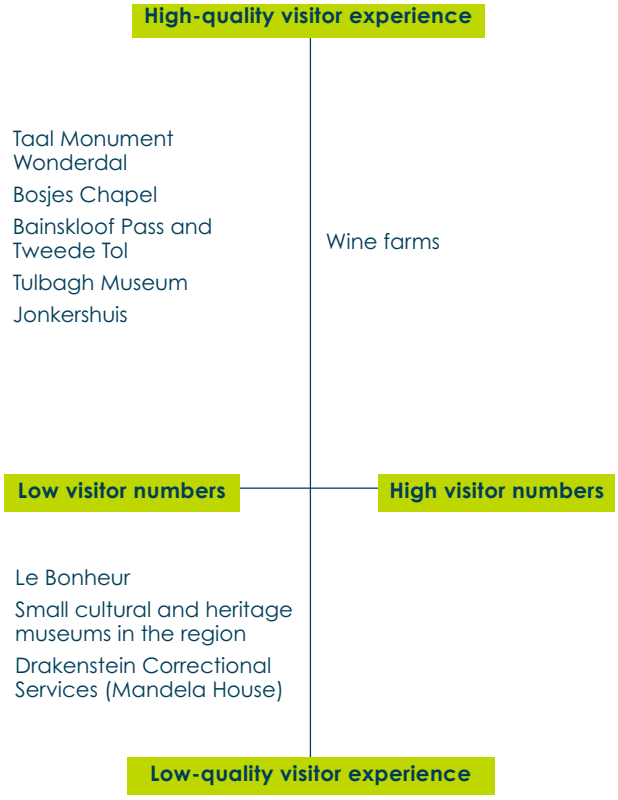
8. Attractions in the district tend to offer full-time employment and are good employment creators for the community. Attractions are people-intensive businesses with Bosjes and Wonderdal being good examples, employing 22 and 18 people respectively.

4.13.5 Audit segmentation

Based on the audit outcome, the visitor attractions were segmented into one of four quadrants.

The Cape Winelands visitor attraction segmentation is shown in Figure 46.

Figure 46: Audit segmentation for the Cape Winelands District Municipality



High quality, low visitor numbers

1. The wonderfully situated **Taal Monument** has magnificent views across Cape Town towards Table Mountain, well-kept gardens and iconic architecture. Interpretation is available via readable brochures about the architecture and birth of the Afrikaans language. The site includes a small children's play area.

2. Recently opened on the Hazendal Wine Farm, **Wonderdal** is a purpose-built edutainment centre for children aged 5 – 13 years. Combining advanced interactive technology with a creative 1000m^2 indoor space; this world-class experience covers topics related to the school curriculum such as energy, nutrition and life skills.

3. The Instagram-worthy **Bosjes Chapel** is an architectural meditative work of art. The site has gardens, a small children's play area and a good restaurant. Plans are to open a deli and increase the garden experience in 2020.

4. Built in 1854 and now a national monument, the **Bainskloof Pass** is a vertigo-inducing feat of engineering with many opportunities to stop and enjoy the view. The 18km pass provides inspiring views with the added benefit of a 'wild swim'

in the natural pools of **Tweede Tol**. Tweede Tol is an authentic mountain freshwater swimming experience but it needs to ensure that the site is clean of litter.

5. Boasting the street with the highest number of national monuments in one 800m stretch, **Tulbagh Museum Church Street** offers a high-quality experience of small-town architecture. The road is narrow and currently has two-way traffic. Converting this to one-way traffic would allow space for parking cars and widen the space for foot traffic, as the best way to view this street is by walking. The museum has four well-curated historical houses. Entrance fee is low and should increase to aid financial sustainability.

6. **Tulbagh Drostdy Museum** is a high-quality well-curated museum with ample parking. There is little information available to direct one there.

7. The beautiful **Jonkershoek Nature Reserve** has hiking and mountain bike trails easily accessible from Stellenbosch.

High quality, high visitor numbers

The wine farms in the region, mainly those closer to Cape Town can receive in the area of 200 000 to 400 000 visitors per annum. The majority of these wine farms offer a good quality of experience, but differentiation in terms of the visitor experience is low, for e.g. they all provide a similar wine tasting experience. Those wine farms that offer a differential experience, e.g. garden tour, historic manor house, picnics or children's play area, can draw increased visitor numbers above 200 000 (note anecdotal evidence only as admissions data not available).

Low quality, low visitor numbers

1. **Le Bonheur Reptile Adventure** offers an interesting experience but is a bit dated.

2. **Small cultural and heritage museums** in the district are charming, but many need to be curated to tell a single cohesive story.

3. **Drakenstein Correctional Services** (Mandela House) needs to take more ownership of the iconic moment that Mandela was released from prison. There is a statue, but there are no in-depth knowledge boards at the entrance providing more detail on this moment.

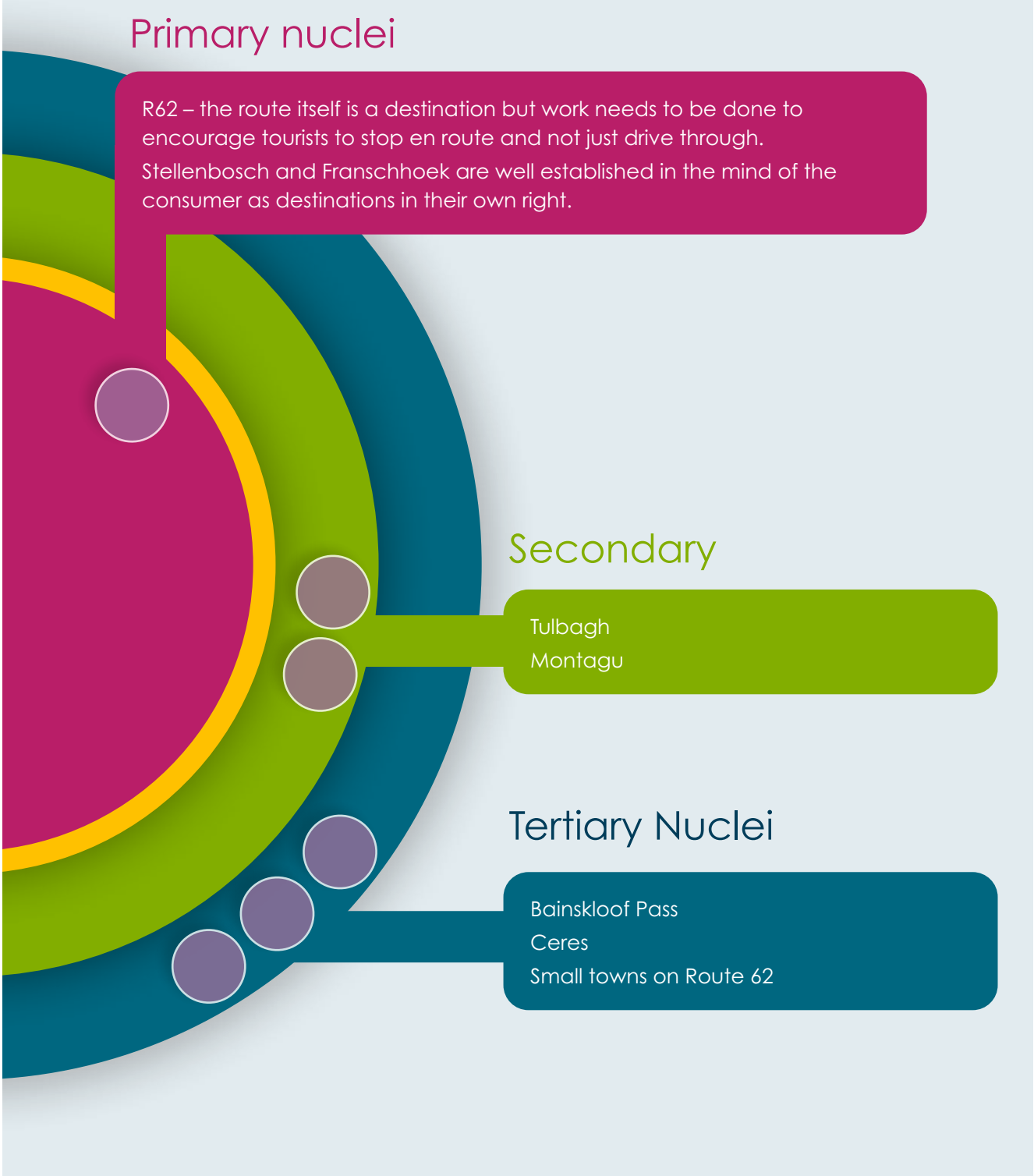
Low-quality, high visitor numbers

None.

4.13.6 Tourism nuclei

Based on the attractions audited, the tourism nuclei for the Cape Winelands District Municipality can be seen in Figure 47 below.

Figure 47: Cape Winelands District tourism nuclei.



4.13.7 Identifying the gaps

Through the analysis of online conversations and the audit of a sample of visitor attractions, gaps and opportunities present themselves for discussion. Below is a list of gaps identified through this process.

Gap 1: Lack of visitor attraction data for wine tourism

Desired outcome	Current state	Action steps
Maximisation of wine tourism.	The Cape Winelands District has a multitude of wine routes and wine farms, most of which are of world-class quality. Many provide children's play areas, wine tasting and gastronomical experiences. But few are willing or able to offer visitor data.	For the maximisation of wine tourism, wine farms will need to vie for visitors' time, attention and discretionary spend. Viewing their farm through the lens of a visitor attraction will aid wine farms in understanding the visitor's needs and where to invest. Footfall and dwell time are two critical drivers of spending on-site and both demand to be tracked and invested in for the tourism aspect of the wine farm industry to be maximised. A confidential survey as to visitor numbers to farms in the region would provide useful information to understand how these farms contribute to the attaction landscape.

Gap 2: Overlapping inter-provincial school holidays

Desired outcome	Current state	Action steps
Staggered school holidays.	The Western Cape does not have many family-orientated attractions, particularly for young families. However, the Cape Winelands District, particularly Stellenbosch and Paarl, have much to offer local families for a healthy day out. These attractions include places such as Butterfly World, Le Bonheur Reptile and Adventure Park, Monkeyworld, Wonderdal, Spier, Alpaca Farm and many wine farms that have children's play areas. These attractions rely on the domestic market.	Engage with the Department of Education (DOE) to stagger school holidays. Since 2016 the DOE has set school holidays such that all public schools share the same holidays countrywide. The change has shortened the holiday season by one week, resulting in a loss of income for attractions purpose-built for school-going children. A campaign for a staggered holiday calendar will provide several benefits. • Extend the domestic tourism season to support the industry • Reduction of travel cost as demand would be spread across a broader period • Alleviation of traffic as inter-provincial traffic would be spread over a broader time span • Staggering school holidays will lengthen peak seasons, increasing the sustainability of tourism and resulting in job creation • Seasonality for all in the tourism industry could thus be significantly increased by staggering coastal and inland holidays.

Gap 3: Iconic attractions vs iconic experiences along the R62

Desired outcome	Current state	Action steps
Differential iconic experiences in small towns along the R62.	The district offers a range of charming small towns that typify the rural lifestyle. However, differentiation and a reason to stop in each of these towns is not clear. In many cases the main road bypasses the centre of town, making it difficult for potential visitors to access.	Towns need to differentiate themselves by offering an iconic experience that is not available in neighbouring towns. Iconic experiences require less investment than iconic attractions but should provide a strong, simple visual, instagrammable cue that encourages travellers to participate in the experience.

Gap 4: Observational experiences and iconic viewing platforms

Desired outcome	Current state	Action steps
Iconic viewing platform at Kanonkop, Montagu. (This could be the start of a set of iconic viewing platforms that unites the R62 road trip experience and encourages travellers to stop and collect these photo-worthy experiences).	Montagu is a charming town with much to offer, howeve,r the main road through Cogmanskloof tunnel only has a small sign to the centre of the town and is easily missed. Cogsmankloof Tunnel is an iconic image of Montagu, yet is currently difficult to access and photograph.	1. Create an opportunity for travellers to stop and photograph this iconic entrance to the small town. 2. Montagu Museum and the Joubert House are just a short walk apart, yet the pavement provided is along a busy road. Langstraat is narrow and does not encourage walking, nor does it offer a safe place to do so. 3. The Kanonkop viewpoint, which is three blocks up from Bath Street at the centre of town, provides a great view over the town and a chance for tourists to stretch their legs after a long day of driving. There is an opportunity to provide a small, iconic observational experience with information about the town at this point. Tourists need a reason to stop; this will encourage longer stays and spend in the town.




Gap 5: Lack of diversity in gastronomy offering

Desired outcome	Current state	Action steps
Gastronomy experiences for the multi-generational and Halal market.	Currently, there is very little reason for multi-generational (who don't want to do wine tasting) and Halal touristss to visit the Cape Winelands.	Diversify the gastronomical farm experience to include experiences such as: • Olive tasting, e.g. Oakhurst Olives • Cheese tasting: Fairview has done this successfully • Dried Fruit: Montagu has a large farm stall called Capedry, but this can be expanded to be an experience or iconic farm stall • Provide an opportunity for a traditional South African braai. A South African traditional braai is often quoted as being our national gastronomical experience. Yet, there is no opportunity to have such a meal in the outdoors on an open fire.

Gap 6: Quality of visitor experiences in small historic towns and the pricing thereof

Desired outcome	Current state	Action steps
Curated small-town museums that provide a high-quality experience, allowing for an increase in entrance fees.	Many small historic museums run by the Department of Arts and Culture exist in these small towns. They have under 25 000 visitors per annum, and charge R15 entrance fee per adult, e.g. Tulbagh, Montagu.	The museums are often cluttered and do not tell a cohesive story. The R15 entrance fee is unable to cover running costs, nor does it provide a surplus for further investment into the experience. The charm of these small-town museums, often original settler homes, speaks for itself. The museums do need to ensure that a single cohesive story is told, and the entrance fee is reviewed to ensure financial sustainability.

Gap 7: Gateway to the broader Cape Winelands

Desired outcome	Current state	Action steps
To use Stellenbosch and Franschhoek as a base to explore the Cape Winelands District.	Stellenbosch and Franschhoek are promoted as a base to explore Cape Town.	Promote these towns as a base to explore the broader Cape Winelands district. There are many towns and experiences within a 90-minute drive, and this will alleviate the stress of working around Cape Town's commuter traffic. Stellenbosch is a beautiful town with many historic houses, but these have become obscured by parked cars and traffic. The town will need to invest in creating a pedestrian zone that encourages walkability and creates an opportunity for visitors to meander through upper Dorp Street and Church Street.

Gap 8: Gateway to Tulbagh, Ceres and Worcester

Desired outcome	Current state	Action steps
A classic mountain pass route that acts as the gateway to Tulbagh, Ceres and Worcester.	Bainskloof Pass is a classic mountain pass that links several tourist sites and provides the ideal circular route between Wellington, Tulbagh, Ceres and Worcester. The opportunity to stop at Tweede Tol for a swim on a hot summer's day adds to the charm. 'Wild swimming', a term popularised in the UK, refers to swimming in natural bodies of water such as pools, ponds, rivers and the sea. Bainskloof is the perfect wild swimming spot in the middle of fynbos-coloured water.	Dedicated marketing campaign.

Gap 9: Home of cycling

Desired outcome	Current state	Action steps
Position the Cape Winelands district as a Sports Tourism district e.g. cycling.	Road cycling and mountain biking are popular sports in the Western Cape. Many road and mountain trails already exist. But these are often dedicated to ultra cyclists. Cycling is a sport for the whole family.	If families are to dedicate a weekend away in the charming towns of the Cape Winelands district, then a range of cycling options needs to be offered that the whole family can enjoy. Much as ski resorts have a variety of ski runs dedicated to the various skill levels, the district can become a real cycling mecca if more options are available for the whole family.

Gap 10: Flagship stop at the entrance of Drakenstein Correctional Services

Desired outcome	Current state	Action steps
A flagship stop to the entrance of the prison.	Drakenstein Correctional Services can leverage the iconic image of Nelson Mandela's final steps to freedom.	The freedom statue at the entrance can become a flagship stop but needs some interpretation boards that explain this moment in history. Renaming the site would be helpful as Drakenstein Correctional Services is not a user-friendly term and has no link with the iconic moment in history. A good example is the 'Capture Site' in KZN that has created a regionally iconic attraction from a mostly featureless site. Tours within the facility are currently available for very small groups. These can be developed as part of phase two once the flagship stop has gained momentum.

4.13.8 Summary

There are many tourism opportunities available to the Cape Winelands District Municipality and the industry to attract visitors and their spend; this section has put forward 10 suggestions. For an opportunity to be realised, not only would a partnership model between the public and private sector need to exist but a clear understanding of what barriers are in place preventing the realisation of the opportunity (e.g. regulations) and solutions from removing these barriers would need to be developed.

The Cape Winelands has a wide variety of attractions to offer. Wine farms will need to find a way to differentiate themselves by providing extensive experiences that go beyond wine tasting. There is an opportunity to offer observational experiences, traditional South African braai experiences and family entertainment centres for families to enjoy the natural surroundings.

While Stellenbosch and Franschhoek are geographically close to Cape Town, the morning and evening rush hour traffic means that visitors cannot conveniently use this as a base for exploring Cape Town. The opportunity thus exists for Stellenbosch and Franschhoek to be used as a base to explore the unique and charming towns of the wine region in the north.

5 FOCUS AREA 2: Business events (also referred to as MICE)

5.1 Introduction

MICE or **business events** is a form of tourism where visitors travel for business purposes, either domestically or internationally to attend a corporate meeting, incentive trip, congress/conference or trade exhibition. The name MICE is an acronym for Meetings, Incentives, Conferences and Exhibitions. Globally there is a movement towards the use of the term, business events instead of MICE.

5.2 The economic importance of business events

The significant growth of the business tourism industry globally has sparked awareness of its macro and micro economic significance as a destination as shown in Figure 48 below.

Business events can also leave a long-lasting legacy in a destination. This positive impact can be through a gifting legacy or an industry legacy.

A **gifting legacy** has a lasting effect on a community, city or country through activities that prioritise the environment or help improve the lives of future generations.

An **industry legacy** has a positive, disruptive and transformative impact on the business events industry. These could be around innovative meeting design, the use of technology and approaches to marketing and sponsorship initiatives. Through the sharing of knowledge and professional practices, these events also help build better relationships between delegates, often from diverse and different cultures and countries.

Figure 48: The macro and micro impact of business events

Business events

Direct spending

Tax revenues

Employment

Tourism

Macro economic impact

FOCUS > attracts the world's industry and thought leaders

PLATFORM > showcases innovation, products and expertise

PROFILE > generates media attention as a place to do business

INVESTMENT > provides a world stage – 'if they see it, they will invest'

EXPERTS > stimulates international markets for locally produced goods and services

NETWORKS > builds business contacts, trade and research links

ACCESS > delivers access to new technologies and exchange of ideas

KNOWLEDGE > strengthens professional expertise

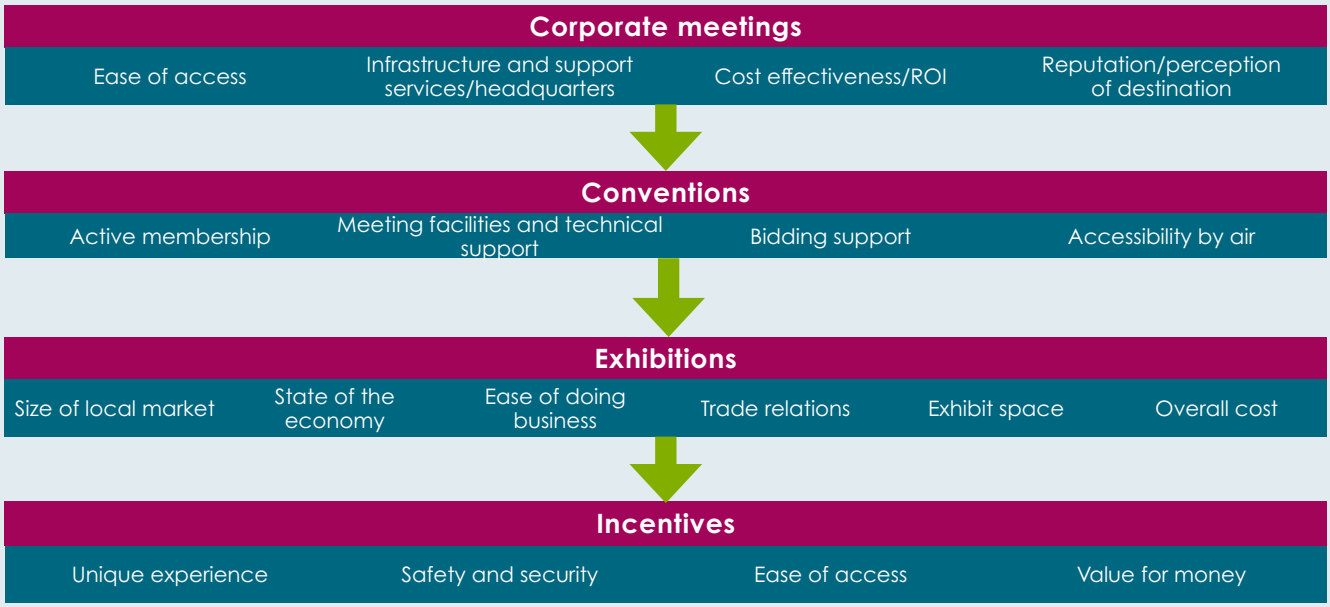
Micro economic impact

5.3 Key requirements for decision makers

The key decision makers or event planners judge the suitability, competitiveness and attractiveness of a potential host destination against the criteria as shown in Figure 49.

By understanding what is important to event planners when selecting a host destination, Tourism Blueprint 2030 aims to fill the gaps, remove the barriers, and take advantage of the opportunities and trends to help increase the number of business events in the Western Cape.

Figure 49: Key requirements for decision makers



Source: South African National Convention Bureau, 2020

5.4 Key trends impacting the industry

To a great extent, the volume of demand for business events tends to reflect the destination's level of economic activity. However, it is vital to take note of critical trends that are emerging as these will have a significant impact on the actual events themselves.

Increased focus on health and safety

Personal and cybersecurity management are fast becoming a destination necessity.

Similarly, the prospect of global pandemics like SARS and Covid-19 requires resilient national health systems to retain confidence.

Delegate wellbeing

Delegate wellbeing provision at the event need to take into consideration not only nutrition but also activities.

Event return on investment (ROI)

Measurable ROI has emerged as an important deciding factor for event planners. Meeting planners are becoming more receptive to Strategic Meetings Management (SMM) which looks at the containing and reducing of costs and the mitigating of regulatory and duty-of-care risk while delivering a unique and engaging event.

Emerging demand for secondary destinations

There is a growing demand by meeting planners to host business events in secondary cities or developing countries as associations look to expand their geographic spread and membership base.

Smaller, more specialised and shorter events

Although there is a movement towards an increase in the number of business events, these events are smaller in size and have highly specialised content. An example of this is the specialisation within the medical industry, which has seen a drop in the size of large conferences, but there has been an increase in smaller specialised conferences.

Change in venue choice

Mid-scale hotels will likely lead in venue selections as more emphasis is placed on cost controls. Along with non-traditional type event spaces such as museums, historic buildings, sports venues and other unique venue types, hotels will be used to attract delegates.

Cost control measures

A decrease in lead times and travel costs will form part of cost control measures.

Increased demand for authenticity

Authenticity, exclusivity and legacy will be crucial in tourism experiences offered to planners.

Technology to create engagement

Technology types such as virtual reality, augmented reality, artificial intelligence and the internet of things (IoT) will be used by event planners to improve delegate experience.

Covid-19 has also accelerated the emergence of so-called blended or hybrid events.

5.5 The role of the convention bureau

A convention bureau plays a significant role in the ability of a destination to secure international meetings, congresses or trade exhibitions. The convention bureau's primary purpose is to position, market and sell the destination it represents, and it is often the first point of contact for the meeting planner charged with organising the business event.

The convention bureau actively generates leads through sales calls, attendance of trade shows, networking and leveraging the ICCA (International Congress and Conference Association) and other relevant databases (e.g. BestCities) and business-to-business lead-generating marketing campaigns. The convention bureau team sits within the destination marketing organisation. In the Western Cape, the Cape Town and Western Cape Convention Bureau is a strategic unit within Wesgro's destination marketing team. This team works closely with the National Convention Bureau, which is a strategic unit within South African Tourism. Traditionally convention bureaus are situated at a city level. The benefit of having it at a provincial level in the Western Cape is the opportunity to drive the geographic spread of business events, especially for incentive trips and meeting planners looking for secondary cities.

From a destination perspective, while convention bureaus understand the legacy and economic impact of conventions, the benefits are not always clearly defined or understood by stakeholders and the meetings industry at large.

The Urban Innovation and Accelerators Report, 2018, highlighted the following key takeaways for Convention Bureaus to leverage:

1. The meetings industry is a global innovation distribution channel
2. Convention Bureaus are importers and exporters of knowledge and brokers of innovation
3. Convention organisers should leverage the destination's innovation economy for programme content
4. Make economic development more understandable and engage academia to define the full economic impact of business events
5. Embrace the concept 'Collaboration is the new innovation'
6. Understand the context of the destination's long-term strategic view
7. Define the future of the destination as a connected platform for value exchange

5.6 The value of the industry

Globally, business events play an essential role in the tourism economy. In 2017 (as shown in Figure 50) the business events industry generated over US$1.07 trillion of direct spend with more than 1.5 billion participants in over 180 countries.

Figure 50: 2017 Global Value of Business Events

1.5 bn participants

180+ countries

US$1.07 trillion in direct spend

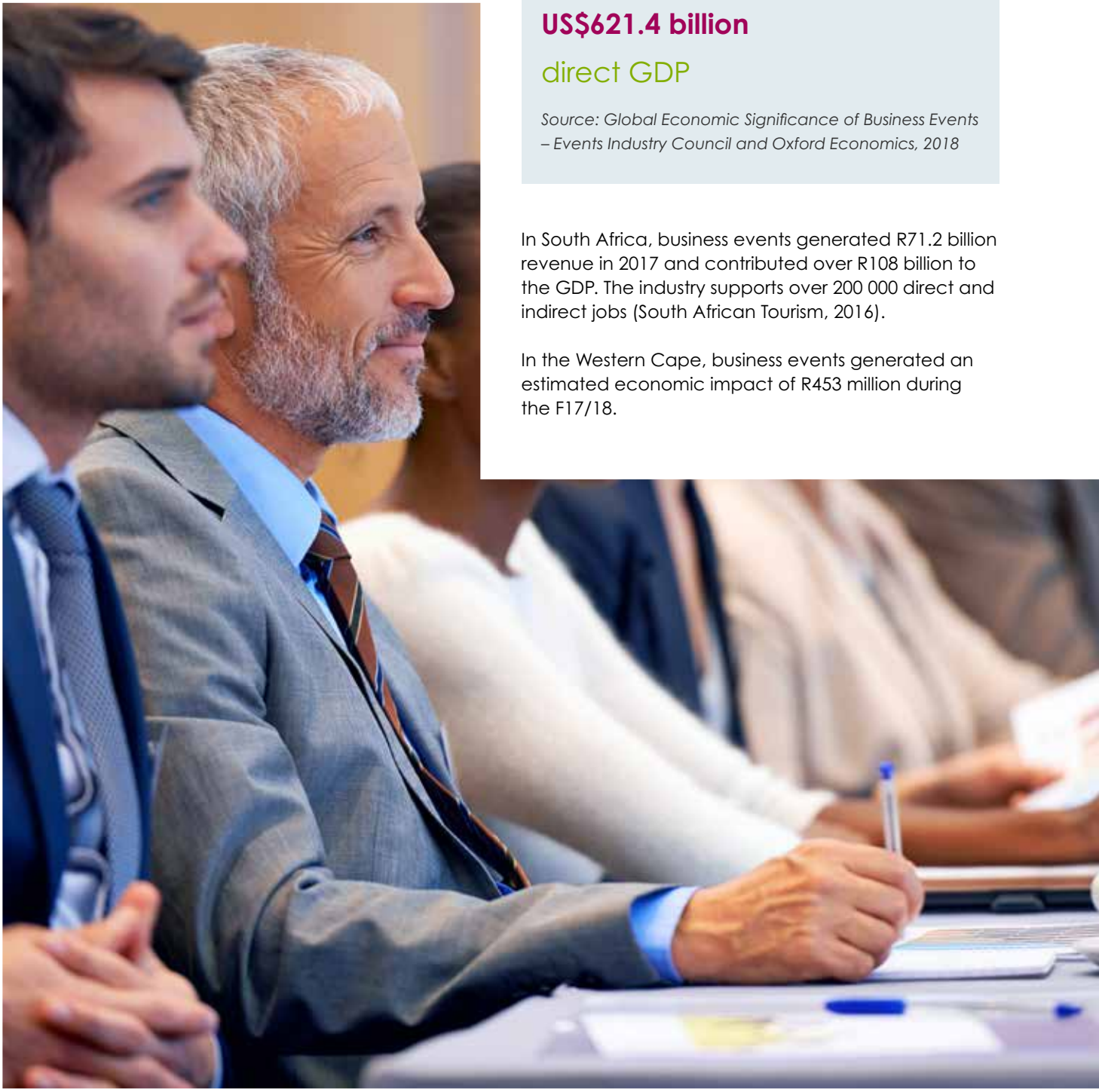
10.3 million direct jobs

US$621.4 billion direct GDP

Source: Global Economic Significance of Business Events – Events Industry Council and Oxford Economics, 2018

In South Africa, business events generated R71.2 billion revenue in 2017 and contributed over R108 billion to the GDP. The industry supports over 200 000 direct and indirect jobs (South African Tourism, 2016).

In the Western Cape, business events generated an estimated economic impact of R453 million during the F17/18.



5.7 Business events demand for the Western Cape

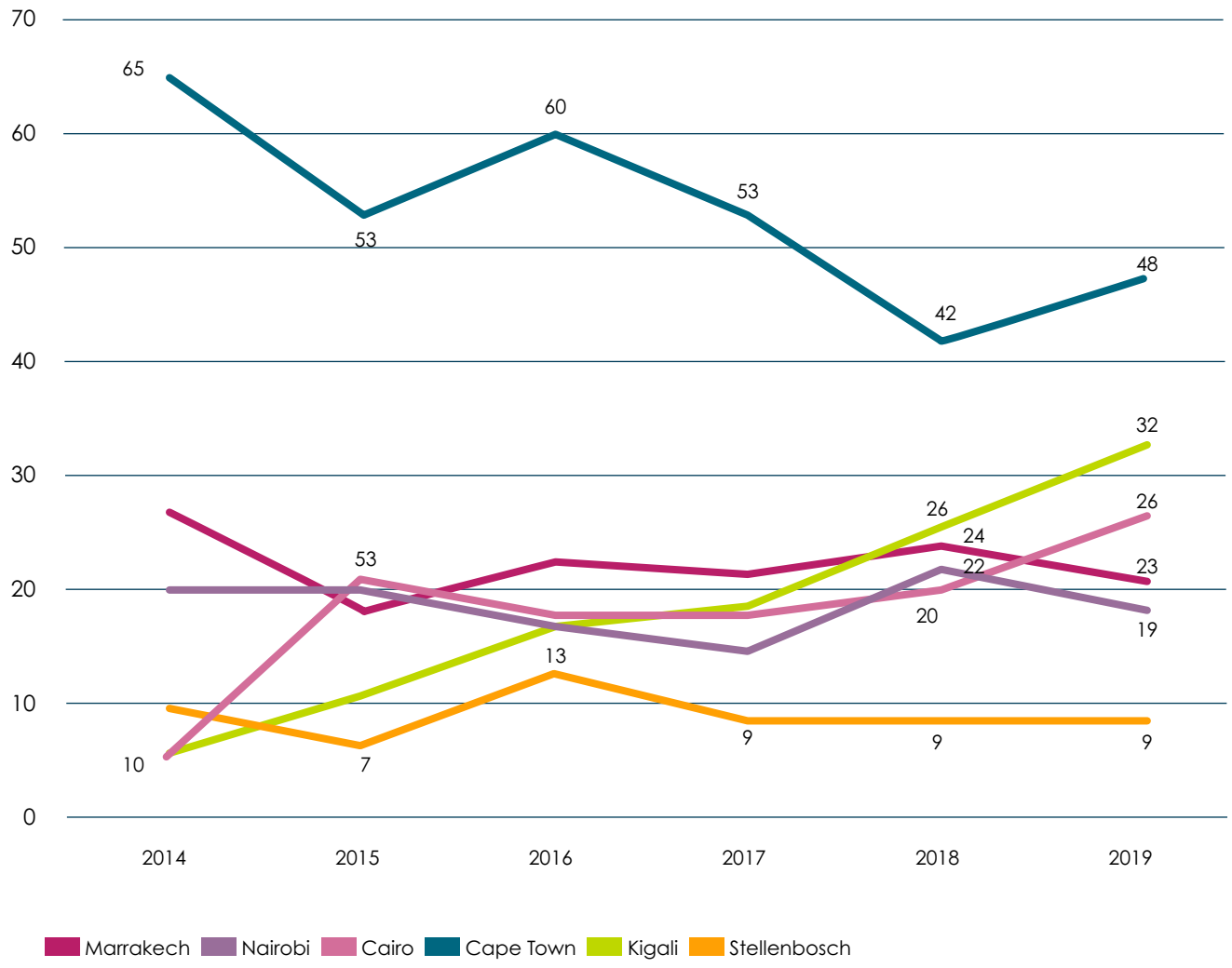
There is growing interest in the business community to meet in Africa, a trend that has sparked a surge in hospitality infrastructure development, making the continent one of the biggest emerging business events marketplaces. In the 2019 ICCA Ranking Report, it was stated that the number of international association conferences held in Africa has risen by more than 30%, and delegate attendance has increased by 20% over the past decade, with expectations of continued growth for the next decade.

However, the report states that Africa only accounted for 3% of all meetings (416) held globally (13 329). South Africa leads the way on the African continent, accounting for 24% of meetings recorded, with Morocco at number two (11% of meetings). Egypt, Rwanda, and Kenya are fast becoming prominent players.

Cape Town has managed to maintain the top position for the past decade, hosting the most meetings at a city level, as shown in Figure 51.

After a decline in 2018, Cape Town continues to face competition as meeting planners choose other growth destinations in Africa, such as Kigali, Nairobi and Marrakech, over Cape Town. Stellenbosch has remained relatively static over the past five years (2014 – 2018) according to the report.

Figure 51: Number of association meetings in Africa, by city



Source: ICCA, 2019

5.8 Supply and demand profile of business events

Supply and demand within the business events industry are intrinsically linked to developments in the global economy, as well as levels of prosperity and growth within individual economies and sector alignment.

Agriculture, telecommunication, mobile banking, and healthcare are the sectors expected to show the most robust growth in the coming years globally.

The outcome of this growth will be the need for more associations representing these sectors, resulting in more business events.

Within the Western Cape, the strategic sectors which show excellent growth potential are (1) agriculture, (2) manufacturing, (3) creative industries, (4) oceans economy, (5) marine services, and (6) finance and business services, or Business Process Outsourcing (BPO).

5.9 Sources of demand

The **demand side** of the business events market includes organisations that are responsible for generating meetings, incentives, conferences, conventions, events and exhibitions, referred to as the initiator, client, buyer or planner.

5.9.1 Corporate meeting event planners

Key criteria for host destination selection:

1. Ease of access (airlift and ground transportation)
2. Infrastructure and support services/headquarters
3. Cost-effectiveness and ROI
4. Reputation or perception of the host destination (safety and security, economic and political stability)

Key trends impacting corporate meetings:

1. Cost control measures
2. Smaller, specialised and shorter events

Opportunities:

1. Globally the key market sectors are corporates (i.e. banking and finance, engineering, construction, pharmaceuticals, information and communications technology, and the automotive industry). They make up a critical part of the global event procurement marketplace, not only as buyers of meetings and events but also as sponsors of events and sources of delegates attending major knowledge-based meetings.

> Survey results from the Global Meetings and Events Forecast (American Express 2019) suggest that corporate meetings activity will produce consistent positive increases in both spend and attendee numbers in an environment where corporate meetings are thriving and incentives trips have not just come back but continue to grow.

5.9.2 Incentive trip event planners

Key criteria for host destination selection:

1. Unique experience and destination appeal
2. Safety and security
3. Ease of access (direct air access)
4. Value for money (high quality accommodation and service levels)

Key trends impacting incentive trips:

1. Increased demand for authenticity (unique rich cultural experiences)
2. Smaller groups with more personalisation

Opportunities:

1. For the US market, the most popular long haul destinations are Asia, Australia, South America, and Africa.
2. A shift in expectations year-on-year from incentive travellers means they still want the 'money can't buy' inspiring destinations that offer exclusivity, privacy, and memorability; however, health and wellness is now featuring high on the agenda.

> The UK's 'C&IT Incentive Travel Report 2018' reflects that companies today are more open to international, remote and creative destinations; they are looking for a destination and a complete package that is memorable, motivational and meaningful. It must have world-class hotels, great activities, and bucket-list types of experiences, and at a value-for-money price point.

5.9.3 Conference and congress event planners

Key criteria for host destination selection:

1. Active membership
2. Meeting facilities and technical support
3. Bidding support
4. Accessibility by air

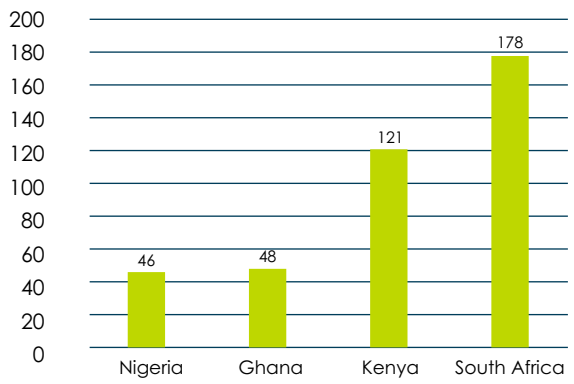
Key trends impacting conferences and congresses:

1. Increased focus on health and safety
2. Delegate wellbeing
3. Event return on investment
4. Emerging demand for secondary destinations
5. Smaller, more specialised and shorter events

Opportunities

1. Conferences and congresses are the most lucrative per-capita sector within tourism due to their high-spending delegates.
2. Headquarters Magazine (Europe) found that an estimated 775 non-governmental organisations (associations) have their headquarters in 34 African countries, as shown in Figure 52, with South Africa, Kenya and Ghana being home to the most – this opens up many opportunities to host African association meetings in the Western Cape.

Figure 52: Number of association headquarters in Africa (top countries)



Source: Headquarters Magazine (Europe), 2018

5.9.4 Trade exhibition event planners

Key criteria impacting host destination selection:

1. Size of local market
2. State of the economy
3. Ease of doing business
4. Trade relations
5. Exhibit space
6. Overall cost

Key trends impacting trade exhibitions:

1. Delegate wellbeing
2. Event return on investment
3. Change in venue choice
4. Cost control measures
5. Technology to create engagement

Opportunities

1. Globally there are an estimated 32 000 exhibitions hosted each year, featuring 4.5 million exhibiting companies and attracting over 303 million visitors. Exhibitors' and visitors' combined spend is around US$137 billion every year on shows, making them a significant global industry.
2. Despite the recent slowdown in the global economy, there are signs of positive growth for the exhibition industry, with 80% of respondents across 53 countries from the exhibition industry declaring an increase in turnover (22nd UFI Global Exhibition Barometer, 2019). This positive outlook is exceptionally stable in both the Asia/Pacific and Middle East/Africa regions, which have recorded the highest levels in the past five years (22nd UFI Global Exhibition Barometer, 2019).
3. As a key future market, Africa's middle class is expanding most rapidly, which is drawing interest from manufacturers of consumer goods. A keen buyer and seller market is a key demand driver for exhibitions. In Africa, 42 000 recorded exhibitors were spending US$12 594 each, resulting in a gross economic impact of US$0.5 billion in 2018 (UFI-Oxford Economics – Global Economic Impact of Exhibitions, 2019).
4. South Africa is the industry leader accounting for 16% of the Africa/Middle East regional venue space available with a robust inventory of exhibition centres, good air access, and supporting infrastructure. Many shows take place in North Africa in Tunisia, Morocco, Egypt and Algeria. The most popular business sector for trade shows in Africa is the building and construction sector; with trade shows for interior decoration, apparel and clothing, as well as consumer goods fairs, also typical.

5.10 Demand enablers

Demand enablers are factors that can assist in the growth of demand. Examples of enablers, a description thereof and suggested activities are shown in Table 12 below.

Younger generations are playing a more significant role in the meetings industry – as both delegates and planners – and are significantly contributing to the evolution and expansion of the business events sector. Meanwhile, event planners are continually required to do more with less. Budgets have generally remained flat while simultaneously the demand for unique experiences, advanced technology and enhanced food and beverage offerings is at an all-time high. As a result, those who arrange meetings and conferences are more critically assessing venues and elements that provide high impact experiences, with strong returns on investment (IACC Meeting Room of the Future Report 2019).

Table 12: Demand enablers for the Western Cape business events industry

Enabler	Description	Suggested activity
Industry associations	Associations that represent the industry (e.g. SAACI, SITE, EXSA).	Cape Town and Western Cape to host quarterly meetings with industry bodies to keep them abreast of activities.
Accommodation sector	Range of accommodation options available to a delegate.	Provide a wide range of offerings at various price points to meet the budget constraints of delegates.
Accessibility (air access and visa regulations)	The ease of access (direct flights and visa exemption) supports demand stimulators.	Continued focus on improving air access and removal of visa constraints.
Venues	Meeting spaces which include convention centres, hotels and unorthodox spaces (e.g. City Halls) in primary and secondary cities in destinations.	Demand is rising for unusual spaces and hotels to host business events and for secondary cities. Destination development should take this into consideration and combine technology, design and visitor experience into the planning process.
Technology	The use of technology as a supplement to offset budgetary limitations on attendance and optimise opportunities arising from hybrid event models in light of Covid-19.	Develop an integrated system through the use of mobile apps, facial recognition, virtual reality, artificial intelligence, online sourcing and social media to enhance the delegate experience and reduce costs.
Health, wellbeing, safety and security	Health, wellbeing, safety and security are a major concern for delegates and event planners.	High responsiveness of destination to show health, wellbeing, safety and security measurements in place.
Meetings cost	The perceived cost of a business event for a delegate includes flights, accommodation conference ticket price and pre- or post-tours.	Do a study to measure the meeting cost of Western Cape against main competitors to check value for money offering.
Legal trends	Data privacy, emergency planning and code of conduct are global legal developments that are creating new 'best practices'.	Adoption of meetings management policies to address data protection. Development of a comprehensive emerging plan for business events when in destination. Development of a code of conduct to address improper behaviour that could take place during a business event (e.g. sexual harassment).

5.11 Demand stimulators

Demand stimulators are activities undertaken to increase demand. Examples of stimulators, descriptions thereof and suggested activities are shown in Table 13 below.

Table 13: Demand stimulators for the Western Cape business events industry

Stimulator	Description	Suggested activity
Industry trade shows	Trade show for the business events industry, from both the demand and supply sides, to meet (e.g. IMEX America, IMEX Frankfurt and SITE events).	Use platform to promote destination, build new relationships and leverage existing relationships.
Convention Bureau	Promotion agency for the destination and seen as a trusted source of information.	Development of a unique business events and destination brand for the Western Cape.
Social media	Digital media heavily reliant on engagement.	Leverage LinkedIn to market the destination and up-and-coming business events.
Familiarisation trips (Fam trips)	Hosted buyer trips used to showcase the destination and product and support services offering.	Develop a plan to reach and take key decision makers on fam trips to showcase the destination, product and support service offerings.
Industry media	Niche publications (printed and digital) aimed at the business events industry (e.g. MeetingsNet.com and Successful Meetings).	Develop a marketing campaign to run in selected industry publications.
Return on Investment (ROI)	Meeting planners are increasingly focusing on ROI to deliver more for less.	Provide innovation to help reduce costs but improve visitor experience and respond to the particular needs of a hybrid model.
Economic Impact	Economic benefits of business events (e.g. trade stimulation).	Educate stakeholders on the far-reaching economic benefits of business events.
Business events brand and marketing	The Western Cape (led by Cape Town) has performed well in the past decade in its position as the preferred business events destination in Africa. However, with strong competition from new markets, a new approach is needed to maintain its leadership position.	Shift marketing approach from product-centric to consumer-centric messaging and positioning.
Industry positioning	Position the Western Cape's business events industry as a leader in Africa.	Cape Town and Western Cape Convention Bureau to take the lead in facilitating an innovative positioning for the Western Cape business events industry e.g. membership of GDS-Index.

5.12 Sources of supply

The supply side of the business events consists of organisations that offer the physical space and services for hosting meetings, incentives, conferences, events and exhibitions. The core products that destinations require to service business events consist of a range of meeting venues and excellent accommodation facilities to international standards, good accessibility and infrastructure, perfect customer service, as well as a high level of safety and security.

5.12.1 Global supply trends

From a business events development perspective, in addition to their potential economic benefits, many destinations have constructed purpose-built convention centres as a tool for revitalising a city's lifecycle, and to use these purpose-built venues as the centrepiece for creating a vibrant urban centre. Investment in construction or refurbishment of facilities has, in many instances, supported improvements in the urban environment, acting as a catalyst for growth within the retail, hotel, and leisure sectors. A great example of this is the Cape Town International Convention Centre (CTICC) constructed almost 20 years ago in the downtown derelict docklands area of Cape Town, that is today a vibrant business hub.

The preferred choice of venue in Africa, as measured by the ICCA Ranking Report 2018, reflects that the demand for hotel facilities is growing, as shown in Figure 53.

Only 21% of venue demand was for convention centres, reflecting a declining trend from 32% five years before. While the statistics in Figure 53 may demonstrate a declining need for a city to invest in a convention centre from a capacity perspective, there may be other driving factors that support the development of meeting venues in secondary cities.

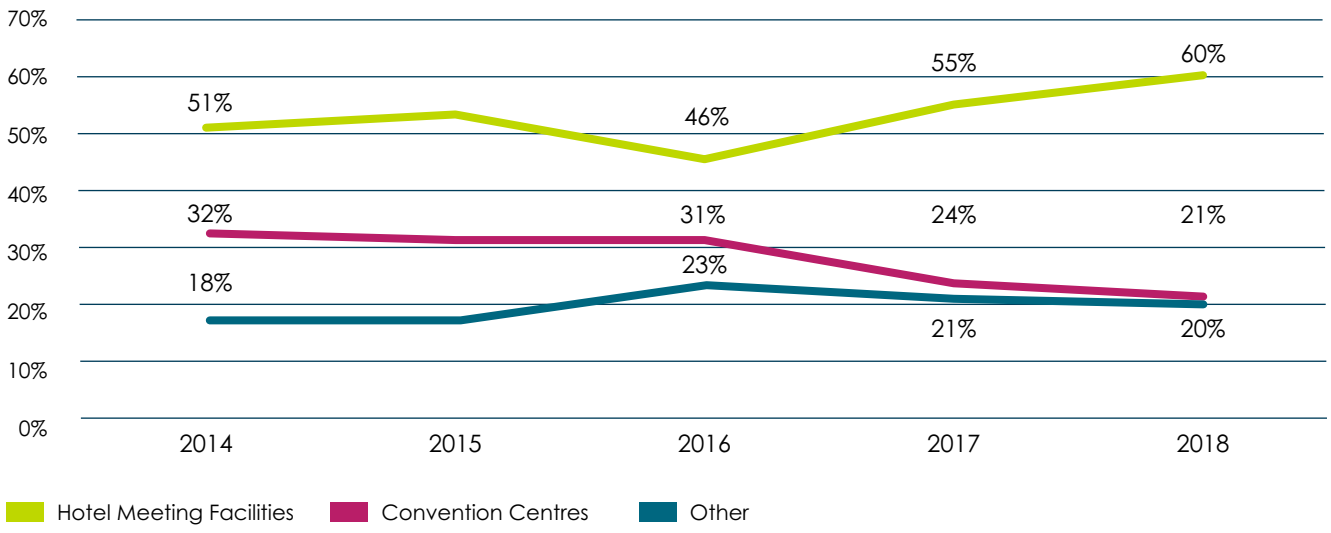
According to the International Association of Convention Centres, these driving factors are:

1. Convention centres may not always be profitable as they attract incremental business into the city that will generate economic benefits beyond the centre itself.

2. Aside from generating visitor revenues, convention centres support the business and academic communities, attracting global expertise, promoting knowledge transfer, and creating educational opportunities for the host community.

3. There is a rapidly increasing promotion of 'unusual venues' and facilities as event venue options based in establishments such as city halls, cultural venues (museums), sports venues (football stadia), and tourist attractions such as historical monuments, zoos, national and theme parks.

Figure 53: Prepared meetings venues

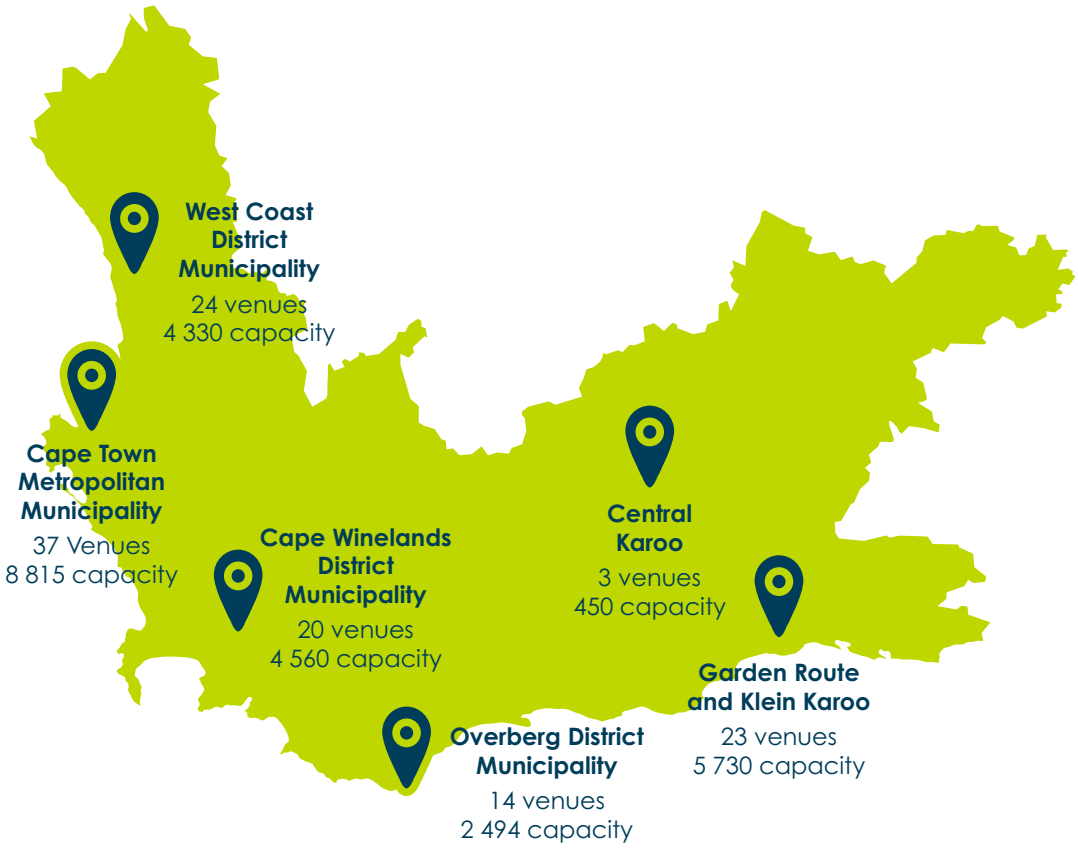


Source, ICCA, 2018

5.12.2 Supply profile of the Western Cape

Currently, the Western Cape has 121 venues servicing the business events industry with a capacity of 100 people and over, with 30% of these venues situated in the Cape Town Metro District. As meeting planners search for more unusual sites and venues in secondary cities, an opportunity opens up for the Western Cape. For Tourism Blueprint 2030, we have focused on two secondary cities and one town that offer the most potential at this time due to existing infrastructure and market readiness. Figure 54 shows the geographic spread of venues across the Western Cape.

Figure 54: Geographic spread of venues in the Western Cape



5.12.2.1 Stellenbosch supply profile

Distance from Cape Town International Airport:
38km 30 – 40 minutes' drive time
to the centre of **Stellenbosch**

Ground transport:
Car rental hire, chauffeur-driven services, metered taxis

Tertiary institutions:
Stellenbosch University, Boland College

Positioning:
Living conferences, events and incentives destination

Sectors:
Wine, agri-science, pharmaceutical and medical sciences, technology and ICT

Corporate headquarters:
Parmalat, Capitec, Remgro, Mediclinic

The Cape Town and Western Cape Convention Bureau supports INNOVUS, which is the university and industry interaction and innovation company of the University of Stellenbosch, in meetings lead generation and bidding activities. INNOVUS is becoming the vehicle to align sectoral growth for Stellenbosch with the rest of the Western Cape.

Stellenbosch is also home to Technopark, the Western Cape's Silicon Valley and Innovation District.

With its proximity to Cape Town International Airport, world-famous and respected university and headquarters of international companies (e.g. Distell, Capitec) and several meeting spaces, Stellenbosch is well-positioned as a secondary city.

Market readiness:

There is enough market-ready product to meet the needs of **79% of (ICCA Africa) association meetings** that are under **500 delegates** in size.

Stellenbosch – venues	Delegate capacity
70 conference and event venues	Max. capacity 600
Spier	Auditorium: 430 Main hall: 350
Lanzerac	5 venues max. 150 capaciy

5.12.2.2 George supply profile

Distance from George International Airport:
10km 10 – 15 minutes' drive time
to the centre of **George**

Ground transport:
car rental hire, chauffeur-driven services, metered taxis

Tertiary institutions:
Nelson Mandela University George Campus and several private colleges

Positioning:
No current business events positioning

Sectors:
Agriculture (berries, hops, avocados, kiwi, macadamia, and cheese); oil and gas

Corporate headquarters:
George Chamber of Commerce

George/surrounds – venues	Delegate capacity
Fancourt 5-star	Max. capacity 250
Oubaai – Herolds Bay 4-star (needs refurbishment)	Max. capacity 250
Protea King George 4-star	Max. capacity 300

Annual passenger traffic is only 836 000 with limited regular flights, resulting in high ticket prices. To make the town of George an attractive offer to event planners, ease of access would need to be improved by route stimulation, increased frequency, and competitive pricing.

Market readiness:

There is sufficient market-ready product for sales and marketing activities to commence in the **conference sector** that can host up to **250 delegates.** In the future, a larger venue (such as the refurbishment of the **George City Hall** that could cater to **500 delegates**) would be an advantage.

5.12.2.3 Knysna supply profile

Distance from George International Airport:
70km 50 – 60 minutes' drive time
to the centre of **Knysna**

Ground transport:
car rental hire, chauffeur-driven services, metered taxis

Tertiary institutions:
None

Positioning:
None for business events

Sectors:
Boatbuilding, industrial drones, timber

Corporate headquarters:
Knysna Yacht Company, ALTI

There are plans to re-develop the Knysna-Sedgefield rail link with a private sector investor on board. The railway station at the Knysna Waterfront could become a conference venue precinct facility.

While there are currently some market-ready venues in Knysna for meetings (Simola and Pezula), delegate capacity is limited to a maximum size of 200. The potential to focus more aggressively on the incentive and events sub-sectors of business events is there.

This distance between George Airport and Knysna would act as an inhibitor for attracting meetings, especially in the absence of reliable airlift, unless the subject of the conference aligns to the industry sector of the town.

Market readiness:

The Garden Route and Knysna are market-ready for packaging **incentive travel itineraries**, notably the excellent **golf estates, high-end accommodation** and a wide variety of activities on offer.

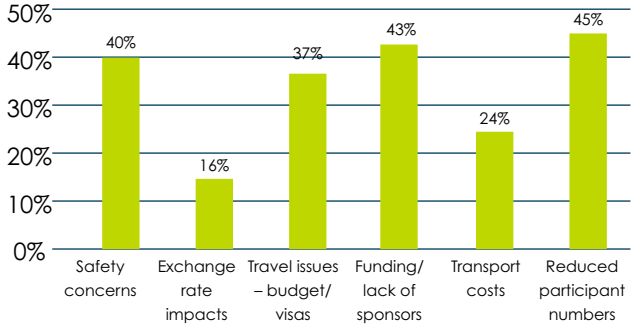
5.12.3 Supply profile recommendation

Of the two secondary cities and one town investigated, namely (1) Stellenbosch, (2) George and (3) Knysna, it is believed that Stellenbosch is currently best positioned to act as the Western Cape's leading secondary city in the short term. George offers excellent potential in the medium term. Knysna is well suited for the incentive travel market and must be packaged appropriately with the input of destination management companies (based in Cape Town) to deal with on-the-ground logistics for travel to and from Knysna.

5.13 Barriers to growth for business events

While the future brings opportunities for the business events industry, it undeniably also presents several risks. Union of International Associations (UIA) conducted research (2016 – 2017) about perceived risks for meeting planners as shown in Figure 55: Respondents answered the question, "What are your specific concerns about the impact of the global economic situation on your current and future meetings"?

Figure 55: Perceived meeting planners' risks



Source: UIA, 2016 – 2017

Safety and security remain the top issue for meeting planners, closely followed by the growing trend of fewer delegates attending conferences (Covid-19 has underscored these concerns).

5.13.1 Barriers to growth for the Western Cape, an industry review

A level of investigation was done with the local industry into the business events sector within the Western Cape, and the following findings and implications have been put forward, as shown in Table 14.

Table 14: Industry findings and implications

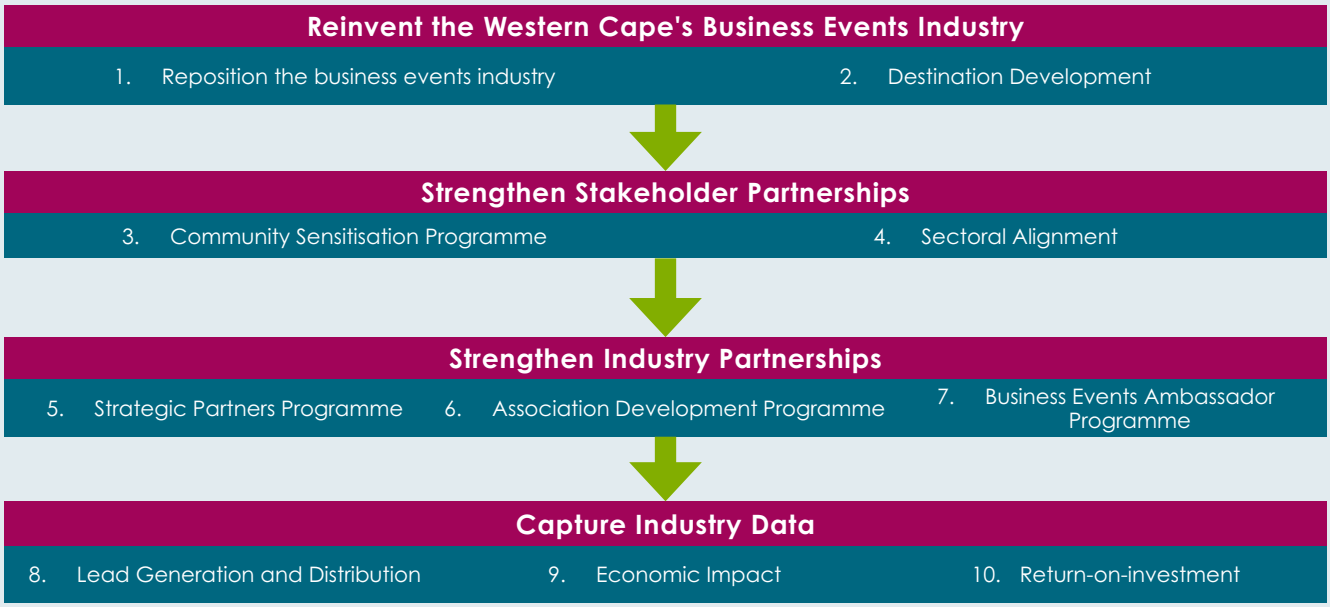
Finding	Implication	Barrier
Shrinking number of international association meetings for the Western Cape.	Western Cape/Cape Town has lost its competitiveness against other African cities such as Kigali and Nairobi.	Safety and security issues, issues with obtaining visas.
Lack of frequent broad stakeholder engagements across private and public sectors (incl. RTOs and LTOs) within the business events sector.	Limited understanding of the value of business events and how to attract business events.	Lack of resources and funding for the Cape Town and Western Cape Convention Bureau to deliver broad and frequent stakeholder management.
There is a gap in understanding between sectors and business events and how they can work together to grow their industries.	Leveraging of business events for the advancement of various sectors (e.g. leisure tourism, retail, inward investment into businesses) not happening.	Lack of understanding of the business events sector in some parts of the tourism value chain and other sectors.
There is not sufficient, real-time data available on the business events industry in the Western Cape.	Possible opportunities and return on investment not well understood and captured for the Western Cape.	Lack of resources and funding for the Cape Town and Western Cape Convention Bureau to provide data.

Finding	Implication	Barrier
Legacy has not been fully adopted.	While the industry understands the importance of legacy, it has not been adopted in a meaningful way.	Lack of understanding by industry, corporates and associations to fully embrace legacy.
The competitive set has increased, and the destination is lagging in awareness and marketing.	Awareness of Cape Town and the Western Cape as the first choice on the African continent is declining for business events.	Lack of resources and funding for the Cape Town and Western Cape Convention Bureau to focus on sales and marketing effectively. Costs of meeting venues and hotels, particularly in the high season, is another barrier. The destination is seen as a value-for-money destination but is also often referred to as having an expensive offer especially from its convention centre.

5.14 Identifying the gaps

Through the assessment of the business events industry both globally and locally the following gaps and opportunities present themselves for discussion as shown in Figure 56 below.

Figure 56: Gaps and opportunities for the Western Cape



Gap 1 A need to reposition the business events industry

Opportunity: Cape Town and the Western Cape Convention Bureau to take the lead in facilitating an innovative and fresh positioning for the Western Cape's business events industry.

Gap 2 Destination development of secondary cities

Opportunity: There is a growing demand by meeting planners for secondary cities in which to host their meetings. Identify short-term and medium-term cities that meet the criteria and develop them.

Gap 3 A gap in the understanding of the value of business events

Opportunity: Community Sensitisation Programme. Sensitising of key stakeholders (government and the private sector) through a business events educational campaign will establish a more robust industry.

Gap 4 Lack of sectoral alignment

Opportunity: The development of the sectors identified by the Western Cape Government should serve as the foundation for sourcing meetings.

Gap 5 Need for strategic partnership programmes

Opportunity: Build a public-sector coalition between the business events industry, economic development and promotional agencies, academic institutions and the private sector. This coalition will support the goal to curate a more immersive destination experience, manage sustainable business events sector growth and promote equitable economic development.

Gap 6 Lack of data into the association potential of the Western Cape

Opportunity: Association development programme. The objective of an association development programme would be to assess the Western Cape's association potential for drawing national and international meetings to the destination. It will also support the associations in strengthening engagement and profile with their foreign counterparts.

Gap 7 Leveraging of thought leaders to drive business events demand

Opportunity: Business Events Ambassador Programme. Business events ambassadors are a group of thought leaders sharing knowledge and influence, promoting innovation, and inviting their professional colleagues to meet in the Western Cape.

Gap 8 Lead generation and distribution

Opportunity: The proactive generation of leads is a critical success factor and opportunities such as sectoral alignment, association development and business events ambassador programmes will enable proactive lead generation. Tactics to generate leads include the management of industry lead databases, incentives for hosting business events and a lead distribution system.

Gap 9 Lack of data to measure the economic impact

Opportunity: There would appear to be limited data available to calculate the estimated income of business events to the Western Cape. The following formula is a possible approach to calculating the economic impact:

= Volume x Value x Length of Stay x Geographic Spread x Seasonality

= Economic impact and work creation

Find innovative ways to gather the data.

Gap 10 Lack of data to measure return on investment for Cape Town and the Western Cape Convention Bureau

Opportunity: All activities at the Convention Bureau should be geared to increasing the direct economic contribution to the tourism sector's GDP. The opportunity lies in developing a resource to focus on data collection and the continued use of a CRM programme explicitly developed for convention bureaus.

5.15 Summary

There are many opportunities available to the Western Cape business events industry to stimulate and support demand so that the destination can take advantage of the significant global industry. However, the constant need to reduce costs and navigate digital disruption while improving the visitor experience will put immense pressure on the destination and the business events industry. Competition to be the preferred business events destination on the continent is rapidly growing and focus on a new and innovative destination positioning is required.

Finally, Covid-19 reminds us of the vulnerability of international business travel to periodic global shocks while again demonstrating the events industry's ability to reinvent itself in times of crisis.

6 FOCUS AREA 3: Latent forms of tourism

6.1 Introduction

People travel for different purposes. It is these purposes that describe the various forms of tourism. Forms are as varied as atomic tourism, where visitors learn about the atomic age by visiting sites of significance, to wildlife tourism, where visitors travel to see wildlife in their natural habitats.

The Western Cape, blessed with a breadth and depth of diversity, caters to many different forms of tourism as shown in Figure 57.

For Tourism Blueprint 2030, further investigation was done into three specific forms of tourism. The three are (1) Cruise tourism, (2) Halal tourism, and (3) Sports and Events tourism. Stakeholders have identified these as having significant potential in terms of return on investment but they are currently not reaching their full potential.

Figure 57: Diversity of tourism in the Western Cape

Source: Wesgro, 2019

6.2 Cruise tourism

6.2.1 Introduction

Cruise tourism has been a booming segment in recent years. Pre-Covid-19 it was the fastest-growing sector in the tourism industry, with an annual growth of 7.4%, according to the Cruise Line International Association (CLIA, 2019), the world's largest cruise industry trade association representing 50+ cruise lines and more than 95% of global cruise capacity.

Even amid Covid-19, there is optimism with two out of three cruise lines willing to sail within a year (as at the end of 2020) and 58% of international tourists, who have never sailed, likely to cruise during the next year (CLIA, 2020).

Although the origin of cruise liners can be traced back to the 19th century when ocean liners transported people between countries and continents, its popularity skyrocketed due to the 1970s television series 'Love Boat'. Passenger volume doubled every decade from the launch of the show, giving viewers an insider's perspective of the exotic, exciting, exclusive and experience-rich potential of cruise travel.

It is worth noting a fundamental difference between cruise tourism and other forms of tourism. With cruise tourism, the ship is as much of a destination as the ports-of-calls along the way.

In 2018, **28.5 million passengers** took to the water for an average of seven days, generating an estimated **US$150 billion** in economic activity and creating **over 1 million jobs**.

(Cruise Lines Industry Association (CLIA), 2019)

6.2.2 The benefits of cruise tourism

One of the main benefits of cruises versus land-based holidays is the opportunity for passengers to see and do new things. Being able to visit multiple countries, cities and cultures on one holiday allows travellers to make the most of the immersive experiences.

The benefits of cruise tourism grow in line with how the cruise companies are innovating in:

1. Hardware (ship design and operations), and
2. Software (guest experience delivery)

That said, the significant benefits for a destination are economical and arise from five sources:

1. On-shore spending by cruise passengers and crew
2. Shoreside staffing of local offices of cruise liner companies for marketing and tour operations
3. Expenditures for goods and services necessary for cruise operations
4. Spending by the cruise lines for port services
5. Expenditures for maintenance

6.2.3 Cruising in Africa

The cruise season in Africa runs from October/ November to May. Primary ports of call include Cape Town, Durban, Mombasa, Mahé, Windhoek, Port Elizabeth, Maputo and Port Louis, as shown in Figure 58.

Figure 58: African cruise line ports of call

Other South African ports of call include Richards Bay, East London and Mossel Bay; however, from a cruise company perspective, they would be a secondary priority in terms of itinerary appeal and value for passengers.

December and January are particularly popular for cruises operating from South Africa.

As the majority of African cruises sail in the winter months for Europeans and North Americans, the warm temperatures and summer weather in Africa are a particular drawcard.

Itineraries on the African continent usually last about 10 days, although some cruise companies such as MSC Cruises do offer shorter trips. Most cruises start or end in South Africa, typically Cape Town or Durban.

Importantly, longer world voyages, with cruise itineraries over 20 nights long, often include Africa on their routes. Cape Town is usually a port-of-call, offering passengers a chance to do a day trip or to add an extended pre- or post-cruise tour.

According to Crew Center, there were 15 different cruise liner companies scheduled to dock at Cape Town Harbour between 30 December 2019 – 23 April 2021. This amounts to an expected 166 voyages in Cape Town during this season.

Of the ships scheduled, the most popular are:

1. The AIDAmira which is operated by AIDA Cruises, and is a subsidiary of Carnival Corporation. AIDA is Germany's largest cruise line, and as such most passengers speak German and are from German-speaking countries. AIDAmira operates 14-day cruises from Cape Town and has approximately 1 730 passengers.

2. MSC Cruises operate the MSC Orchestra. The primary market for MSC Cruises is Europeans, and they are increasingly marketing to North American travellers. MSC Cruises depart from Cape Town on both short 4-day itineraries to Namibia, as well as Grand Voyager Itineraries, which connect Cape Town to Europe. The MSC Orchestra carries approximately 3 013 passengers.

3. Azamara Club Cruises operates the Azamara Quest, which is a smaller, luxury vessel and takes about 724 passengers. They run 10-day cruises along the South African coast, starting and ending in Cape Town. It is worth noting that some of these voyages are themed, such as golf-focused. They also use Cape Town as a starting or ending point in some of their longer voyages to/from India and Dubai.

6.2.4 The cruise industry and responsible tourism

The cruise industry is under pressure from ports-of-call to work closely with the local communities to explore new and creative ways to manage the flow of visitors and implement the highest standards of tourism.

Figure 59 shows examples of ways the cruise industry is working with local communities.

Figure 59: Cruise companies and local community initiatives

Source: CLIA Industry Report 2020

One company embracing this is MSC Cruises. They unveiled a series of eco-tours under their new 'PROTECTOURS' programme in 2020. These carefully selected and designed shore excursions help to diversify experiences, thereby assisting in managing capacity while protecting and preserving the port-of-call's local community and natural beauty. While guests have for example the opportunity to hike through the Jamaican forests with rescue dogs or learn about honey production in Corfu as part of the 'PROTECTOURS' offering, they also get to make a positive and purposeful contribution to the local communities. Local tour operators who are part of the programme are required to become internationally certified under the Global Sustainable Tourism Council's certification programme.

6.2.5 Traveller trends and insights impacting cruise tourism

The following are traveller trends that are impacting cruise tourism

1. Solo cruisers:

As discussed in Section 3 | Forces and trends, the ability and desire to travel on your own have dramatically increased in the past decade. Cruising allows solo travellers a safe and hassle-free way to travel, allowing them to connect with other travellers while visiting far-away destinations.

Cruise companies are responding to this trend by offering studio cabins, single-friendly activities, and eliminating single supplements.

2. Female-centred cruising:

With the number of female travellers growing, many travel and tourism companies are creating female-centred itineraries based on interests and connecting women with other women.

3. Generation cruise positive:

More than 66% of Generation X and 71% of Millennials have a more positive attitude about cruising than two years ago (CLIA,2020). Gen Z is set to become the largest consumer generation in the next two years, outpacing the Millennials and Baby Boomers. Like the generation before, this age bracket prefers authentic experiences over material items and has even greater wanderlust.

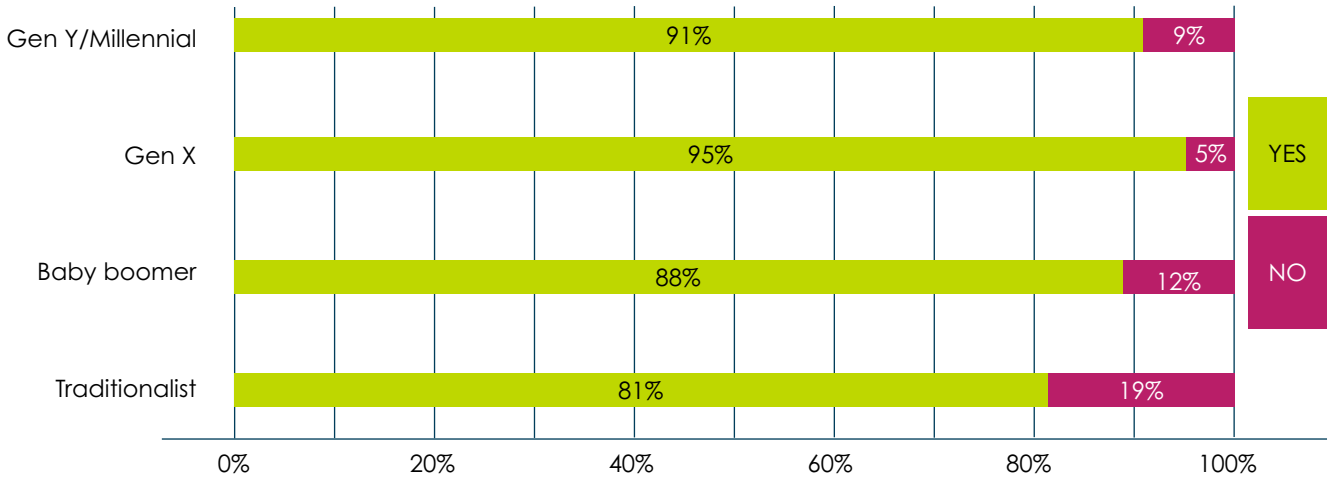
The appeal of multiple destinations and unique experiences as shown in Figure 60, such as music festivals at sea, is helping attract this new generation of cruises.

Cruise tourism is an exciting segment in terms of re-invention. For many years it became a signature travel offering for families and silver tourists (over 60 year olds); however, today, cruise companies are designing and delivering unique offerings for today's more personal and purpose-driven travellers of all ages.

Figures 61 and Figure 62 show the outcomes of research conducted by the Florida-Caribbean Cruise Association (FCCA) in 2019 that demonstrates the desirability of cruising to see destinations amongst different generations and the perceived strength of proposition compared to conventional land-based holidays.

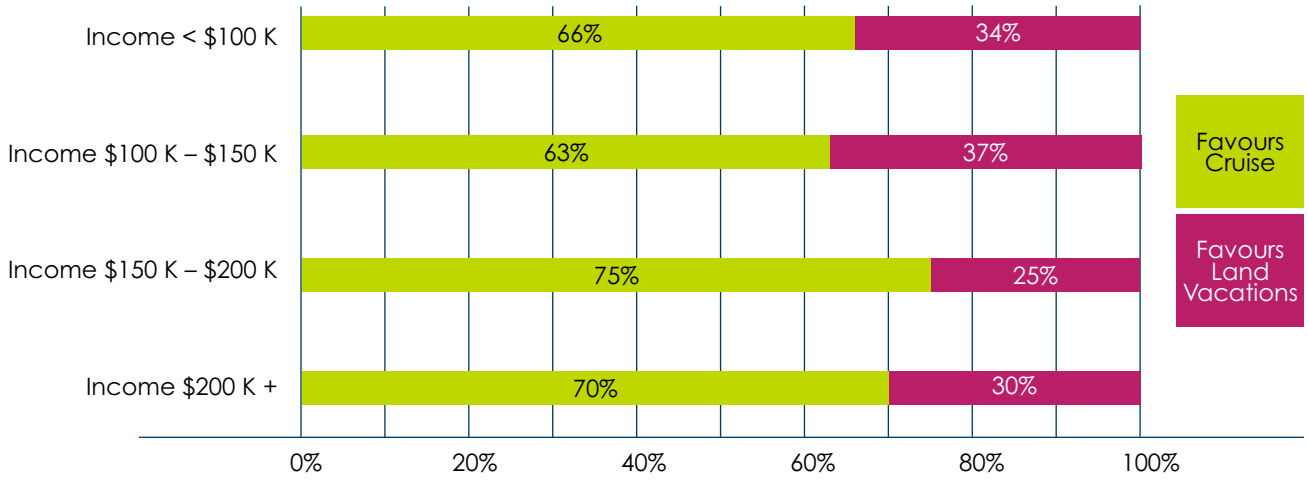
Figure 60: The party cruise with Jack Parow

Figure 61: Is cruising a good way to sample a destination?



Source: FCCA, 2019

Figure 62: Travellers' preference for cruising vs land holiday by income range



Source: FCCA, 2019

From a traveller perspective, cruise tourism's growth is grounded in the fact that:

1. It can reach destinations not previously accessible (e.g. Antarctic)
2. You only have to unpack once
3. It offers a range of price options, making it affordable to a large segment of travellers
4. It offers all-inclusive packages that eliminate additional costs (surprises)
5. It offers the opportunity for multi-generational travel
6. It has an openness to solo travellers
7. There is a high degree of passenger personalisation of onboard and in-port experiences
8. There are advances in connectivity making onboard working possible
9. There are strong loyalty programmes
10. There has been an improvement in the image of cruise tourism to becoming more stylish and smart, and a hipper way to travel

People who take cruises are very loyal to cruising, with 92% of cruisers saying they will probably book a cruise as the next holiday (FCCA, 2018).

68% of cruisers identified the destination of their holiday as the most critical factor influencing their holiday choice (FCCA, 2018).

Cruising is often the preferred holiday choice for families, especially those with children under 18, with children more involved in the decision-making process for cruises compared to land-based holidays.

Table 15 gives a technical overview of cruise segments and their offerings.

Table 15: Technical overview of cruise segments and offerings

Segment	Demographics	Itinerary characteristics	Itinerary duration	Ship characteristics	Representative cruise lines
Budget	Youth and lower-income population segments	Mediterranean itineraries and popular destinations: 'hop-on/hop-off'	3-7 days	• Small ships with minimum on-board facilities and services • Cruise passengers make their own beds	• Fred Olsen • Island Cruises • Louis Cruise • Pullmantur • Thomson • Travelscope
Contemporary	Target is very broad, offering 'something for everyone', but especially attractive to first-time cruise passengers, families, couples and young people	Popular destinations or zones	3-7 days	• Large, new ships • Resort-type facilities with a strong emphasis on on-board activities and services (such as beauty shops, golf, ice skating, spa, etc.) and family entertainment	• Carnival Cruises • Celebrity • Costa • Disney • MSC • Norwegian Cruise Line • P&O • Royal Caribbean
Premium	Over 40 age group, often professionals, targeting repeat passengers	Itineraries featuring rarely visited ports	Varied; more emphasis on cruises longer than 7 nights	• Smaller than contemporary segment • More refined furnishings • On-shore excursions are important profit generators • Two types of excursions are offered: for First-time (less sophisticated) and repeat customers	• Celebrity Cruises • Fred Olsen • Holland America Line • Oceania Cruises • Pullmantur • Saga

Segment	Demographics	Itinerary characteristics	Itinerary duration	Ship characteristics	Representative cruise lines
Luxury	Couples and singles with a taste for super luxury resorts on land, with no facilities for children	Focused on unusual ports and places; shore excursions represent an important profit generator	More than 10 days	• Smaller ships, most spacious accommodations with a high percentage offering views of the sea • Numerous suites • Highest crew-per-passenger ratio; more sophisticated interior design, with antiques and art collections of great value; and • Exclusive atmosphere	• Crystal Cruises • Hapag-Lloyd Kreuzfahrten • Hebridean Island Cruises • Peter Deilmann Kreuzfahrten • Radisson Seven Seas • Seabourn Cruise Line • Silversea Cruises

Source: UNWTO, 2019

Based on the scope and diversity of cruise line offerings, one can have confidence in the stability of the sector, and its ability to meet the needs of a world of different traveller profiles, budgets and needs of the segment.

6.2.6 Supply and demand profile for cruise tourism

The growing number of travellers wanting to take a cruise is steadily increasing year on year. One of the contributing factors to this growth in demand is the increase in repositioning cruising offerings. (Repositioning cruising is the moving of the ship from one sailing destination to another.) Factors such as cost-effective one-way flights, bucket-list experiential itineraries and cost advantages associated with repositioning cruising have helped set off this growth. As this demand steadily grows and global occupancy is high so does the ship building, launching, redeployment and new port infrastructure grow.

Despite this, innate centres of gravity exist in this segment as a result of regional geography, destination diversity, climate and overall tourism appeal.

6.2.6.1 Cruise tourism demand for the Western Cape

North America remains the dominant source market for cruise tourism (14.2 million travellers), followed by Western Europe (6.7 million travellers) and Asia (4.2 million travellers) as shown in Figure 63.

Figure 63: Where are passengers coming from?

Where are passengers coming from?

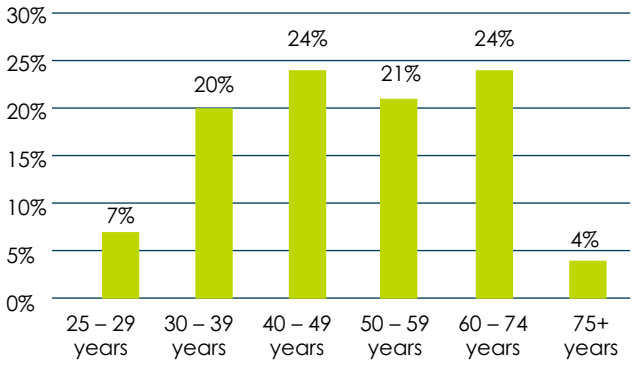
1. North America – **14 240 000**
2. Western Europe – **6 731 000**
3. Asia – **4 240 000**
4. Australasia/New Zealand/Pacific – **1 460 000**
5. South America – **883 000**
6. Scandinavia/Iceland – **225 000**
7. Eastern Europe – **213 000**
8. Africa – **154 000**
9. Middle East/Arabia – **111 000**
10. Caribbean – **56 000**
11. Central America – **47 000**

Because of the Caribbean's proximity to North America, price, weather and ease of travel diversity around the region, it is by far the most popular region for cruise itineraries. The Mediterranean offers similar advantages for the second-largest source market, the Western Europeans, offering varied itineraries with a short time frame, warm weather and affordable routes.

Source: CLIA State of Industry Presentation, 2020

As cruise liners offer a variety of lodgings and entertainment, they cater to a wide range of age groups. Cruise tourism is an ideal option for multi-generational travel as it provides a level of comfort and style for the whole family with memory-making experiences at various price points. Figure 64 reflects the diverse age group for cruising.

Figure 64: Age group for cruising



Source: Statista 2019

In 2018, CLIA established that the European outbound cruise tourism was broken down into markets as shown in Figure 65.

Figure 65: European outbound cruise tourism

Country	No. of cruisers	Share of source passengers	Ave. age	Ave. cruise length (Days)
Germany	2 223 000	31%	48	12
UK	2 009 000	27%	57	10
Italy	831 000	12%	43	6
Spain	530 000	7%	43	7
France	521 000	7%	48	7
Switzerland	154 000	2%	48	9
Austria	136 000	2%	50	8
Netherlands	113 000	2%	54	9
Norway	101 000	1%	45	5
Belgium	70 000	1%	53	7

Source: CLIA, 2018

Of the Europeans that travelled via cruise liner in 2018:

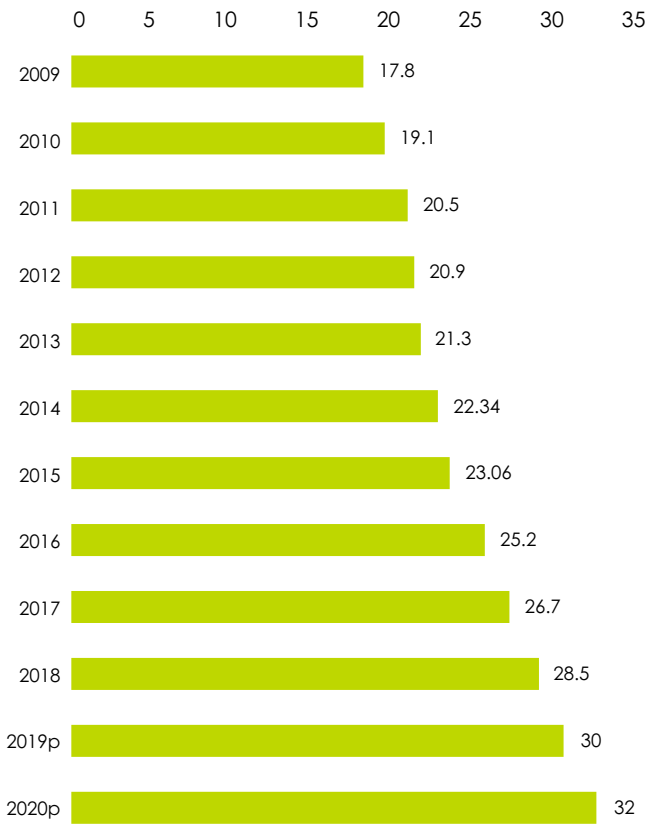
1. 219 000 went on cruises to Africa/Middle East
2. 209 200 went on world voyages or transatlantic voyages, many of which include Africa (particularly Cape Town) in their itineraries
3. The average age was 50
4. The average duration of the trip was 12 days
5. Germany, the UK, Italy, Spain and France were the main source markets
6. Time of travel: January to April

6.2.6.2 Cruise tourism supply in the Western Cape

Figure 66 captures a passenger capacity snapshot for 2020 which shows continued positive growth for the cruise industry, with a projected 32 million travellers for 2020, 6.7% up from 2019.

To meet this growing demand 19 new ships will debut in 2020 from CLIA Ocean Cruise Lines.

Figure 66: 2020 passenger capacity snapshot



Source: CLIA State of Industry Presentation, 2020

Cape Town port, operated by Transnet National Ports Authority (TNPA), is only a 10-minute drive from the city centre and 22km from the Cape Town International Airport.

While the port's cruise ship schedule sees vessels dock throughout the year, it is also a popular embarkation and disembarkation port for seasonal relocation cruises and around-the-world voyages.

Source: www.getaway.co.za

The port has received global recognition and was nominated for the 26th World Travel Awards in Africa's leading cruise port category (World Travel Awards, 2019).

In December 2015, V&A Waterfront officially signed a 20-year agreement to manage the terminal and undertook significant upgrades.

Facilities now available at the V&A Waterfront Cruise Terminal are:

1. Immigration processes
2. Universal accessibility (wheelchair and pram friendly, braille, guide dogs welcome)
3. Amenities: tourist information desk, restaurants, and free WiFi
4. Parking arrangements include 150 open bays for drop-and-go, and long-term parking is also available
5. Coach parking
6. Shuttle services accessible from the Silo District
7. Public transport access (i.e. MyCiti Bus)

The V&A Waterfront has plans to develop a passenger terminal. It is likely this will increase the number of cruise operators and tourists in Cape Town.

6.2.7 Barriers to growth

To develop cruise tourism as a platform for incremental tourism, economic and social impact requires careful evaluation from both a passenger and cruise company perspective.

Barriers to overcome are:

1. **Holiday days**
   With greater distances involved, African cruises typically cover more ground and are rarely less than 10 days long. It is not uncommon to see sailings lasting 20 days. For American travellers, this may pose a problem, as they are much more limited with their vacation days than the European traveller.

2. **Visas**
   Travellers will, of course, need a passport when embarking on a cruise, with different visa regulations impacting passengers from diverse home nations. South Africa's current immigration policies will create significant bottlenecks to disembarking procedures.

3. **Safety**
   Travellers need to know and trust that when visiting Cape Town their welfare is of the highest priority to the region, whether they visit for a day or more extended period pre/post-cruise. At present there is a reality around safety and security concerns when arriving in Cape Town.

4. **Core values**
   The host community may be agitated by large visitor flows, causing wear and tear on infrastructure, facilities, attractions and sites.

5. **Costly demands**
   From a cruise liner perspective, there will be demands and expectations for costly incentivisation and/or infrastructure provision.

6. **Port appeal**
   There is much to be considered for ports to be included in the itineraries. There is hard infrastructure, both operational and legal imperatives of port stays, but also pure destination port appeal and opportunities for cruise companies to market and benefit from the complementary activity.

As expressed by AccessCruise.com: "to attract the cruise lines remember it's more than just a nice new terminal. The larger lines with the bulk of the ships need more. They look at destination desirability, port satisfaction, and port value (cost vs. revenue). It's a blend of these items".

7. **Seasonality**
   The limited cruising season per annum from October/November to April cannot be extended to all year round.

8. **Limited time in port**
   Limited time in port condenses opportunities for local experience exposure if Cape Town is a stop-over.

9. **Connectivity**
   Limitations on land-based connectivity from port to other key points of interest.

10. **Onboard replenishment**
    Limitations of onboard supply replenishment and servicing, and health and safety concerns.

6.2.8 Summary

There is an opportunity for Cape Town and the Western Cape to take advantage of the steadily growing demand from consumers and supply from cruise liner companies. The destination and the tourism value chain need to understand how to leverage these additional visitors through onshore spending, shore excursions and tours and in-port spending from cruise companies themselves (i.e. purchase of certain food items, flowers, and wine).

Other opportunities include local crew replacing foreign crew and ship maintenance would provide additional employment opportunities for workers such as shipbuilders, welders and electricians.

6.3 Halal tourism

6.3.1 Introduction

The burgeoning growth of the global Muslim travel population signals an immense potential for Muslim travel-related products and services. According to the Mastercard-CrescentRating Global Muslim Travel Index 2019 (GMTI 2019), there were an estimated 140 million Muslim international travellers in 2018; this is projected to grow to 230 million by 2026. This market segment has been acknowledged as the 'third one billion' opportunity following the interest in Indian and Chinese billions (Janmohamed, 2016) and predicted to reach 30% of the world's travel population by 2050 (Pew Research Centre, 2017).

6.3.2 The benefits of Halal tourism

Halal tourism is a full-fledged industry which generates billions globally as the Muslim population continues to grow rapidly. There is an expectation that spending by Muslim travellers will rise to US$300 billion in 2026, with the number of Muslim travellers growing to 230 million (Global Muslim Travel Index (GMTI, 2019).

Muslim tourists are seeking destinations which meet their faith-based needs in terms of diet, dress or rituals. These needs such as Halal food, modest clothing, Halal banking, etc. have helped create and grow industries and businesses in destinations.

Political events around the world have led to Islamophobic sentiment and bias. This bias created against the Muslim community is mainly due to misunderstandings, lack of education on specific topics and lack of familiarity with the situation. By hosting Muslim tourists, destinations can go far in lessening the divide and decreasing the mistrust between Muslims and people of other cultures (The Benefits of Reaching Out to the Muslim Travel Market, CresentRating, 2017).

6.3.3 Supply and demand profile of Halal tourism

The growing number of Muslim travellers makes this one of the fastest-growing segments in the travel industry. In response to this increase in demand, the tourism industry is evolving to meet their dietary and religious needs from a supply side.

6.3.4 Sources of demand

Asia and the Pacific is the home to the largest population of Muslims. Of the world's 1.6 billion Muslims, an estimated 62% are in Asia, specifically in Indonesia (which has the most significant number of Islamic adherents in the world with an approximate 203 million), India, Pakistan, Bangladesh, Iran, China, Malaysia, Brunei Darussalam, Afghanistan and the Maldives (Pew Research, 2017). Also, smaller minorities are present in Thailand, Sri Lanka, Philippines, Cambodia, Singapore and Vietnam. The growing middle-class of Islamic countries in Asia and the Pacific with disposable income to travel has led to a lucrative outbound market of Muslim travellers that has been targeted by many 'non-Muslim' countries in the region.

Two key markets have been given prominence due to their growth potential, namely Muslim female travellers and Muslim millennial travellers (MMT).

6.3.4.1 Muslim female travellers

Muslim female travellers usually travel with their friends and family to seek new and authentic experiences. The Muslim identity and religious beliefs largely influence the Muslim women's tourism experiences, lifestyles and travel patterns and/or behaviours. By sharing their experiences, they hope to be an inspiration to others. They have a stronger influence in planning their trips, whether they are travelling alone, with their family or friends (Mastercard-CrescentRating, 2018). Muslim female travellers find it essential to have gender-segregated facilities such as swimming pools, gyms, spas or saunas for privacy as they are required to have appropriate modesty (Razzaq, Hall & Prayag, 2016). They would usually travel for leisure or to de-stress.

6.3.4.2 The Muslim millennials

The Muslim millennials are tech-savvy, self-empowered and enthusiastic consumers whose identities proudly encompass both faith and modernity. Muslim millennial travellers are distinct from previous generations and other millennial travellers, and have a unique set of values, needs and expectations in their travel consumption and expenditure patterns. They often spend more time and effort to conduct comprehensive research before making travel arrangements.

The Muslim millennial travellers mostly travel for leisure and holidays, experiencing local culture and heritage, and visiting friends and relatives (Mastercard-CrescentRating, 2017).

On average, they travel two to five times a year and are generally cost-conscious. When planning for trips, the top three factors that would influence their purchase decision are (1) cost of flights and accommodation, (2) safety and tourism concerns, and (3) availability of Halal food (Mastercard-CrescentRating, 2017).

Muslim millennial travellers prioritise affordability, location and free WiFi when selecting accommodation. Specifically, for Muslim-friendly services and facilities, they value availability and proximity of Halal food options, mosques and prayer facilities, and water-friendly toilet facilities. When booking for flights, ticket pricing, safety records, baggage allowances and Halal meal choices are important considerations. They also prefer Halal assured and certified places but would not mind dining in a seafood-only or vegetarian-only restaurant. Finally, they love to share their photos during their travels on social media pages such as Instagram, Facebook and Snapchat (Mastercard-CrescentRating, 2017).

6.3.5 Supply needs for faith-based Muslim travellers

There are a total of nine key faith-based needs that influence the purchase decision of Muslim travellers and therefore are essential to understand from a supply side in destinations that would want to service this market.

These needs are (1) Halal food, (2) prayer facilities, (3) water-friendly washrooms, (4) no Islamophobia, (5) social causes, (6) Ramadhan services, (7) local Muslim experiences, (8) recreational spaces with privacy, and (9) no non-Halal activities (Mastercard-CrescentRating, 2019).

These factors are grouped under three different sections (1) need to have, (2) good to have, and (3) nice to have to assist destinations and businesses in product development.

1. **Need to have** services are Halal food, availability of prayer facilities, water-friendly washrooms and a welcoming environment. Halal food is the most critical factor that a Muslim traveller needs when travelling. Muslims mostly want easily identified restaurants that are Halal-friendly.

Muslim travellers need the availability of prayer facilities with prayer rooms, qibla directions and water-friendly washrooms.

Thirdly, a water-friendly washroom is needed, as water plays an essential role in purity and cleanliness for Muslims. Now that there is the widespread availability of hand showers, bidets and Japanese-style toilets, it makes meeting this need more manageable for destinations and products.

With increasing hate crimes seen around the world, safety has become a primary concern for Muslim travellers. Muslim travellers are not encouraged to travel to destinations that are perceived to be unwelcoming (Mastercard-CrescentRating, 2019).

2. **Good to have** services include social causes, Ramadhan services and local Muslim experiences. Driven by faith and the global trend towards sustainability, Muslims are becoming more conscious of being socially responsible during their travels. Social causes include the ability to improve local living conditions, various green initiatives to support the environment and eco-friendly tourism practices.

Ramadhan services include the provision of Suhoor and Iftar meals, prayer facilities, services during Eid, among others. Even though Muslims are unlikely to be travelling over Eid, there are a few Muslims who wish to be away from home during this period. Destinations that want to attract Muslim travellers during this period need to be able to accommodate their special needs during this month.

Local Muslim experiences refer to experiences unique to the destination that allow Muslim travellers to connect with their Muslim identity and heritage. These types of experiences could include visiting Islamic heritage sites, interacting with local Muslim communities at a local mosque or experiencing the country with a Muslim tour guide (Mastercard-CrescentRating, 2019).

3. **Nice to have** services include recreational spaces with privacy and no non-Halal activities. Recreational areas with privacy refers to facilities such as swimming pools and gyms, beaches, spas and beauty salons that provide privacy for males and females. This privacy is especially important for females as they need to have appropriate modesty. No non-Halal activities are regarded as nice to have as some Muslims would prefer to avoid facilities and activities that serve alcohol or staying in a gambling resort.

6.3.6 Regional competitiveness as a Muslim-friendly destination

The global Muslim population is diverse and geographically distributed into segments in Muslim majority destinations as sizeable minorities in other destinations. According to the Regional Analysis of GMTI 2017 Scores, Africa is the third-best region that is friendly for Muslim travellers (Mastercard-CrescentRating, 2017) reflecting the region's concerted efforts in adapting and improving their services to attract the Muslim travel market.

South Africa is one of the destinations that is ranked well in the Global Muslim Tourism Index 2019. South Africa is ranked 29th under the GMTI global ranking and sixth under the top 10 non-Organisation of Islamic Cooperation (OIC) destinations. It is evident that South Africa is becoming more friendly for Muslim tourists. South Africa also ranks under the top 10 destinations in terms of ease of communications where there are outreach initiatives that include public education, media outreach and Muslim visitor guidebooks.

Cape Town has a rich Muslim history and heritage, with the Cape Malay Muslims making up around a quarter of the city's population. Cape Town ranked as the 4th-best travel destination for Muslim travellers in the 2017 Global Muslim Travel Index.

6.3.7 Key drivers for Muslim travellers

The key drivers for Muslim travellers coming to the Western Cape are:

1. **Mosques, Kramats and prayer rooms**

The Western Cape offers prayer rooms in major centres and airports and a large number of mosques are found across the province. Cape Town is home to the oldest mosque in South Africa, dating back an impressive 200 years. There are also several Kramats, known collectively as the Circle of Saints or the Ring of Kramats.

2. **Muslim community**

Cape Town was where South Africa's first Muslim settled and Cape Malay Muslims make up around a quarter of the city's population.

3. **Culture and heritage**

The Bo-Kaap area in Cape Town, which was formally known as the Malay quarter, is still home to many Muslims. In this area that is popular for its rainbow-like houses, there are more than seven mosques. The Bo-Kaap museum highlights the early contribution of Muslim settlers to Cape Town and is a significant attraction to Muslim travellers.

4. **Halal food options**

The Western Cape is renowned for its gastronomy offering. Recently, Halal restaurants in the Cape Town Metro serving these traditional dishes have been increasing, making it possible for Muslim travellers to

enjoy local food and observe their faith-based needs.

5. **Muslim-friendly hotels**
Major chains, such as Hilton and One&Only, have introduced Muslim-friendly rooms. These rooms include a prayer mat and the Qur'an. The rooms are also free of alcoholic drinks. All food prepared in the kitchen is made without alcohol and pork. The Hilton in the central business district of Cape Town is completely Halal.

6.3.8 Barriers to growth

With the increasing growth in the Muslim travel market, more businesses and destinations are now entering the industry to better cater to the needs of Muslim travellers by adapting their products and services.

1. There is a lack of tailor-made marketing collateral, and online content aimed to reach the Asia Pacific region and improve its overall global Halal destination branding.

2. There is a need for focused Halal tourism workshops frequently held with stakeholders. Workshops are required to help educate stakeholders with varying degrees of knowledge and ensure a focused approach and messaging.

3. There is a lack of tourist guides and hospitality workers who understand the faith-based needs of Muslim travellers and speak fluent Malay and Arabic.

4. There is a need for improved WiFi network coverage as Muslim travellers perceive staying connected as one of the significant factors when choosing a destination.

5. Lack of Halal certification and rating across Western Cape products limits the destination's ability to attract Halal travellers.

6.3.9 Summary

The opportunity for the Western Cape to take advantage of the steadily growing demand from Muslim travellers is immense. The destination and the tourism value chain needs to understand the nuances around faith-based travel and how to evolve their products to meet the need of this highly lucrative travel segment. South Africa already ranks high in

the Global Muslim Index 2019, and there is an opportunity to improve the awareness of the Western Cape to take advantage of this.

6.4 Sports and events tourism

6.4.1 Introduction

Sport, events and tourism have a natural synergy and well-hosted events amplified by a clear tourism strategy can have a positive impact on the economy, the destination's image and the lives of the citizens of the Western Cape.

6.4.2 Classification of sports and events tourism

For Tourism Blueprint 2030, sports and events tourism will be divided into three categories, namely Sports and Events tourism, Leisure Events tourism and Mega Events tourism (noting that business events has been covered in Section 5: Business events assessment).

Sports and Events tourism
Sports and Events tourism refers to travel with the purpose to either participate in a sporting event or spectate and support a specific sporting event.

Travel to undertake an activity such as golf, hiking or surfing, etc. can also be grouped as sports tourism.

A subsection of Sports and Events tourism can include tours of sporting stadiums or halls of fame, e.g. The Springbok Experience Rugby Museum at the V&A Waterfront in Cape Town, which sadly closed in 2019.

Leisure events tourism
Leisure events tourism refers to the propensity to travel to events, both on the part of dedicated events tourists who are motivated to travel for specific events and other tourists who attend events while away from home (Getz D., 2014, 'Festival and event tourism' in Jafari, J., Xiao H. (eds), Encyclopedia of Tourism, Springer, Cham).

Mega events tourism
Mega events tourism refers to travel with the purpose to participate in or support a major global event that has global awareness and participation, e.g. Olympics. These types of events encompass varied objectives for the country or city hosting them. These aims may be political, social or economic. The benefit of hosting a mega event is that it provides the host with the opportunity to show off its attractiveness and capacity to an international audience while building pride and unity domestically. Mega events also speed up infrastructure development and can, if leveraged correctly, prolong legacy for further tourism development (UNWTO, Maximising the benefit of mega events).

6.4.3 The benefits of Sports and Events tourism

When appropriately hosted, events have the potential to expand the visitor economy, provide media exposure, promote development, and stimulate infrastructure upgrades which include the emergence of new partnerships.

The hosting of significant events in a city, region or nation, therefore, presents a unique opportunity to rethink or reposition the destination. It's for this very reason that many countries view the successful hosting of events as a vehicle for growth. Therefore tourism bodies are devoting resources to attracting and supporting major events as part of a broader strategy (www.magneticstorm.co.za, 2018).

6.4.3.1 The benefits of Sports and Events tourism for the Western Cape

During 2019/20, Wesgro (the provincial tourism, trade and investment promotion agency for the Western Cape government) supported 39 regional events made up of leisure and sporting activities. These activities created temporary work for 4 007 people and spread over 230 000 mainly domestic visitors across all the districts. The economic impact, based on a daily spend of R910, was R208 million.

6.4.4 The integrated events strategy, the Cape of Great Events

Events are critical to the Western Cape's tourism ecosystem, and various types of events have been leveraged to grow the local economy and help promote and position the destination domestically and internationally to potential visitors.

The complexity and uniqueness of the events sector and the fact that it cuts across so many national, provincial, city and town resources means that there is no single government department or agency that is 'responsible' for events at a national, provincial, city or town level.

The Western Cape government's integrated events strategy (IES), which was approved by Cabinet in

2011, came into being as the provincial government recognised the importance of this sector and it helped facilitate collaboration between various levels of government and the events industry.

The Department of the Premier became the custodians of the strategy and worked closely with the Department of Cultural Affairs and Sport, the Department of Economic Development and Tourism and Wesgro to implement.

For Tourism Blueprint 2030, the Department of the Premier's office did a review of the 15-year integrated events strategy, and recommendations have been put forth as an amendment to the strategy for the next five years (2021 – 2026).

6.4.4.1 Strategic review survey results

A survey was conducted with event stakeholders to gauge the industry's feedback on the work of the integrated events strategy. Forty-one responses were received. Of these, 63.4% respondents were event organisers, 19.5% public officials and 9.8% were event industry service providers.

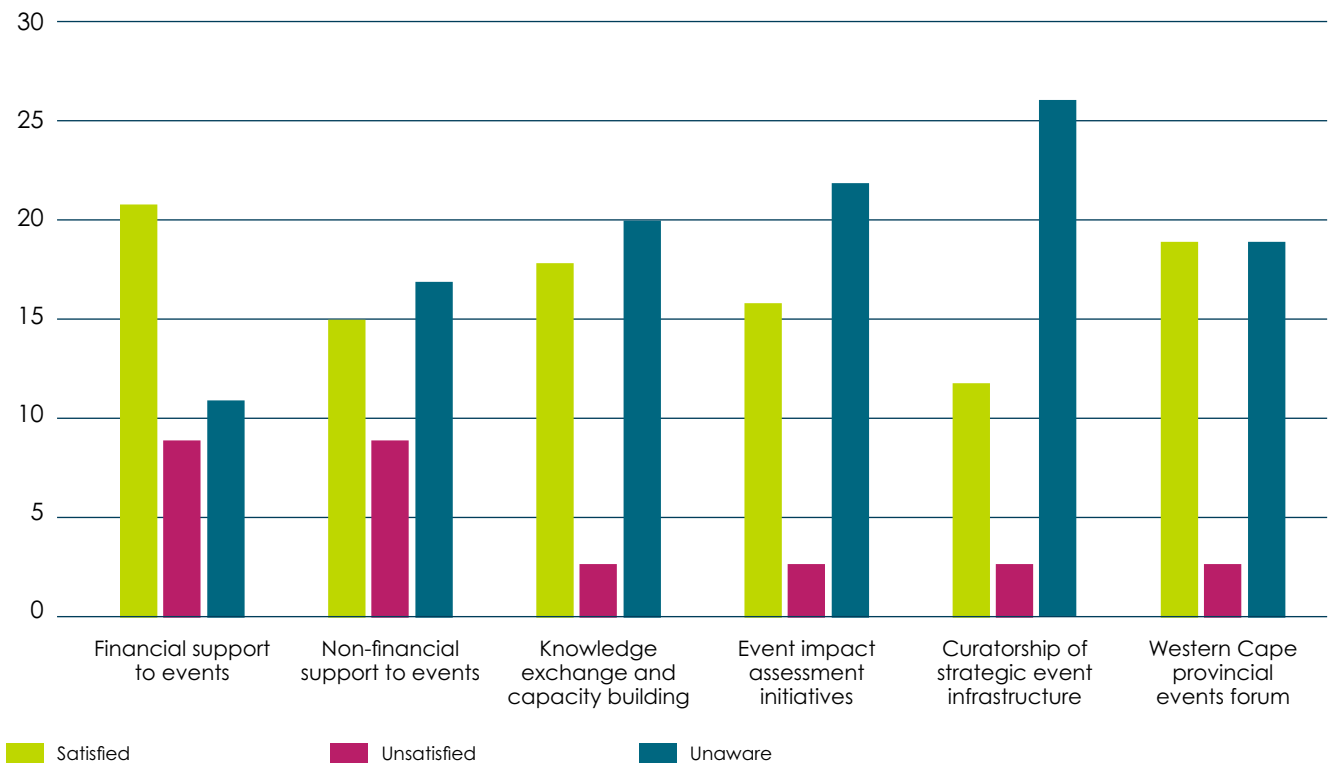
The following six projects as shown in Figure 67 were identified for respondents to rate their satisfaction levels:

1. Financial support to events
2. Non-financial support to events
3. Knowledge exchange and capacity building
4. Event impact assessment initiatives
5. Curatorship of strategic events infrastructure
6. Western Cape Provincial events forum

The majority of respondents were satisfied with financial support provided to events followed by the Western Cape provincial events forum and knowledge exchange and capacity building. Simultaneously the highest unsatisfactory level was also towards financial aid provided to events, followed by non-financial support to events.

The highest levels of unawareness were of the curatorship of strategic events infrastructure. This was followed by event impact assessment initiatives and knowledge exchange and capacity building.

Figure 67: Level of satisfaction with integrated events strategy projects



Source: Department of the Premier, 2019

6.4.4.2 Recommendations for the next five years of the integrated events strategy

The following section provides several recommendations to consider for the next five years:

1. In May 2018 Provincial Cabinet resolved for a consolidation of the provincial major events and funding. It is therefore recommended for each department to review their business concerning the integrated events strategy and assess the best fit. The provincial events forum is to engage the City of Cape Town and other municipalities on their successes and lessons and provide recommendations for a longer-term approach to event support for the Western Cape government to allow for seamless integration with budgetary processes.

2. Balancing business and environmental sustainability while dealing with a sector characterised by constant disruption is a critical challenge. Adapt operations to:

    - Accommodate environmental disasters such as the drought, Covid-19 and recent fires

    - Respond to internal red tape to provide more efficient support to the event sector, e.g. finance support to streamline administrative processes

3. Recalibrate strategic projects so that they:

    - Shift focus on unpacking and applying social and economic impacts to unravelling the environmental indicators

    - Acknowledge the need to be more responsive to environmental threats

    - Equip event organisers to deal with these challenges

    - Enhance the messaging of the knowledge exchange and capacity building programme. This programme is the primary platform used to facilitate knowledge exchange and best practice amongst event organisers

4. Consider multi-year budget sign off. It creates consistency and predictability of Western Cape government support to the event sector. It enables the provincial government to build on relationships and leverage for the participation of jewel event organisers in the capacitation and skills transfer programmes with emerging event organisers. It saves time as there is an automatic rollover of plans year-on-year.

5. Recognise a new event category as established events, which falls between jewel and incubator events.

6. Create online transversal reporting functionality of the events portal to cater for all departments so that any event organiser will be able to complete a post-event report which captures event-related data in a Western Cape government database.

7. Seek avenues to share the outcomes and actively pursue ways to integrate the Western Cape government's event impact assessment methodology and toolkit content with national and local government institutions who are interested in similar processes and outcomes.

8. The toolkit mentioned is a working document that responds to the changing needs of the industry. The recommendation is for the provincial government to select a cross section of events to test the toolkit, refine, analyse and provide consolidated data for a more substantial subset of events.

9. Establish a developmental programme evaluation process by having the provincial and municipal government, event owners and NGOs collaborate.

10. Institutionalise capacitation and skills programmes across the province and use issues of the day to shape the themes and content such as the practical considerations around managing events. Host these programmes online to make them more accessible and attract global audiences.

11. Institutionalise the annual Events Incubation Conference into a national flagship event for the sector. It is a one-of-a-kind product as it enables the industry to share and talk with each other.

12. Elevate the role of the provincial events forum to inform strategic and budgetary processes of the Western Cape government departments and agencies supporting events.

6.4.5 Summary

The events industry in the Western Cape is complex, and the integrated events strategy serves as a blueprint for government and the industry to work together to improve the events hosted by the destination and simultaneously improve event-related capacity. The strain on financial and human resources is a global industry phenomenon, and in the Western Cape, particularly, external environmental threats

have added additional stress.

One of the essential requirements to successfully implement the strategy and maintain alignment with provincial strategic priorities is to respond to the needs of the sector. As tourism is recognised as a provincial strategic priority and is embedded in the integrated events strategy, events are one of the key contributors to the tourism industry. The integrated events strategy will complement Tourism Blueprint 2030 and will improve the Western Cape government's work to maintain the status of the 'Cape of Great Events'.

6.4.6 The supply profile of the Western Cape

For event tourism, the **demand side** is the assessment of value in promoting a positive destination image (Getz 2008). The **supply side** contains the destination's development amenities and promotions to attract visitors to the destination and this serves as a catalyst for **tourism** development in the region (Getz 2008).

Therefore when building demand or planning and reviewing the supply side of events tourism, it is vital to take into consideration the critical roles of events for the province and plan with this in mind.

The crucial roles of events are:

1. **Building attractiveness**

Events have the ability to position the Western Cape favourably not only for tourism but also for trade and investment. Events can also build local pride.

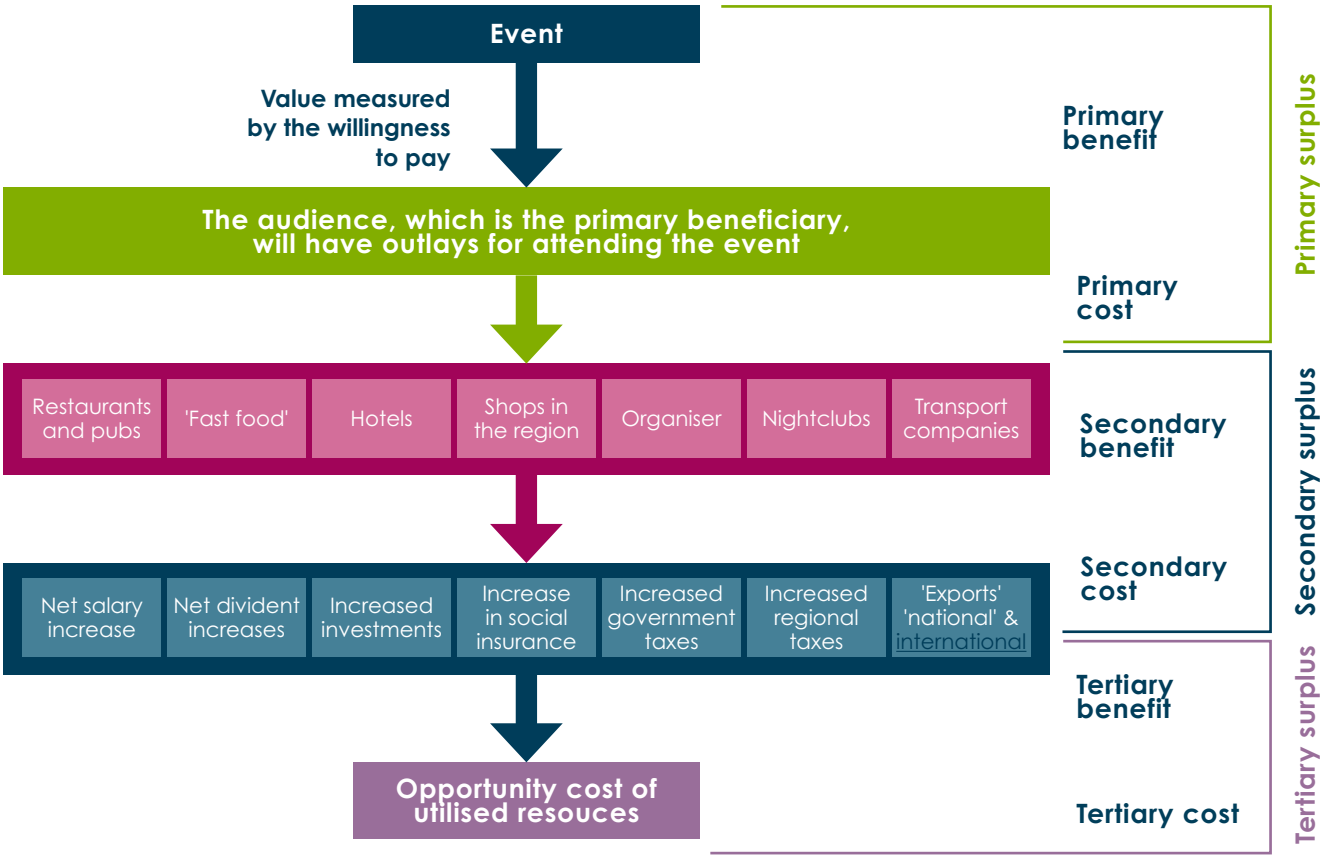
2. **Spend and spread**

The multiplier effect of tourism can come into force as events provide a reason for visitors to lengthen their stay, spend more and to travel out of the main cities and into the smaller towns. This multiplier effect can have a positive impact on a large portion of citizens across the province.

In Figure 68 we see how a destination can benefit from hosting mega events and the trickle-down effect thereof on the economy and citizens.

It must be noted that hosting events has both an economic benefit and cost to the host destination.

Figure 68: Multiplier effect of mega events



Source: Andersson, 1992

3. **Seasonality**

Certain types of event can negate the negative perception of not wanting to come to the Western Cape during winter due to 'bad weather'. For example, winter is one of the best times to surf in the Western Cape.

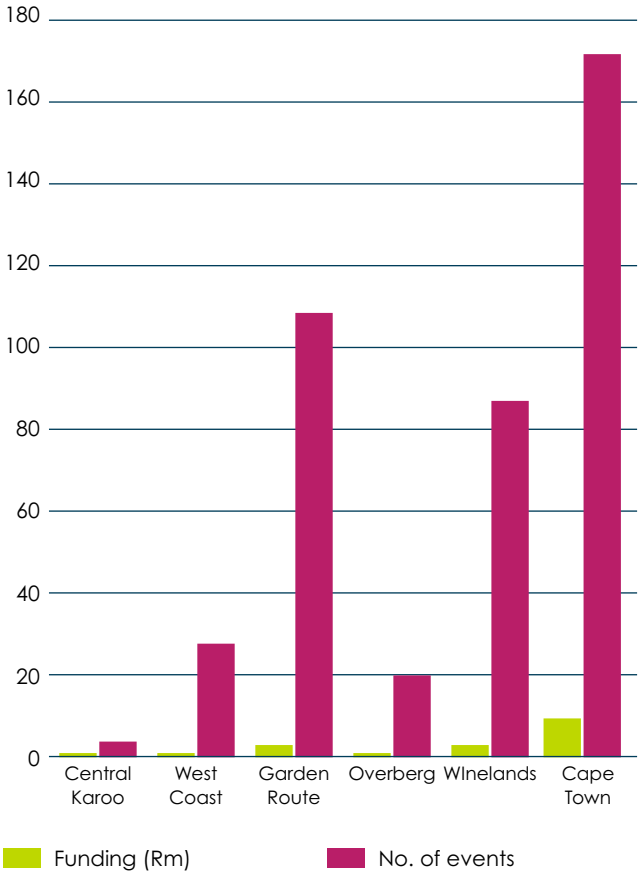
4. **Catalyst**

Events can stimulate infrastructure investment and urban renewal and boost opportunities to attractions and experiences within proximity or en route to the event.

6.4.7 District event support

The Department of Cultural Affairs and Sports (DCAS) reviewed their annual reports for five years (2014/15 – 2018/19) to complete the following information regarding the value and geographic spread of funding to events across the province as shown in Figure 69 below.

Figure 69: DCAS event funding over period 2014/15 – 2018/19



Source: DCAS, 2020

This exercise was conducted with six districts in the Western Cape over the five years outlined, and DCAS wish to highlight the following trends about funding:

1. With an emphasis on rural development, there has been a 22% decrease in its funding for major events in the Cape Town Metro, which has led to a 31% decrease to events supported.

2. The Garden Route District has seen a 57% increase from R270 000 to R615 000 in financial support with a 35% increase in events supported from 15 events in 2014/15 to 22 events in 2018/19.

3. The Winelands District has seen a 38% increase in financial support from R270 000 to R575 000.

4. The West Coast District has seen a 51% increase in financial support from R90 000 to R185 000, and an increase in the number of events supported from five events in 2014/15 to seven events in 2018/19.

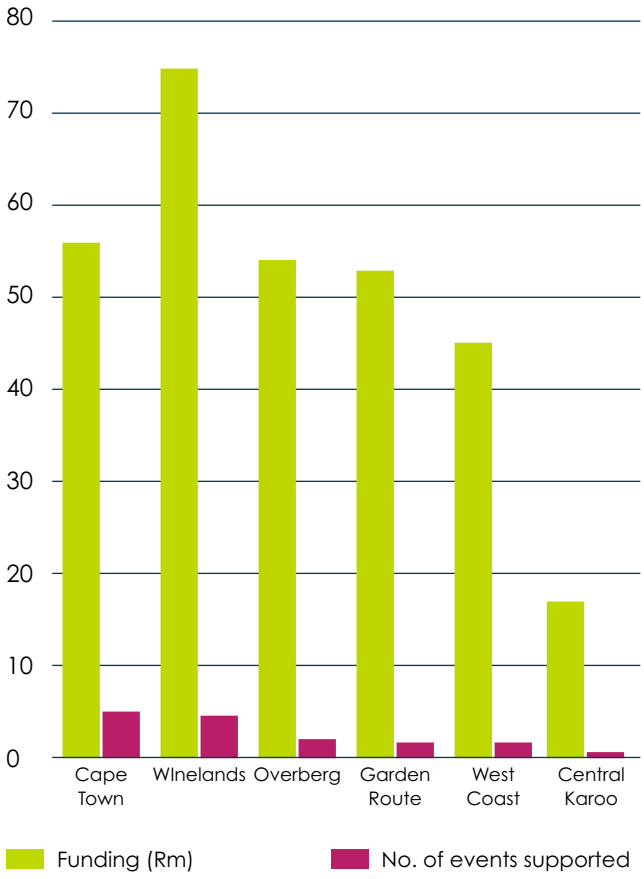
5. The Overberg District has seen 89% increase in financial support from R70 000 to R230 000, which has led to an increase in events supported from two events in 2015/16 to seven events in 2018/19.

6. The Central Karoo district has seen an increase in financial support from R15 000 in 2017/18 to R90 000 in 2018/19, which has led to an increase in events supported from one event in 2017 to three events in 2018/19.

It is evident that the increase of financial support from the Western Cape government for events in the province, together with federations, has had a direct influence on the increase of sporting activity in each of its districts.

Wesgro reviewed their annual reports for six years (2014/15 – 2019/20) to complete the following information regarding the value and geographic spread of funding to events across the province as shown in Figure 70 below.

Figure 70: Wesgro event funding over period 2014/15 – 2019/20



Source: Wesgro, 2020

Over six years, Wesgro has followed a funding scorecard to rate all applications received during their annual call for funding. The scorecard has three criteria:

1. Events applying for funding take place during the low season (April – September) will receive a higher weighting compared to events taking place in the high season

2. Events that promote the uniqueness of their district or town, e.g. a wine festival promoting local wineries in the Swartland, will receive a higher weighting compared to events that don't

3. Events that generate work for and use local suppliers from the district and town will receive a higher weighting compared to events that bring in suppliers from outside the district

Events that are selected for funding, may only receive funding for a maximum of three years.

The jewel events e.g. ABSA Cape Epic were used for marketing purposes to assist in positioning the destination as the Cape of Great Events through media hosting opportunities with South African Tourism.

6.4.8 Barriers to growth, industry review

Based on the workshops held with stakeholders the following six barriers to the growth of Sports and Events tourism have been identified:

1. Lack of funding to support events

2. Lack of data and knowledge transfer from and between events

3. Lack of data and curatorship of event infrastructure

4. Lack of marketing support

5. Lack of incubator event support

6. Lack of access to certain land (e.g. SANParks) and complex permitting for events

6.4.9 Gaps and opportunities for Sports and Events tourism

Table 16 is a list of gaps identified and possible opportunities to remove those gaps.

Table 16: Gaps and opportunities for Sports and Events tourism

Gap	Opportunity
Lack of financial and non-financial support for events. Financial and non-financial support includes the public sector resources (e.g. marketing and emergency services) to supporting event owners	**Financial support:** Build a dedicated events funding 'war chest' that financially supports from the jewel events to the incubator events, along with ring-fenced money to bid for mega events **Funding application:** Review the criteria across all public sector entities to ensure an enhanced event selection process **Non-financial support:** The provision of emergency services and dedicated public officials to support events
Knowledge exchange and capacity building	Grow the annual Events Incubation Conference Improve the Knowledge Exchange Programmes with events' organisers and the sharing of information Mentorship programme for event owners and planners
Events impact assessment (EIA) initiatives	Implement a standard EIA that can be used by any size or type of event
Western Cape provincial events forum	Leverage the work done by the forum and grow its role as the public sector interface with the sports and events industry in the Western Cape
Event infrastructure	Improve the curatorship of strategic event infrastructure
Marketing	Find innovative and effective ways to market events that (1) increase attendance and (2) position the destination as a leading events destination

6.4.10 Summary

Events create a sense of urgency and drive demand and expenditure; events drive geographic spread, and events can create work. The Western Cape events diary is full, with a leisure event or sports event happening nearly every weekend. There is, however, complexity and uniqueness because it cuts across so many national, provincial, city and town resources. This layered structure means that there is no single government department or agency that is 'responsible' for events at a national, provincial, city or town level. Initiatives such as the Integrated Events Strategy (IES) and the Western Cape Events Forum have helped bridge the gap, but further enhancement of these initiatives is required.

7 FOCUS AREA 4: International market potential

7.1 Introduction

One of the objectives of Tourism Blueprint 2030 is to help develop a strategy that will target international visitors who want to visit the Western Cape for numerous reasons. The interests and needs of this target group will best align with the Western Cape's unique experiential offering. It is evident from Section 4 | District assessment that the following tourism leisure experiences are the strongest and best known selling points for the Western Cape:

1. Culture and heritage experiences (e.g. Cradle of Human Culture Route or Robben Island Museum)
2. Food and wine experiences (e.g. Swartland Wine Route or The Elgin Market)
3. Nature-based experiences (e.g. The Whale Route or hiking)
4. Adventure experiences (e.g. Cross Cape Cycle Route or windsurfing)

For the purpose of this section, we have geographically segmented the markets as follows:

1. Africa
2. The Asia Pacific Region
3. Europe
4. Middle East
5. Americas

This chapter aims to develop a market potential matrix that will assist in a prioritisation process around the market selection. Selecting the right markets will go far in ensuring that we reach our objectives.

Following a strategy that concentrates on a few markets that offer a high return on investment for the Western Cape tourism economy has two main favouring factors:

Factor 1: Targeted selection
Focusing on a small number of markets that have shown stable performance. but also great growth potential, will ensure less wastage of funding and effort.

Factor 2: Psychographics
Each market concentrated on will have several different types of consumer sets we can reach, with overlaps, providing a better chance of remaining top of mind. However this is still dependent on a geographic segmentation in order to maximise reach.

7.2 Global travel decision making factors

"1.5 billion international tourist arrivals were recorded in 2019, globally. This is a 4% increase on the previous year, confirming tourism as a leading and resilient economic sector, especially given current uncertainties" (UNWTO, 2020).

This high demand for travel opens up many opportunities for the Western Cape. However, it is essential to remember that every tourist is different, and it is crucial to consider the following decision-making factors:

1. Strength of the potential tourist's currency in the Western Cape; will they get value for money or not? Value is impacted not only by prices in destination, but also the cost to travel to, and within the destination itself
2. The demographics combined with psychographics of potential tourists will impact their choice
3. The motivation for travel (i.e. business vs leisure vs both)
4. Format of the trip (i.e. group vs independent traveller)

5. State of travel infrastructure in the Western Cape

6. Potential tourist's knowledge of the Western Cape

7. Language spoken predominantly in the Western Cape

8. Accessibility to and transportation options within the Western Cape

9. The underlying image and reputation of Africa and South Africa will have an impact on a potential tourists' desire to visit the Western Cape

7.3 Methodology

The following methodology was used to review each geographic segment. Five indicators were selected based on current volume and value, accessibility, attractiveness, barriers and trends.

1. **Segmentation**. The value and volume of top current arrivals to the Western Cape from each market, including those showing high growth over the past four years but not necessarily in the top 10. Plus the value and volume of the top 3 – 5 outbound markets as per the continent selection were assessed.

2. **Accessibility**. The assessment of factors such as air access into Cape Town, access by air or ground further into the province, visa regulations and confidence to travel outside home countries formed the second part of the methodology.

3. **Attractiveness**. The attractiveness of the Western Cape's unique offering to each selected market was the third point of assessment.

4. **Barriers**. Barriers impacting their willingness to travel to the Western Cape was the fourth point. Barriers covered include language, distance to the Western Cape, visa requirements, xenophobia, safety and security concerns, lack of knowledge of the destination, cost to travel here and direct or non-direct flights.

5. **Trends**. The final point of assessment was the alignment of the trends (Section 3) with the market selection. Popular emerging patterns (i.e. trends) will differ in presence and priority across the world. Understanding the numerous nuances in each market to attract the 'right' traveller to the Western Cape will help in achieving the objective of getting more visitors to stay longer, spend more and explore further into the different districts.

7.4 The African context

The great appeal of the African continent (and what it is best known for) is the chance to see wildlife on the open plains, get close to mountain gorillas or climb Kilimanjaro. With more than 50 African countries to choose from, deciding where in Africa to go can become a daunting task for any traveller, experienced or not. Most excursions are sold as 'safari and sea' with Cape Town and the Western Cape forming part of what can be a multi-country holiday, aimed at first-time visitors.

The implication is that first-time visitors have very little time to spend in the Western Cape, and generally only do Cape Town and one other area, e.g. Stellenbosch or Hermanus.

Another implication of this is that for many years the Western Cape has primarily been sold to both first-time visitors and repeat visitors in this manner, resulting in less interest from tourists looking for new, exotic adventures on the African continent. There is also a new type of first-time tourist who is looking for experiences off the beaten track, and not necessarily the 'bucket-list' experiences.

7.4.1 The African context: image and reputation

The ability to grow demand and attract tourists to the Western Cape is heavily reliant on a tourist's willingness to travel to Africa based on their perceptions, word of mouth influences or previous experiences.

Figure 71 shows the most significant barriers to travel to Africa, as reported by Sabre in 2018.

Figure 71: What prevents international tourists from coming to Africa more?

Source: Sabre, 2018

Looking specifically at the Western Cape and its strengths that can assist in unlocking these barriers are:

Accessibility: Accessibility to the Western Cape has improved greatly due to an increase in direct routes from significant markets to Cape Town International Airport over the past few years as a result of the great work done by Cape Town Air access. However it is vital that at a national level, an open-air policy be implemented. The Western Cape's roads are well maintained, allowing for self-drives but a gap exists in the rail infrastructure and services to the tourism market.

Affordability: Due to a wide range of accommodation and experiences available at various price points across the Western Cape, the destination can offer an attractive and affordable value-for-money holiday option for international tourists. Value-for-money does not mean cheap, but rather that the Western Cape can provide the traveller with an excellent return on their spend. However the high cost of air travel to and within South Africa is a deterrent.

Iconography: Cape Town and the Western Cape has received many coveted international travel awards, making it a bucket list destination to many.

It is important to note that the concern in terms of lack of safety and security in the Western Cape is a major weakness affecting future arrivals to the destination.

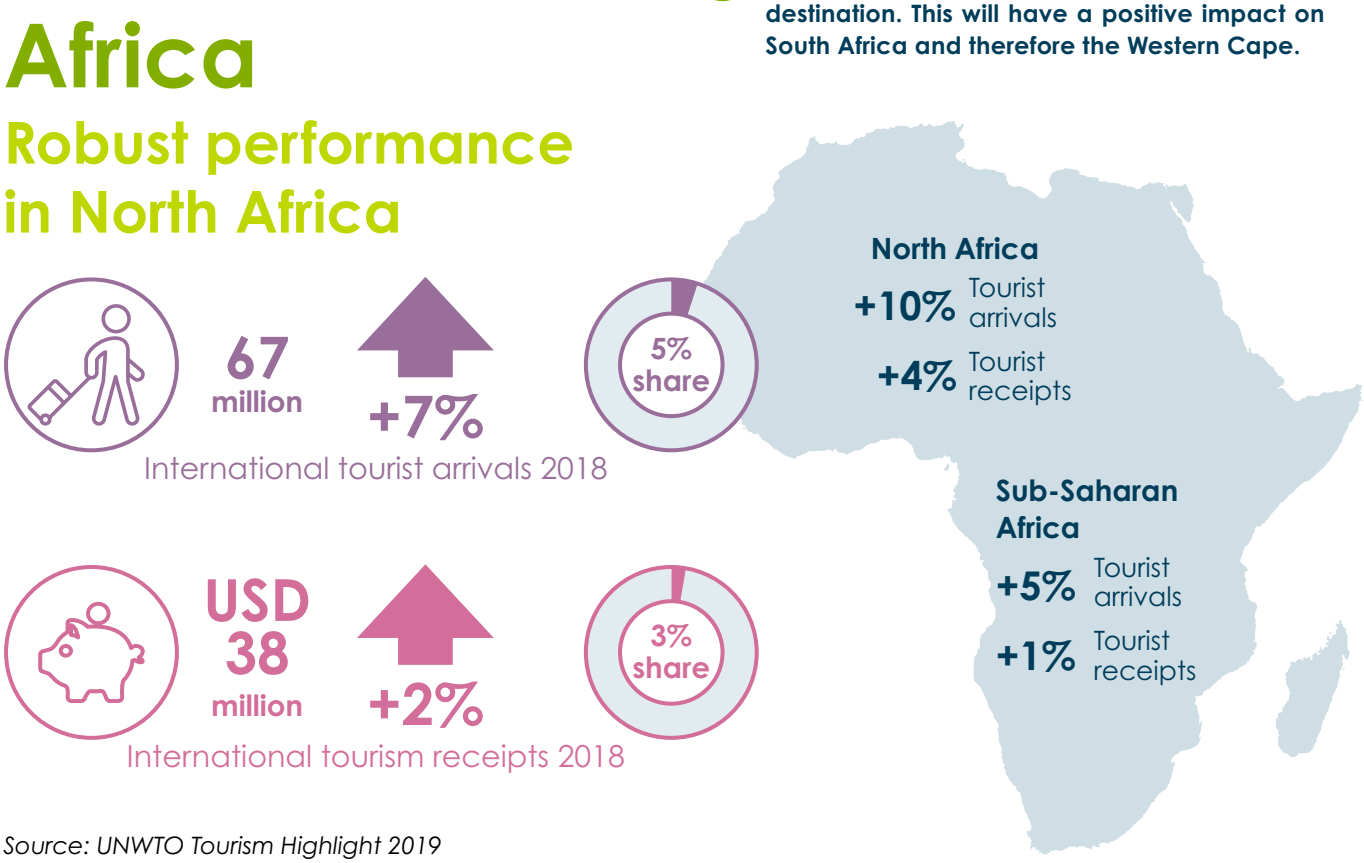
7.4.2 The African context: inbound arrivals

Robust performance in North Africa drives Africa's arrival growth, as indicated in Figure 72.

For the period 2018, Africa as a whole saw a 7% increase in arrivals, reaching 67 million, and this equated to a 2% increase to US$ 38 billion in international tourism receipts.

This continued growth shows that Africa as a continent is growing in opportunity as a tourism destination. This will have a positive impact on South Africa and therefore the Western Cape.

Figure 72: Africa inbound arrivals



Source: UNWTO Tourism Highlight 2019

7.5 Tourism demand

"Tourism demand is the total number of persons who travel or wish to travel to use tourist facilities away from their places of work and residence" (Mathieson and Wall, 1982).

According to Dr Nimit Chowdary from the Indian Institute of Tourism and Travel Management, tourism is a dynamic field with demand motivators ranging from push factors (e.g. need to attend a conference), facilitators (e.g. disposal income and annual leave available) to pull factors (e.g. iconography of an attraction or retail advertising). When approaching tourism demand, there are three approaches one must take into consideration: (1) The economic approach, (2) the psychological approach and (3) the geographic approach.

The **economic approach** takes into consideration the price a potential visitor is willing to pay for a product or service at a specific period in time and the idea of elasticity. What will happen to quantity demand when price and other things change?

The **psychological approach** takes into consideration the motivation and behaviour of the potential traveller and what personality traits and external influences will affect the willingness to buy a tourism product.

The **geographic approach** brings into perspective determinants of demand other than price (e.g. distance to travel) that will influence demand.

These concepts are taken into consideration in the methodology when reviewing the potential inbound markets as a source of tourism demand in the subsections below.

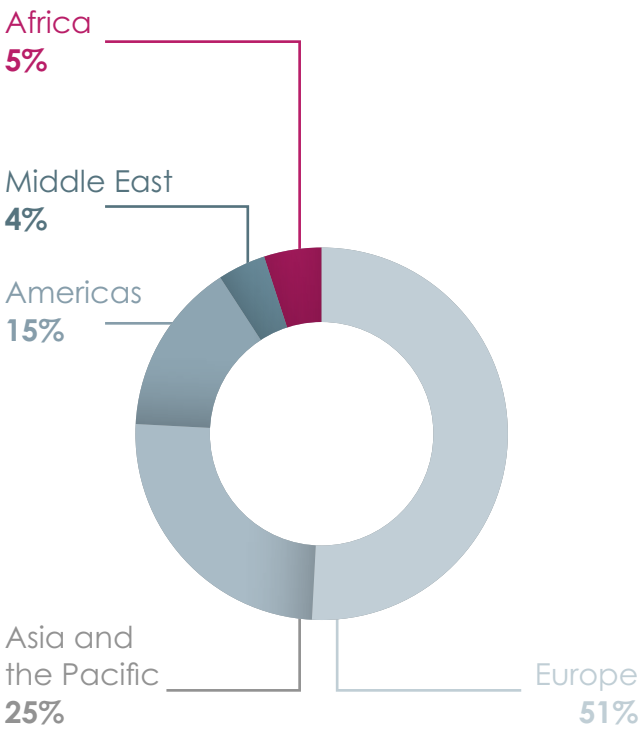
7.6 Source of demand: Africa

For an in-depth market analysis of Africa, please refer to the Annexures.

7.6.1 Overview of Africa as a source of demand

Africans travelling for leisure or business purposes only account for 5% of the global tourist market as shown in Figure 73. This means that the market is still relatively small in terms of opportunities, but has great future potential based on the rise of the middle income demographic in Africa who will have access to travel opportunities and the financial means to do so.

Figure 73: Africa share of global tourists, 2019



Source: UNWTO Tourism Highlights Report, 2019

7.6.2 Segmentation

Based on the methodology, Nigeria, Kenya, Ghana, Namibia and Angola are the markets selected for further assessment as shown in Table 17 below.

Table 17: Value and volume of top African markets for the Western Cape

Namibia is currently the Western Cape's top inbound market from Africa, but with a population size estimated at only 2.5 million (Worldometer, 2020) further growth is limited from this market. Markets such as Nigeria, Kenya and Angola are viewed as areas with an increase in the middle class who could emerge as potential customers for travel and tourism in the coming years.

Market	Outbound value (US$m) *	Volume to Western Cape**	Average spend per trip (Rm)**	Value to Western Cape (Rm) ***	Percentage growth (2014 – 2018) ***
Nigeria	US$4,614m	10 257	R22 600	R231m	+7.6%
Kenya	US$2,322m	3 418	R14 800	R50m	-24.0%
Ghana	US$1,273m	3 802	R16 400	R62m	64.2%
Namibia	US$0,430m	102 403	R5 500	R563m	14.4%
Angola	US$0,310m	16 788	R23 400	R393m	13.7%

*Source: *WTTC Country Impact Report, 2017; ** South African Tourism, 2019. *** Wesgro, 2020*

7.6.3 Accessibility to the Western Cape

Long-haul travel (with more multiple layovers) and cumbersome visa requirements all add to the time and financial investment in a trip. They will impact toutists' confidence to visit a destination. Table 18 below gives an overview of accessibility to the Western Cape for the selected African markets.

Based on this overview, it is noted that continued pressure is to be placed on the national government to progress the e-visa system and review existing regulations that are creating unnecessary barriers. A direct route to one of Africa's largest economies, Nigeria, should also be assessed.

Table 18: Accessibility to the Western Cape

Market	Air access	Visa exemption period*	Visa fee applicable*	Confidence to travel
Nigeria	Not direct	Visa required	Yes	Medium
Kenya	Direct	E-Visa	Yes	Low
Ghana	Not direct	Visa required	Yes	Medium
Namibia	Direct	90 days P/A	No	High
Angola	Direct	90 days P/A	Yes	High

*Department of Home Affairs (subject to change without notice)

7.6.4 Attractiveness of the Western Cape

The markets selected have a range of choice available to them; for this reason, it is essential that the Western Cape's offering aligns with each market's main reason for travelling to ensure that the destination attracts, retains and rewards the tourists with memorable and shareable experiences. The Western Cape's attractiveness to the selected markets is shown in Table 19 below.

Forms of tourism such as shopping, edu-tourism and medical tourism are main push factors, motivating travel for the selected African markets based on the overview of the chosen markets. Product development and marketing to promote these forms of tourism could provide opportunities to grow arrivals from selected markets to the Western Cape.

Table 19: Attractiveness of the Western Cape

Market	Main reason/s for travel	Western Cape current offering			
		Culture and heritage	Food and wine	Nature-based	Adventure
Nigeria	Shopping, events, education, business, VFR and medical tourism	No	No	No	No
Kenya	Education and medical tourism	No	No	No	No
Ghana	VFR, business, medical tourism and funerals	No	No	No	No
Namibia	VFR and medical tourism	No	No	No	No
Angola	Shopping, weddings, events, business, leisure and medical tourism	No	Yes	No	No

7.6.5 Barriers to travel to the Western Cape

Table 20 reviews five barriers to travel in the context of the African markets and travelling to South Africa and the Western Cape.

The barriers for potential tourists from Africa to the Western Cape is high. Issues such as high cost of travel by air or land (border costs) and safety and security concerns are significant deterrents for these markets. Increasing marketing and knowledge of the destination in the selected markets will go a long way in helping them understand what is on offer, thereby improving the value proposition.

Table 20: Barriers to travel

Market	Barriers				
	Language	Xenophobia	Safety and security concerns	Lack of knowledge of the destination	High cost to travel to the destination
Nigeria	No	Yes	Yes	Yes	High
Kenya	No	Yes	Yes	Yes	High
Ghana	No	Yes	Yes	Yes	High
Namibia	No	No	Yes	No	High
Angola	No	Yes	Yes	Yes	High

7.6.6 Trends and motivations for travel

By understanding the popular emerging trends as discussed in Section 3| forces and trends, impacting the African markets will aid in shaping the product offering and messaging for selected markets as shown in Table 21.

Digital connection, not digital detox, is a lead motivator for the African traveller and this should be taken into consideration in messaging and product development aimed at these markets.

Table 21: Trends and motivations

Market	Trends					
	My world in my hand	Personal and purposeful	Digital detox	JOMO	Multi-generational travel	Solo travel
Nigeria	Lead motivator	Lead motivator	Not relevant	Not relevant	Secondary motivator	Lead motivator
Kenya	Lead motivator	Lead motivator	Not relevant	Not relevant	Secondary motivator	Lead motivator
Ghana	Lead motivator	Lead motivator	Not relevant	Not relevant	Secondary motivator	Lead motivator
Namibia	Lead motivator	Lead motivator	Lead motivator	Not relevant	Secondary motivator	Lead motivator
Angola	Lead motivator	Lead motivator	Not relevant	Not relevant	Secondary motivator	Lead motivator

7.6.7 Recommendations

The following recommendations are proposed:

1. Nigeria, Kenya and Angola show favourable future growth opportunities and the tourism industry should find opportunities to 'hunt in a pack' to make a meaningful impact in these markets. Alignment with South African Tourism is key.

2. Continued pressure on visa restrictions and improving air access is required.

3. Forms of tourism such as edu-tourism, medical and shopping require dedicated focus for development and marketing to attract more visitors.

4. Safety and security is a major barrier for tourists wanting to come to South Africa, along with lack of knowledge of the destination.

5. Being connected is key to African tourists when in destination.

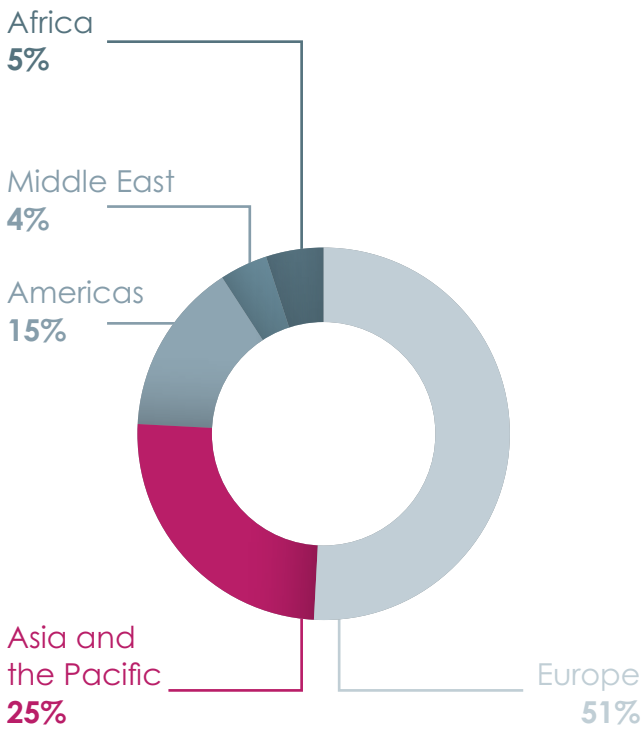
7.7 Source of demand: the Asia Pacific region

For an in-depth market analysis of the Asia-Pacific region, please refer to the Annexures.

7.7.1 Overview of the Asia Pacific region as a source of demand

The Asia Pacific region accounts for 25% of the total tourism market, as shown in Figure 74. Home to over half the world's population, the Asia Pacific region has undergone dramatic changes over the past decade, with economic, infrastructure and technological development fuelling rapid travel market growth. An expanding middle class and rising disposable income in Asia Pacific markets including China, India, Indonesia and Malaysia are driving increased travel demand. In addition to increasing domestic travel, a growing share of tourists is venturing abroad, many for the first time, with China's large and growing outbound travel population.

Figure 74: The Asia Pacific region of global tourists, 2019



Source: UNWTO Tourism Highlights Report, 2019

7.7.2 Segmentation

Based on the methodology, China, Australia, Singapore, India and Japan are the markets selected for further assessment as shown in Table 22 below.

China, India and Singapore all show significant growth over the past four years to the Western Cape. Projections show China to be the largest outbound travel market by 2021 (excluding trips to Macau and Hong Kong), followed by South Korea and India (South Korea has very low inbound arrivals to the Western Cape).

Table 22: Value and volume of top Asia Pacific markets for the Western Cape

Market	Outbound value (US$ bn) *	Volume to Western Cape**	Average spend per trip (R) **	Value to Western Cape (Rm)***	% Growth (2014 – 2018) ***
China	US$277bn	57 868	R18 800	R450m	19.6%
Australia	US$37bn	53 843	R18 900	R809m	4.1%
Singapore	US$24.5bn	4 997	R16 400	R78m	45.1%
India	US$18.4bn	31 412	R15 700	R304m	25.0%
Japan	US$18.2bn	11 665	R15 300	R148m	-17.4%

*Source:: * UNWTO, 2018 **South African Tourism, 2019, *** Wesgro,2020*

7.7.3 Accessibility to the Western Cape

Long-haul travel (with more multiple layovers) and cumbersome visa requirements all add to the time and financial investment in a trip. They will impact tourists' confidence to visit a destination. Table 23 below gives an overview of accessibility to the Western Cape for the selected Asia Pacific markets.

Based on this overview, it is noted that continued pressure is to be placed on the national government to progress the e-visa system and review existing regulations that are creating unnecessary barriers. A direct route to markets such as India or China would also be favourable.

Table 23: Accessibility to the Western Cape

Market	Air access	Visa exemption period*	Visa fee applicable*	Confidence to travel
China	Not direct	Visa required	Yes	Medium
Australia	Not direct	90 days	Yes	High
Singapore	Direct	90 days	Yes	High
India	Not direct	E-visa	No	Medium
Japan	Not direct	90 days	Yes	Medium

**Department of Home Affairs (subject to change without notice)*

7.7.4 Attractiveness of the Western Cape

The markets selected have a range of choice available to them. For this reason, it is essential that the Western Cape's offering aligns with each market's main reason for travelling to ensure that the destination attracts, retains and rewards the tourists with memorable and shareable experiences. The Western Cape's attractiveness to the selected markets is shown in Table 24 below.

There is a strong alignment between what tourists from China, Australia, Singapore, India and Japan want and what the Western Cape as a destination has to offer. The opportunity is focused marketing aimed at target consumer groups to get high return on investment.

Table 24: Lead Motivator

Market	Main reason/s for travel	Western Cape offering			
		Culture and heritage	Food and wine	Nature-based	Adventure
China	Shopping Food & Wine Nature Culture Adventure Romantic	Yes	Yes	Yes	Yes
Australia	Culture Food & wine Nature Adventure	Yes	Yes	Yes	Yes
Singapore	Culture Nature Food & wine Value for money	Yes	Yes	Yes	Yes
India	Nature Value for money Adventure	Yes	Yes	Yes	Yes
Japan	Food & wine Culture Nature Value for money	Yes	Yes	Yes	No

7.7.5 Barriers to travel to the Western Cape

Table 25 reviews five barriers to travel in the context of the Asia Pacific markets and travelling to South Africa and the Western Cape.

The major barriers deterring potential tourists from Asia Pacific to the Western Cape is the high cost of travel to the destination and safety and security concerns.

Table 25: Barriers to travel

Market	Barriers				
	Language	Xenophobia	Safety and security concerns	Lack of knowledge of the Western Cape	High cost of travel to the Western Cape
China	Yes	No	Yes	Yes	Yes
Australia	No	No	Yes	No	Yes
Singapore	Yes	No	Yes	Yes	Yes
India	No	No	Yes	Yes	Yes
Japan	Yes	No	Yes	Yes	Yes

7.7.6 Trends and motivations for travel

By understanding the popular emerging trends as discussed in Section 3| forces and trends, impacting the Asia Pacific markets will aid in shaping the product offering and messaging for selected markets as shown in Table 26.

Digital Detox and JOMO are not relevant to these markets, who like to be connected digitally and travel in large family groups.

Table 26: Trends and motivations

Market	Trends					
	My world in my hand	Personal and purposeful	Digital detox	JOMO	Multi-generational travel	Solo travel
China	Lead motivator	Lead motivator	Not relevant	Not relevant	Lead motivator	Lead motivator
Australia	Lead motivator	Lead motivator	Not relevant	Not relevant	Lead motivator	Lead motivator
Singapore	Lead motivator	Lead motivator	Not relevant	Not relevant	Lead motivator	Lead motivator
India	Lead motivator	Lead motivator	Not relevant	Not relevant	Lead motivator	Lead motivator
Japan	Lead motivator	Lead motivator	Not relevant	Not relevant	Lead motivator	Lead motivator

7.7.7 Recommendations

The following recommendations are proposed:

1. China, India and Singapore show favourable future growth opportunities and the tourism industry should find opportunities to 'hunt in a pack' to make a meaningful impact in these markets. Alignment with South African Tourism is key.

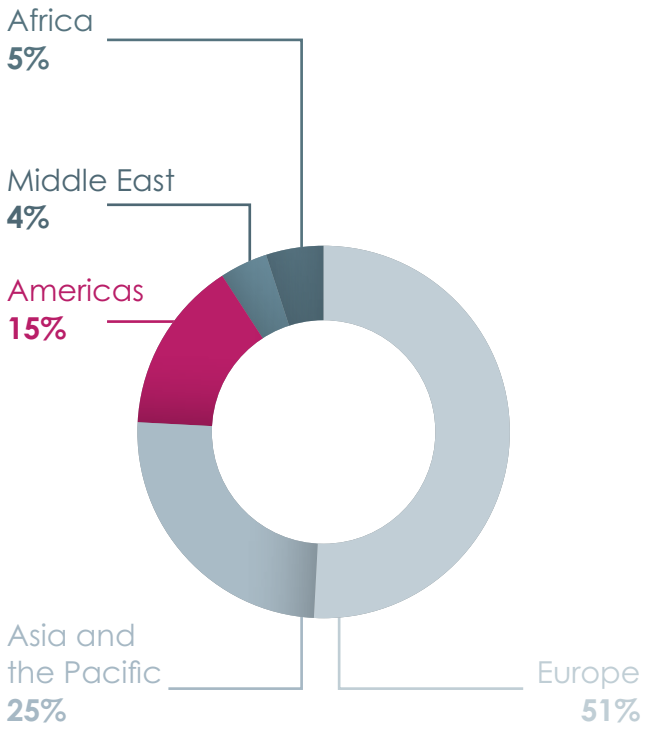
2. Continued pressure on visa restrictions and improving air access is required.

3. Marketing campaigns aimed at niche consumer segments aligned to specific forms of tourism

4. Safety and security is a major barrier for tourists wanting to come to South Africa, along with lack of knowledge of the destination

5. Being connected is key for Asia Pacific tourists when in destination

Figure 75: The Americas market share of global tourists, 2019



Source: UNWTO Tourism Highlights Report, 2019

7.8 Source of demand: Americas

For an in-depth market analysis of the Americas, please refer to the Annexures.

7.8.1 Overview of the Americas as a source of demand

The region of the 'Americas' represents a significant global geo-centre of not only land mass but also a highly diverse population of vibrant, highly diverse, influenced array of nations, cultures, languages, economies, histories, political systems and future possibilities. The Americas is made up of North, South and Central America, along with the Caribbean Islands. The Americas combined make up 15% of global tourists, making them the third-largest region after Asia-Pacific and Europe as shown in Figure 75.

7.8.2 Segmentation

Based on the methodology, the United States, Canada, Brazil, Argentina and Chile are the markets selected for further assessment as shown in Table 27 below.

Table 27: Value and volume of top Americas markets for the Western Cape

Market	Outbound value (US$bn)*	Volume to Western Cape**	Average spend per trip (R) **	Value to Western Cape (Rm) ***	% Growth (2014 – 2018) ***
USA	US$144bn	192 629	R23 400	R2 708m	27.8%
Canada	US$ 33bn	36 555	R19 700	R454m	8.5%
Brazil	US$ 18.3bn	45 446	R18 600	R480m	148.2%
Argentina	US$ 10.7bn	11 561	R14 200	R93m	141.6%
Chile	US$ 2.3bn	3 231	R17 000	R55m	156.0%

*Source: * UNWTO, 2018 **South African Tourism, 2019, Wesgro, 2020*

Although Chile and Argentina have shown significant growth to the Western Cape over the past four years, the baseline is low, and the current indicators showed a decline of 4% in outbound travel from Argentina over the period 2014 – 2018 (Air Navigation Company). With Brazil's economy stabilising after their financial crisis, it shows future growth potential.

Key focus areas for South African tourism in the Americas are:

1. **USA (NYC, LA, Chicago, Washington DC, Atlanta)**
2. **Canada (Toronto, Vancouver, Montreal)**
3. **Brazil (Baiha, South East, South and Centre West)**
4. **Argentina (Buenos Aires, Santa Fé and Cordoba)**
5. **Chile (Santiago)**

7.8.3 Accessibility to the Western Cape

Long-haul travel (with more multiple layovers) and cumbersome visa requirements all add to the time and financial investment in a trip. They will impact tourists' confidence to visit a destination. Table 28 below gives an overview of accessibility to the Western Cape for the selected Americas markets.

Air access is the one area of accessibility that requires focus in terms of opening up the Americas.

Table 28: Accessibility to the Western Cape

Market	Air access	Visa exemption period*	Visa fee applicable*	Confidence to travel
USA	Direct	90 days	Yes	High
Canada	Not direct	90 days	Yes	Medium
Brazil	Not direct	90 days	No	High
Argentina	Not direct	90 days	No	High
Chile	Not direct	90 days	No	High

**Department of Home Affairs (subject to change without notice)*

7.8.4 Attractiveness of the Western Cape

The markets selected have a range of choice available to them. For this reason, it is essential that the Western Cape's offering aligns with each market's main reason for travelling to ensure that the destination attracts, retains and rewards the tourists with memorable and shareable experiences. The Western Cape's attractiveness to the selected markets is shown in Table 29 below.

There is a strong alignment between what tourists from the USA, Canada, Brazil, Argentina and Chile want and what the Western Cape as a destination has to offer. The opportunity is focused marketing aimed at target consumer groups to get high return on investment.

Table 29: Attractiveness of Western Cape

		Western Cape offering			
Market	Main reason/s for travel	Culture and heritage	Food and wine	Nature-based	Adventure
USA	Nature, culture, cruise, adventure food & wine, 'afro-descendants'	Yes	Yes	Yes	Yes
Canada	Nature, culture, adventure, shopping and food & wine	Yes	Yes	Yes	Yes
Brazil	Culture, adventure, food & wine	Yes	Yes	No	Yes
Argentina	Culture, adventure, food & wine	Yes	Yes	No	Yes
Chile	Culture, adventure, food & wine	Yes	Yes	No	Yes

7.8.5 Barriers to travel to the Western Cape

Table 30 reviews five barriers to travel in the context of the Americas and travelling to South Africa and the Western Cape.

The major barriers deterring potential tourists from the Americas to the Western Cape is the high cost of travel to the destination. Safety and security concerns are a major deterrent for the United States tourist. For the South America markets, the level of English competence of tourists may challenge their experience in the destination.

Table 30: Barriers to travel

Market	Barriers				
	Language	Xenophobia	Safety and security concerns	Lack of knowledge of the Western Cape	High cost to travel to the Western Cape
USA	No	No	Yes	Yes	Yes
Canada	No	No	Yes	Yes	Yes
Brazil	Yes	No	No	Yes	Yes
Argentina	Yes	No	No	Yes	Yes
Chile	Yes	No	No	Yes	Yes

7.8.6 Trends and motivations for travel

By understanding the popular emerging trends as discussed in Section 3| forces and trends, impacting the Americas will aid in shaping the product offering and messaging for selected markets as shown in Table 31.

These market all have a strong travel culture and historical roots, especially amongst African Americans, and the admiration for Nelson Mandela is strong across all markets, proving a strong sense of personal and purposeful travel to the destination.

Table 31: Trends and motivations

Market	Trends					
	My world in my hand	Personal and purposeful	Digital detox	JOMO	Multi-generational travel	Solo travel
USA	Lead motivator	Lead motivator	Lead motivator	Secondary motivator	Lead motivator	Lead motivator
Canada	Lead motivator	Lead motivator	Lead motivator	Secondary Motivator	Lead motivator	Lead motivator
Brazil	Lead motivator	Lead motivator	Lead motivator	Secondary motivator	Lead motivator	Lead motivator
Argentina	Lead motivator	Lead motivator	Lead motivator	Secondary motivator	Lead motivator	Lead motivator
Chile	Lead motivator	Lead motivator	Lead motivator	Secondary motivator	Lead motivator	Lead motivator

7.8.7 Recommendations

The following recommendations are proposed:

1. The United States, Canada and Brazil show favourable future growth opportunities and the tourism industry should find opportunities to 'hunt in a pack' to make a meaningful impact in these markets. Alignment with South African Tourism is key.

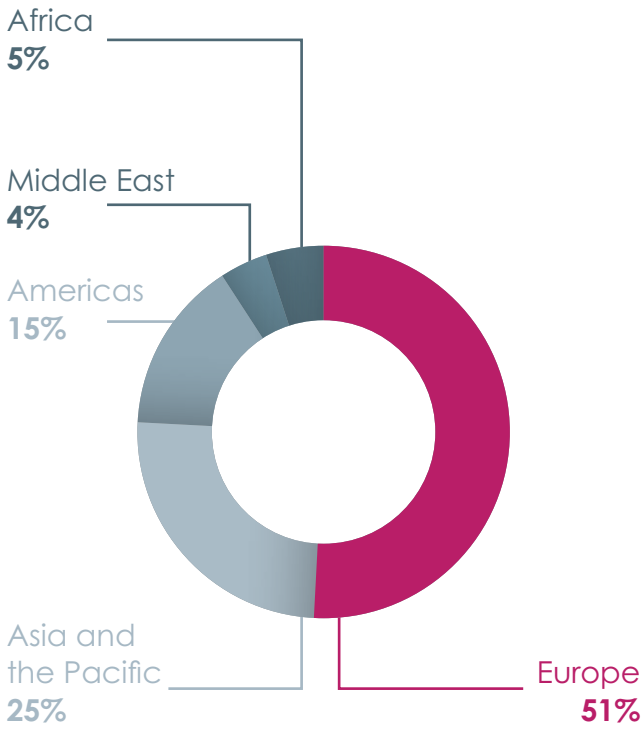
2. Continued pressure on improving air access is required.

3. Marketing campaigns aimed at niche consumer segments aligned to specific forms of tourism.

4. The high cost of travel to the destination, along with lack of knowledge of the destination, are deterrents. Safety and security is a major concern for the US market.

5. Opportunities for marketing exist around the promotion of personal and purposeful travel.

Figure 76: The European market share of global tourists, 2019



Source: UNWTO Tourism Highlights Report, 2019

7.9 Source of demand: Europe

For an in-depth market analysis of Europe, please refer to the tourists' Annexures.

7.9.1. Overview of the Europeans as a source of demand

Europe represents the largest share of global tourists at 51%. It represents the most established, dense, diverse set of tourists, and is also home to the world's first tourists.

7.9.2 Segmentation

Based on the methodology, Germany, United Kingdom, France, Italy and the Netherlands are the markets selected for further assessment as shown in Table 32 below.

The Western Cape's traditional European source markets have shown favourable growth over the past few years and remain priority markets for the region.

Table 32: Value and volume of top European markets for the Western Cape

Market	Outbound value (US$bn)*	Volume to Western Cape**	Average spend per trip (R) **	Value to Western Cape (Rm) ***	% Growth (2014 – 2018) ***
Germany	US$94bn	213 054	R19 700	R2 981m	16.2%
UK	US$76bn	250 429	R19 700	R4 004m	-2.7%
France	US$48bn	102 007	R18 900	R1 298m	36.8%
Italy	US$30bn	38 662	R19 800	R566m	16.0%
Netherlands	US$21.2bn	79 045	R21 400	R1 262m	-21.1%

*Source: * UNWTO, 2018 **South African Tourism, 2019, ***Wesgro, 2020*

7.9.3 Accessibility to the Western Cape

Long-haul travel (with more multiple layovers) and cumbersome visa requirements all add to the time and financial investment in a trip. They will impact tourists' confidence to visit a destination. Table 33 below gives an overview of accessibility to the Western Cape for the selected European markets.

Accessibility to the Western Cape for the selected markets is favourable. Only Italy does not have a direct route to Cape Town International Airport.

Table 33: Accessibility to the Western Cape

Market	Air access	Visa exemption period*	Visa fee applicable*	Confidence to travel
Germany	Direct	90 days	Yes	High
UK	Direct	90 days	No	High
France	Direct	90 days	Yes	High
Italy	Not direct	90 days	Yes	High
Netherlands	Direct	90 days	Yes	High

**Department of Home Affairs*
(subject to change without notice)

7.9.4 Attractiveness of the Western Cape

The markets selected have a range of choice available to them. For this reason, it is essential that the Western Cape's offering aligns with each market's main reason for travelling to ensure that the destination attracts, retains and rewards the tourists with memorable and shareable experiences. The Western Cape's attractiveness to the selected markets is shown in Table 34 below.

As the United Kingdom and Europe are connected through several regional forces that have a direct impact of the desire, ability and opportunity to travel, they think and act in very similar ways. The attractiveness of a destination is fuelled through its ability to be 'the hottest', 'the must see' the 'bucket list'. Destinations that have a strong pull factor that provides the traveller with bragging rights and the opportunity to explore and discovery will have the greatest appeal.

There is a strong alignment between what tourists from Germany, the United Kingdom, France, Italy and the Netherlands want and what the Western Cape as a destination has to offer. The opportunity is focused marketing aimed at target consumer groups to get high return on investment and re-inventing the proposition of the province to ensure it remains a bucket list destination.

Table 34: Attractiveness of the Western Cape

		Western Cape offering			
Market	**Main reason/s for travel**	**Culture and heritage**	**Food and wine**	**Nature-based**	**Adventure**
Germany	Bucket list Root (connection to African sub-continent) Shores and beachlines Wellness Medical Food & Wine Sport	Yes	Yes	Especially shores and beachlines	Especially bucket list
UK	Bucket list Root (connection to African sub-continent) Shores and beachlines Wellness Medical Food & Wine Sport	Yes	Yes	Especially shores and beachlines	Especially bucket list
France	Bucket list Root (connection to African sub-continent) Shores and beachlines Wellness Medical Food & Wine Sport	Yes	Yes	Especially shores and beachlines	Especially bucket list

Market	Main reason/s for travel	Western Cape offering			
		Culture and heritage	Food and wine	Nature-based	Adventure
Italy	Bucket list Root (connection to African sub-continent) Shores and beachlines Wellness Medical Food & Wine	Yes	Yes	Especially shores and beachlines	Especially bucket list
Netherlands	Bucket list Root (connection to African sub-continent) Shores and beachlines Wellness Medical Food & Wine Sport	Yes	Yes	Especially shores and beachlines	Especially bucket list

7.9.5 Barriers to travel to the Western Cape

Table 35 reviews five barriers to travel in the context of the European markets and travelling to South Africa and the Western Cape.

The major deterrent in terms of travel to the Western Cape for these selected markets is the concern regarding safety and security when in destination.

Table 35: Barriers to travel

Market	Barriers				
	Language	Xenophobia	Safety and security concerns	Lack of knowledge of the Western Cape	High cost to travel to the Western Cape
Germany	No	No	Yes	No	Yes
UK	No	No	Yes	No	Yes
France	No	No	Yes	No	Yes
Italy	No	No	Yes	No	Yes
Netherlands	No	No	Yes	No	Yes

7.9.6 Trends and motivations for travel

By understanding the popular emerging trends as discussed in Section 3| forces and trends, impacting the European markets will aid in shaping the product offering and messaging for selected markets as shown in Table 36.

The opportunity to slow down, take a digital detox (while being connected when they want), often on their own are major trends and motivations driving these selected markets travel choices.

Table 36: Trends and motivations

Market	Trends					
	My world in my hand	Personal and purposeful	Digital detox	JOMO	Multi-generational travel	Solo Travel
Germany	Lead motivator	Lead motivator	Lead motivator	Lead motivator	Secondary motivator	Lead motivator
UK	Lead motivator	Lead motivator	Lead motivator	Lead motivator	Secondary motivator	Lead motivator
France	Lead motivator	Lead motivator	Lead motivator	Lead motivator	Secondary motivator	Lead motivator
Italy	Lead motivator	Lead motivator	Lead motivator	Lead motivator	Secondary motivator	Lead motivator
Netherlands	Lead motivator	Lead motivator	Lead motivator	Lead motivator	Secondary motivator	Lead motivator

7.9.7 Recommendations

The following recommendations are proposed:

1. All markets show favourable future growth opportunities, however, further analysis would need to be done in terms of the Netherlands to understand what has driven the decline from that market. The tourism industry should find opportunities to 'hunt in a pack' to make a meaningful impact in these markets. Alignment with South African Tourism is key

2. Accessibility to the Western Cape is good, and only Italy does not have a direct route

3. Marketing campaigns aimed at niche consumer segments aligned to specific forms of tourism drive high desirability based on 'must see', 'bucket list' experiences

4. Safety and security is a major deterrent

5. Slowing down, digital detox and solo travel are all strong trends driving these markets' travel behaviour

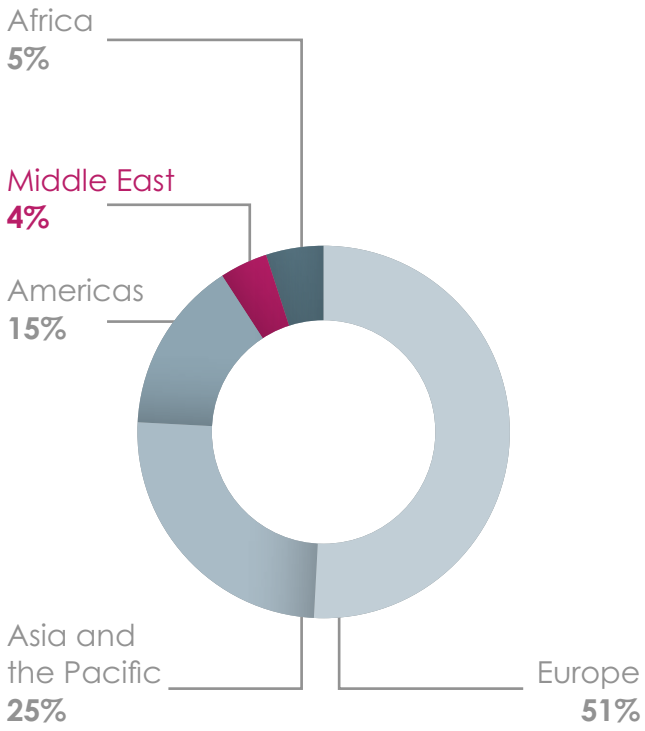
7.10 Source of demand: Middle East

For an in-depth market analysis of the Middle East, please refer to Annexures.

7.10.1 Overview of the Middle East as a source of demand

The Middle East only represented 4% of total global tourists in 2018. Gulf Corporation Council (GCC) nationals represent the bulk of all travel from the Middle East. Within the GCC, the largest market is Saudi Arabia – which also has the GCC largest population at 31.5 million inhabitants – followed surprisingly by Kuwait (4.5 million outbound tourists) and the UAE (3.3 million). The fastest emerging markets in the region are, however, Turkey and Iran, which already generated the highest number of outbound tourists in 2018 as shown in Figure 77.

Figure 77: The Middle East market share of global tourists, 2019



Source: UNWTO Tourism Highlights Report, 2019

7.10.2. Segmentation

Based on the methodology and limited data, Saudi Arabia, Kuwait, UAE, Turkey and Iran are the markets selected for further assessment as shown in Table 37 below.

Based on global outbound data (due to the limited inbound data for the Western Cape), each of the five selected markets shows great potential for future growth.

Table 37: Value and volume of top Middle East markets for the Western Cape

Market	Outbound value (US$bn)*	Volume to Western Cape**	Average spend per Trip (R) **	Value to Western Cape (Rm) ***	% Growth (2014 – 2018) ***
Saudi Arabia	US$16.3bn	No data	No data	No data	No data
Kuwait	US$14.3m	No data	No data	No data	No data
UAE	US$18bn	1 229	R19 300	R23m	19.6%
Turkey	US$4.6bn	7 291	R19 200	R89m	9.1%
Iran	Not data	No data	No data	No data	No data

*Source:: * UNWTO, 2018 **South African Tourism, 2019, *** Wesgro, 2020*

7.10.3 Accessibility to the Western Cape

Long-haul travel (with more multiple layovers) and cumbersome visa requirements all add to the time and financial investment in a trip. These issues will impact tourists' confidence to visit a destination. Table 38 below gives an overview of accessibility to the Western Cape for the selected Middle East markets.

Improved air access to the Middle East will assist the destination to grow its share of the selected market's tourists.

Table 38: Accessibility to the Western Cape

Market	Air access	Visa exemption period*	Visa fee applicable*	Confidence to travel
Saudi Arabia	Not direct	90 days	Yes	Medium
Kuwait	Not direct	90 days	Yes	Medium
UAE	Direct	90 days	Yes	Medium
Turkey	Direct	30 days	Yes	Medium
Iran	Not direct	90 days	Yes	Medium

**Department of Home Affairs (subject to change without notice)*

7.10.4 Attractiveness of the Western Cape

The markets selected have a range of choice available to them. For this reason, it is essential that the Western Cape's offering aligns with each market's main reason for travelling to ensure that the destination attracts, retains and rewards the tourists with memorable and shareable experiences. The Western Cape's attractiveness to the selected markets is shown in Table 39 below.

There is a strong alignment between what tourists from Saudi Arabia, Kuwait, UAE, Turkey and Iran want and what the Western Cape as a destination has to offer. The opportunity is focused marketing aimed at target consumer groups to get a high return on investment. The Western Cape's strong Halal cuisine, adventure and sheer variety of stunning natural beauty must be used as a drawcard in the marketing.

Table 39: Attractiveness of Western Cape

		Western Cape offering			
Market	**Main reason/s for travel**	**Culture and heritage**	**Food and wine**	**Nature-based**	**Adventure**
Saudi Arabia	Adventure, nature, Halal, explore new destinations, destress/relax, spend time with family, nature and weather, lots of activities to do	No	The Western Cape does have strong Halal offering in terms of food	Yes	Yes
Kuwait	Adventure, nature, Halal, explore new destinations, destress/relax, spend time with family, nature and weather, lots of activities to do	No	The Western Cape does have strong Halal offering in terms of food	Yes	Yes
UAE	Adventure, nature, Halal, explore new destinations, destress/relax, spend time with family, nature and weather, lots of activities to do	No	The Western Cape does have strong Halal offering in terms of food	Yes	Yes
Turkey	Adventure, nature, Halal, explore new destinations, destress/relax, spend time with family, nature and weather, lots of activities to do	No	The Western Cape does have strong Halal offering in terms of food	Yes	Yes
Iran	Adventure, nature, Halal, explore new destinations, destress/relax, spend time with family, nature and weather, lots of activities to do	No	The Western Cape does have strong Halal offering in terms of food	Yes	Yes

7.10.5 Barriers to travel to the Western Cape

Table 40 reviews five barriers to travel in the context of the Middle East markets and travelling to South Africa and the Western Cape.

Table 40: Barriers to travel

Market	Barriers				
	Language	Xenophobia	Safety and security concerns	Lack of knowledge of the Western Cape	High cost to travel to the Western Cape
Saudi Arabia	Yes	No	Yes	Yes	Yes
Kuwait	Yes	No	Yes	Yes	Yes
UAE	Yes	No	Yes	Yes	No
Turkey	Yes	No	Yes	Yes	No
Iran	Yes	No	Yes	Yes	Yes

The Western Cape is home to a vibrant Muslim community, making the province a warm and friendly host destination. However, safety and security is a significant concern. Safety is seen as the direct responsibility of the male. Men are predominately the sole decision makers in terms of planning and booking holidays (World Tourism Organisation and European Travel Commission, 2018) when married. They feel highly responsible and accountable for the protection of their families. A destination that is not seen as safe will not be high on the consideration list. However, tourists from the Middle East are quick to show resilience and are ready to resume travel plans to a destination once it is perceived as safe again.

There is a gap in the knowledge of potential tourists to the Western Cape as a holiday destination.

7.10.6 Trends and motivations for travel

By understanding the popular emerging trends as discussed in Section 3| forces and trends, impacting the Middle East markets will aid in shaping the product offering and messaging for selected markets as shown in Table 41.

Table 41: Trends and motivations

Market	Trends					
	My world in my hand	Personal and purposeful	Digital detox	JOMO	Multi-generational travel	Solo travel
Saudi Arabia	Lead motivator	Secondary motivator	Lead motivator	Lead motivator	Lead motivator	Lead motivator
Kuwait	Lead motivator	Secondary motivator	Lead motivator	Lead motivator	Lead motivator	Lead motivator
UAE	Lead motivator	Secondary motivator	Lead motivator	Lead motivator	Lead motivator	Lead motivator
Turkey	Lead motivator	Secondary motivator	Lead motivator	Lead motivator	Lead motivator	Lead motivator
Iran	Lead motivator	Secondary motivator	Lead motivator	Lead motivator	Lead motivator	Lead motivator

Budget is the primary decision maker for tourists from the Middle East, however, other trends and motivations do impact their decisions. The ability of a destination to be able to cater for all the family members (multi-generational trips), children in particular, is crucial in attracting these markets. Entertainment parks, farm parks, shopping, Halal-friendly restaurants and an abundance of sightseeing activities are big attractors. As part of the consideration for a multi-generational holiday, the cost of accommodation and the ability to meet the needs of the entire family is the first evaluation point for the Middle East traveller.

7.10.7 Recommendation to assist in taking advantage of the Middle East

The following recommendations are proposed:

1. All markets show favourable future growth opportunities, however, further analysis would need to be done. The tourism industry should find opportunities to 'hunt in a pack' to make a meaningful impact in these markets. Alignment with South African Tourism is key

2. Accessibility to the Western Cape is reasonable, but opportunities to improve direct air access should be reviewed

3. Marketing campaigns aimed at niche consumer segments promoting a wide range of Halal cuisine and family-friendly activities – all found in the breath-taking beautiful Western Cape - should be the key messaging. As language is a barrier, Arabic and English websites should be developed

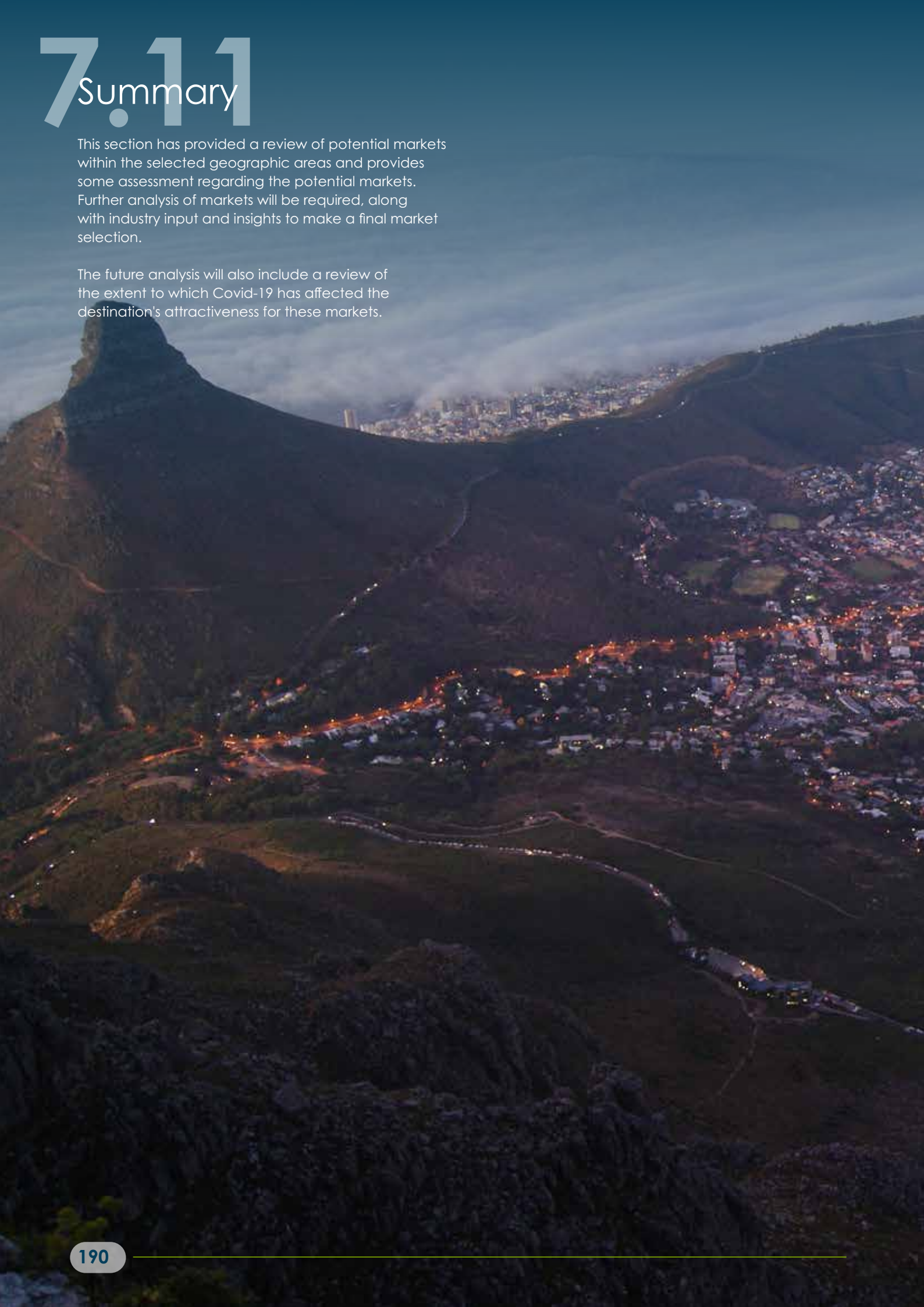
4. Safety and security is a major deterrent

5. As value for money is a primary point of evaluation, especially regarding accommodation for family, product mix and pricing should be developed to meet the needs of this market

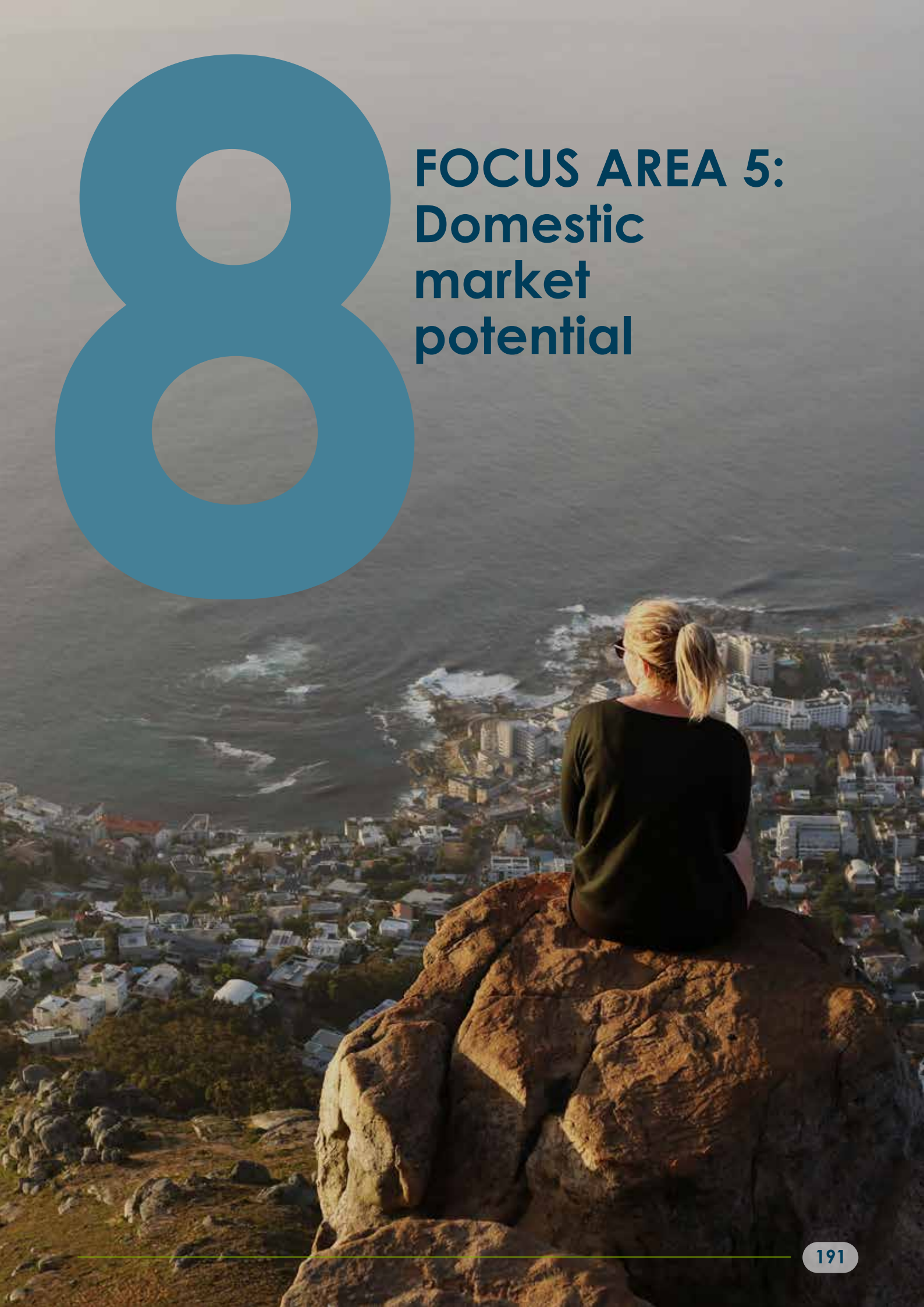
7.11 Summary

This section has provided a review of potential markets within the selected geographic areas and provides some assessment regarding the potential markets. Further analysis of markets will be required, along with industry input and insights to make a final market selection.

The future analysis will also include a review of the extent to which Covid-19 has affected the destination's attractiveness for these markets.



8 FOCUS AREA 5: Domestic market potential



8.1 Introduction

Another objective of Tourism Blueprint 2030 is to help develop a strategy that will ignite domestic tourism for the Western Cape.

According to the World Travel and Tourism Council (WTTC), more than seven out of every 10 dollars spent on tourism in a destination is spent by the domestic market. The money spent by the local market is, therefore, a more important source of tourism revenue than that of an international visitor.

However, in South Africa, we see a very different picture.

In 2019, total domestic tourist spend was R43.9 billion versus total international spend of R81.2 billion. Therefore, for every Rand spent by a local visitor, two Rands are spent by a foreign visitor. Due to this, especially in the Western Cape, there has been an historical trend to focus on international markets from a product development, pricing and marketing perspective.

Domestic tourism in many other countries is a critical driving force which has several benefits, including building resilience to global shocks. Tourism Blueprint 2030 aims to develop an actionable plan to help take advantage of domestic tourism for the Western Cape as an important source market for value, volume and geographic spread.

As with the international market potential, the national strategy will concentrate its efforts on a focused market, those travelling for leisure forms of tourism that will offer a high return on investment for the Western Cape.

For Tourism Blueprint 2030, domestic tourism can be defined as activities of a resident visitor within their country of residence and can be viewed as travel across districts (e.g. from the West Coast District to the Overberg District) or regionally (e.g. from the Western Cape to the Northern Cape).

8.2 The value of the domestic visitor

In 2019, South Africa's average trip duration was 3.3 bed nights, and domestic tourists took only 2.1 trips per year. Currently the leisure domestic average daily spend (excluding VFR) of R 727 is close to the spend of tourists from Asia, Africa and South America, as shown in Figure 78.

The opportunity for the Western Cape would be to provide a product mix and pricing model that helps increase domestic tourism. That said, it is also essential to take into consideration total disposable income per annum available to the domestic consumer.

Figure 78: International markets vs domestic (South Africa) markets value and trip duration.

Source: South African Tourism, 2020

8.3 The benefits of domestic tourism

Domestic tourism has various benefits, including (1) seasonality, (2) geographic spread, (3) igniter of development and investment and (4) as a shock absorber. They will be discussed in the following sub-sections.

Seasonality

Geographic spread

Igniter of development and investment

Shock absorber

8.3.1 Seasonality

As a long haul destination, the Western Cape's ability to attract international tourists outside their traditional holiday periods will always remain a challenge. The holiday periods build peaks and troughs in terms of pressure on infrastructure and sustainability of full-time work in the destination. As locals can take weekend breaks or short getaways, they can contribute to the sector's overall financial resilience and sustainability utilising the tourism capacity within a destination's off-peak periods.

8.3.2 Geographic spread

As domestic tourists have fewer time pressures on their itineraries in terms of what they need to see and do during a visit, they can travel to smaller rural towns which international tourists may never hear of or have the time to visit during their trip. This helps spread the benefit of tourism to local communities both from an economic perspective, but also from an awareness perspective via social media posts and word-of-mouth recommendations by visitors.

8.3.3 Igniter of development and investment

When domestic tourism starts to grow (i.e. increase in demand), there is a growth in confidence from government and business to invest in destination development and infrastructure. These types of investments, especially into infrastructure, provide tourism experiences that can be enjoyed by both the domestic and international markets. Growth in domestic tourism also spurs the growth of small businesses and encourages entrepreneurs to enter the market. Investment can range from improving road infrastructure to the upgrading of caravan and camp sites.

8.3.4 Shock absorber

If a destination has an active all-year-round domestic market, it will cushion the impact of global events that may prevent international tourists from travelling. An example thereof is the impact that the Covid-19 pandemic has on inbound arrivals. Many markets saw a decline in booking since the outbreak hit an inflection point in March 2020. Table 42 below shows the immediate impact the pandemic had on forward bookings to the Western Cape for the period April to September (2019 vs 2020).

Table 42: Forward Bookings (April – September 2020)

Country	Forward bookings Apr – Sep 2019	Forward bookings Apr – Sep 2020	% Change
USA	21 751	21 704	0%
UK	21 041	20 249	-5%
Germany	17 586	16 905	-4%
Netherlands	10 456	9 200	-12%
Australia	7 359	7 038	-4%
Italy	7 993	6 317	-21%
France	11 102	5 298	-52%
Belgium	3 713	3 995	8%
Brazil	3 344	3 758	12%
India	4 037	3 396	-16%
Canada	3 092	3 374	9%
Switzerland	3 186	2 876	-10%
Spain	2 825	2 774	-2%
Ireland	1 712	1 986	16%
New Zealand	1 421	1 524	7%
Others	23 161	18 095	-22%
TOTAL	**143 779**	**128 489**	**-11%**

Source: ForwardKeys, March 2020

8.4 Methodology

The same methodology used for the international markets to develop the market potential matrix was followed for the domestic market, with some adjustments to ensure a consistent approach. Five indicators were selected based on current volume, value, accessibility, attractiveness, barriers and trends.

1. **Segmentation**. The origin province, destination province and spend per trip was evaluated.

2. **Accessibility**. The assessment of factors such as air access and ground access into the Western Cape was undertaken.

3. **Attractiveness**. The attractiveness of the Western Cape's unique offering to these markets, and the ability of the traveller to stretch their funds far in the Western Cape, allowing them to achieve value for their holiday, was the third point of assessment.

4. **Barriers**. Barriers impacting their willingness to travel to the Western Cape was the fourth point. Barriers covered include budget constraints, lack of reason, safety and time constraints.

5. **Trends**. The final point of assessment was the alignment of the trends (Section 2) with the market selection. Popular emerging patterns (i.e. trends) will differ in presence and priority across the world.

8.5 Source of demand: South Africa

For an in-depth analysis please refer to the Annexure

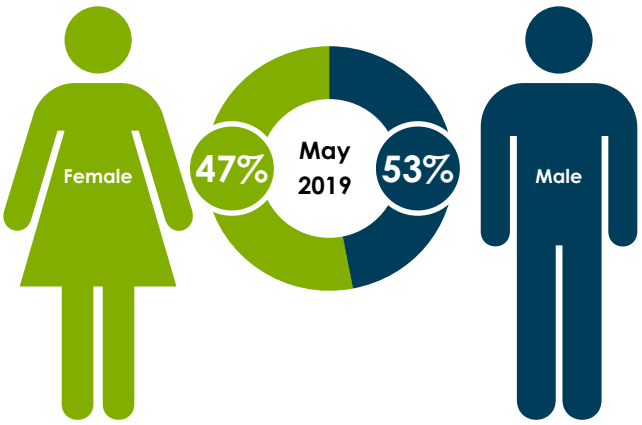
Taking into consideration the three approaches of tourism demand as discussed in Chapter 7.5. and reviewing it against the lifestyle assessment in Table 43 it is interesting to note the following:

- Safety remains a concern for the domestic market when travelling.
- The domestic market spends time researching and planning their holiday and prefers booking online.
- Destinations that offer a diversity of activities are highly desirable.
- The domestic market is open to taking multiple shorter holidays instead of one long holiday.
- Price (e.g. discounts) takes priority over convenience and drives conversion.

Table 43: Lifestyle assessment: Holiday travel-related preferences by lifestyle attributes

Question: When thinking about taking a holiday in South Africa, to what extent do you agree with the following statements:

Description	Mean Rating out of 5		
	Feb 2018 (n = 1 000)	Sep 2018 (n = 1 000)	May 2019 (n = 570)
I am always concerned about my safety during my travels.	4.3	4.4	4.6 ↑
I feel travelling is a great way to learn about different cultures.	4.3	4.3	4.5 ↑
I like to research the destination before I go on vacation.	4.2	4.2	4.5 ↑
I enjoy planning a vacation as much as the trip itself.	4.1	4.2	4.4 ↑
I plan my own trips over the internet rather than meeting with a travel agent.	4.0	3.9	4.2 ↑
I prefer travelling by myself or with just a small group of people.	3.7	3.9	4.1 ↑
I prefer to take multiple shorter vacations instead of one long vacation.	3.9	3.9	4.3 ↑
I prioritise price over convenience when planning my vacations.	3.7	3.8	4.1 ↑
When I find a vacation spot I like, I stick to that spot for future holiday trips.	3.8	3.8	3.9 ↑
I prefer exploring lesser-known destinations.	3.8	3.7	3.9 ↑
I (would) prefer international trips rather than travelling within my country.	3.5	3.5	3.9 ↑



↑ Signifies that the May 2019 score is higher than the Sep 2018 score

↓ Signifies that the May 2019 score is lower than the Sep 2018 score

Source: South African Tourism, 2019

8.6.1 Segmentation of the domestic tourism market

In 2019, 28.5 million trips were taken by South Africans. This is a 61.3% increase from the previous year. This equates to a net travel propensity of 49%. This means that 49% of South Africans have taken at least one trip in 2019. A breakdown of the province of origin, destination province and average trip spend for holiday can be found in Table 44 below.

Province of origin shows the volume of tourists from each province.

Destination province shows the volume of arrivals each domestic province received.

Average trip (R) holiday shows the average spend per trip. It must be noted that the average spend for VFR is R1 100 per trip and for business events it is R2 700 per trip.

Table 44: Segmentation for the domestic tourism

Market	Province of origin	Destination province	Average trip spend (R) holiday
Gauteng	8 434 927	6 674 593	R2 400
Kwazulu-Natal	4 152 182	6 198 264	R2 400
Western Cape	3 497 635	4 431 140	R2 400
Eastern Cape	2 903 800	2 096 776	R2 400
Mpumalanga	2 485 326	2 546 151	R2 400
North West	2 241 408	2 395 704	R2 400
Limpopo	2 212 685	4 170 850	R2 400
Free State	1 800 876	3 537 526	R2 400
Northern Cape	727 194	868 736	R2 400

Source: South African Tourism, 2019

In 2019, Gauteng was the most visited province in South Africa with 6.7 million arrivals; this was a 109% increase from 2018. The Western Cape was the third most visited province in 2018, with 4.4 million arrivals; this increased by 244%.

Gauteng was the most-visited province in 2019 with a total of 6.7 million trips. The Western Cape saw growth of 244% to reach 4.4 million.

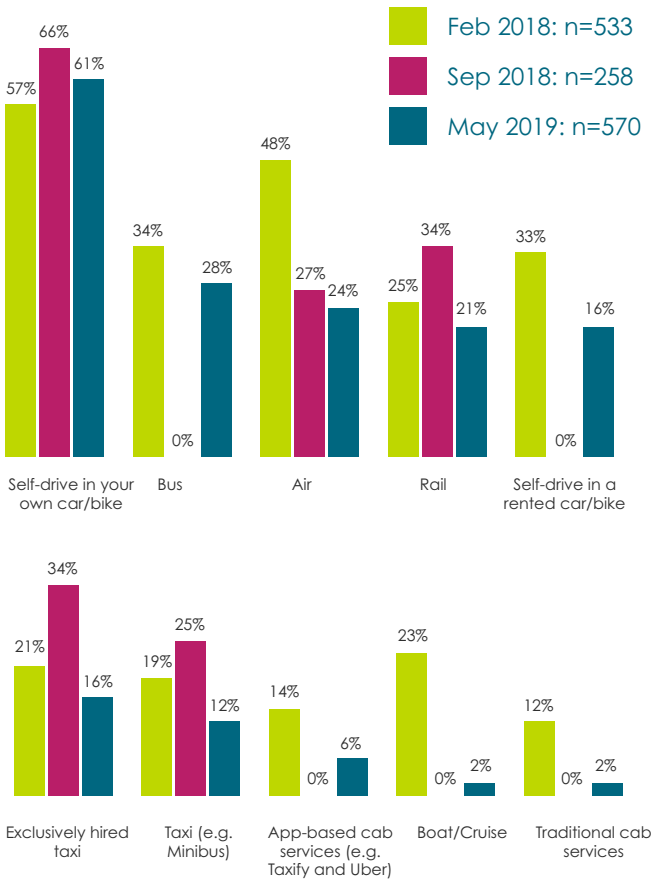
8.6.2 Accessibility of the Western Cape

To take advantage of weekend getaways and short breaks, affordable quick routes to the Western Cape are required, especially from Gauteng, the largest source province, and of course within the province itself to encourage locals to travel. Figure 79 reviews the domestic market's preferred mode of transport.

Figure 79: Preferred mode of transport

To each destination

Driving one's own car/bike (61%) is by far the most preferred mode of transport to reach one's destination when travelling within South Africa. Taking the bus increased significantly compared to the previous wave.



Source: South African Tourism, 2019

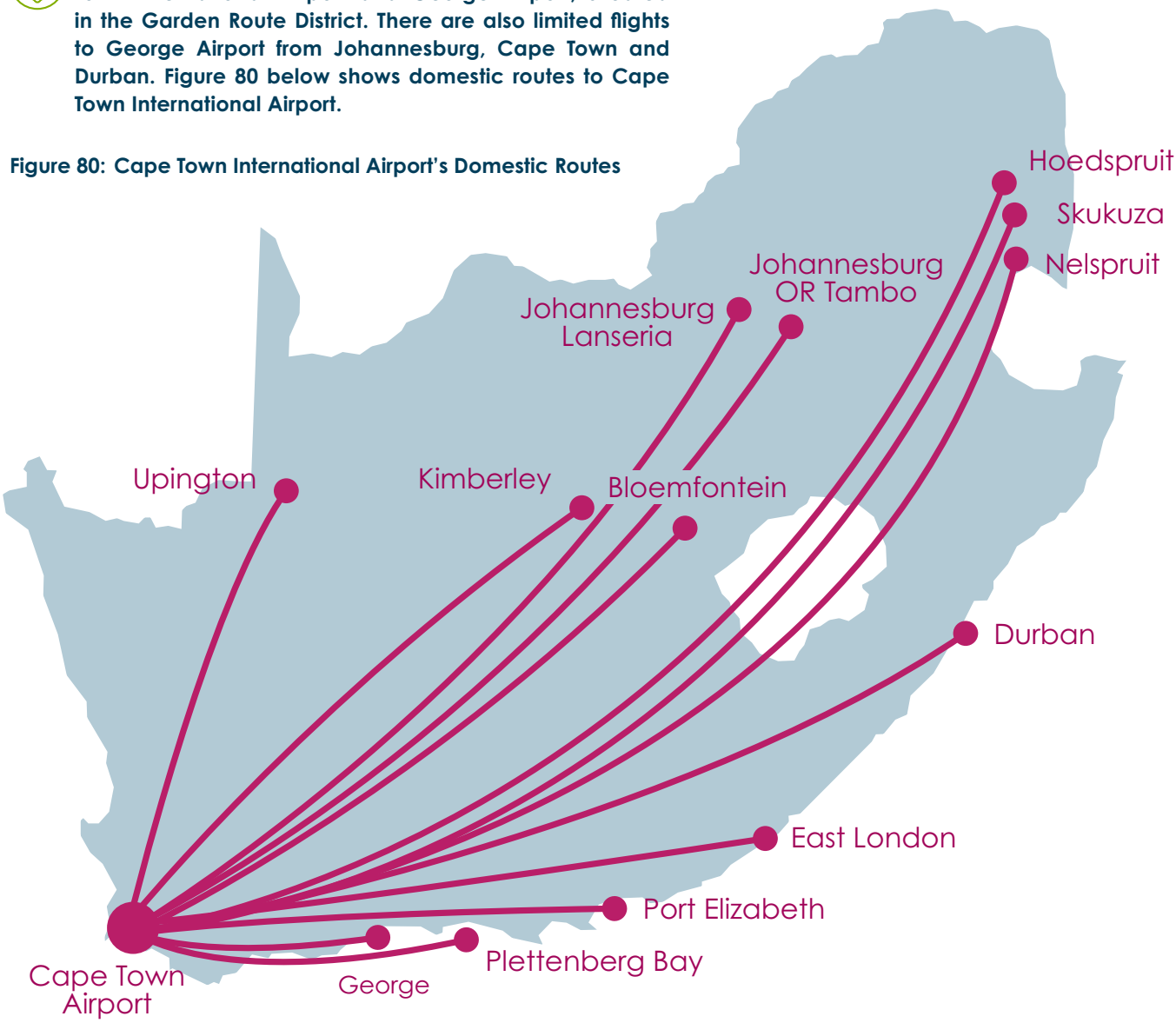
Based on this evidence, Table 45 reviews the main routes of access into the Western Cape (air, rail and road) and how the domestic market views the value offering of the destination.

Table 45: Accessibility to the Western Cape

Market	Air access	Rail access	Road access (self drive, bus)	Value for money (western cape)
South Africa	Limited	Limited	Good	Low to average

Domestic air travel costs are exceptionally high to Cape Town International Airport and George Airport, situated in the Garden Route District. There are also limited flights to George Airport from Johannesburg, Cape Town and Durban. Figure 80 below shows domestic routes to Cape Town International Airport.

Figure 80: Cape Town International Airport's Domestic Routes



Source: Cape Town International Airports, 2020

Rail could be seen as a possible solution, however, infrastructure and maintenance costs are high.

Road access to the Western Cape is good, though signage needs to be improved. The main access roads to the province are the N1, N2 and N7 with many secondary roads crisscrossing the region, making it ideal for safe road trips.

At present the perception of the Western Cape as a value offering to the domestic market is low to average.

It must be noted that the intention is not to move demand around the province, but grow demand overall for domestic tourism, which will have a positive impact on the Western Cape.

8.6.3 Attractiveness of the Western Cape

The Western Cape offers the domestic traveller something unique compared to the other provinces within South Africa in terms of forms of tourism and the attractiveness thereof. In Table 46 below, we see the main reasons why the domestic market travels and the alignment with the Western Cape's offering.

Although the Western Cape's offerings do align with South Africans' purpose for travel, the fact that it is only the third most-visited province out of nine means that the product mix and pricing do not resonate enough with the domestic market.

Table 46: Forms of tourism

Market	Main reason/s for travel*		Western Cape forms of tourism			
			Cultural tourism	Food and wine	Eco-tourism	Adventure
South Africa	Social Gastronomy Shopping Beach Culture Wildlife	Adventure Nightlife Medical Visiting natural attractions	Yes	Yes	Yes	Yes

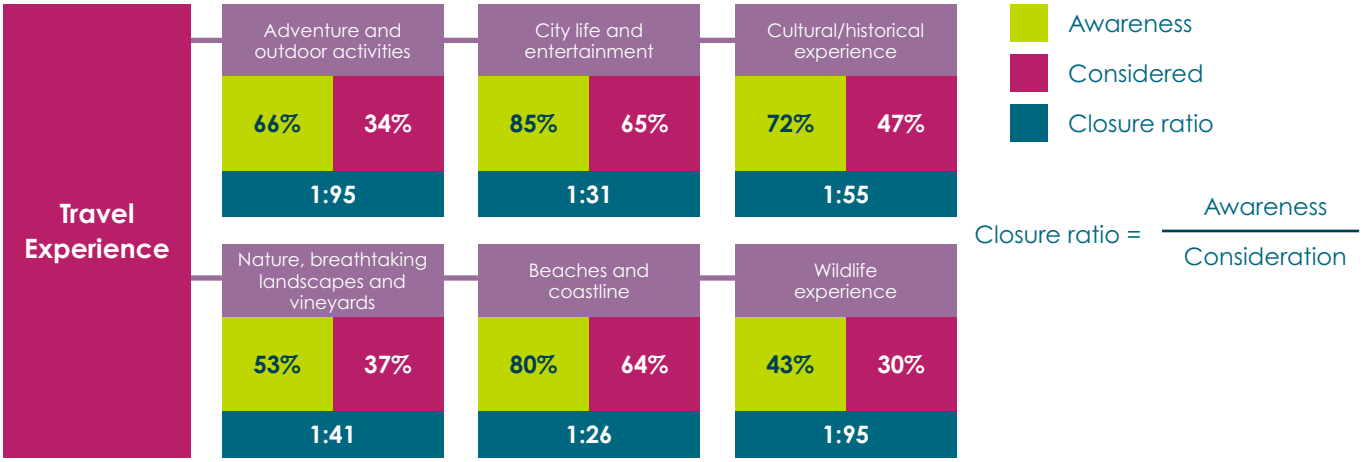
**Source: South African Tourism, 2020*

#Refer to Table 4 for Forms of Tourism definitions.

When further researching travel preferences regarding awareness and consideration, as shown in Figure 81 below, it shows that beaches and coastlines, as well as wildlife experience, have the highest closure ratio of 1:26, while adventure and outdoor activities has the lowest at 1:95.

This further substantiates the evidence that the Western Cape most definitely has the right offering of beaches and coastlines, and should leverage this when marketing to the domestic market.

Figure 81: Travel preferences



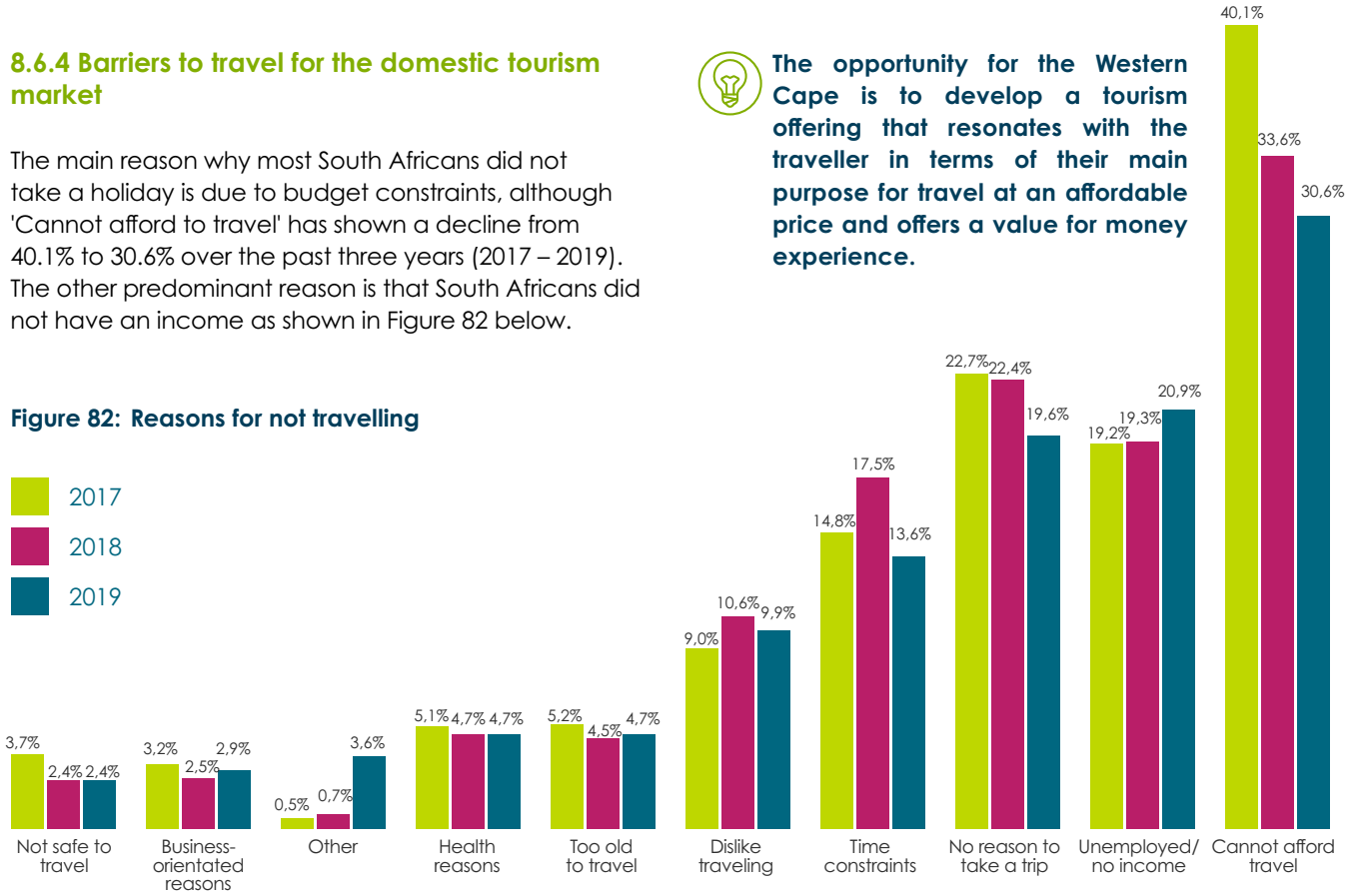
Source: South African Tourism, 2019

8.6.4 Barriers to travel for the domestic tourism market

The main reason why most South Africans did not take a holiday is due to budget constraints, although 'Cannot afford to travel' has shown a decline from 40.1% to 30.6% over the past three years (2017 – 2019). The other predominant reason is that South Africans did not have an income as shown in Figure 82 below.

The opportunity for the Western Cape is to develop a tourism offering that resonates with the traveller in terms of their main purpose for travel at an affordable price and offers a value for money experience.

Figure 82: Reasons for not travelling



Source: South African Tourism, 2019

8.6.5 Trends and motivations for travel of the domestic tourism market

Understanding the popular emerging trends as discussed in Section 3 | forces and trends impacting the South African market, will aid in shaping the product offering and messaging for this specific market. Table 47 below indicates which trends are lead or secondary motivators of travel for the domestic market.

The ability to plan, book and share travel experience via a mobile phone through a seamless and effective system is a lead motivator for South Africans' wanting to travel. Multi-generational travel is also on the rise, and the opportunity to provide South Africans with accommodation and experiential offers that cater for their various generations, at an affordable price, is key.

Table 47: Trends and motivations of travel for the domestic market

Market	Trends					
	My world in my hand	Personal and purposeful	Digital detox	JOMO	Multi-generational travel	Solo travel
South Africa	Lead motivator	Secondary motivator	Lead motivator	Lead motivator	Lead motivator	Not relevant

8.6 Recommendation for the domestic market

Work on not only increasing **the number of visitors** to the Western Cape, but on the number of trips taken per year. The Western Cape has the opportunity to help grow the domestic tourism holiday pie for South Africa.

Focus on the **two economic hubs**, Gauteng and Western Cape, as the starting point in terms of marketing and promotion.

Work with the industry to develop a **product mix and pricing model** that makes the Western Cape affordable and helps sell unsold inventory, especially in the low season and rural areas e.g. variable pricing platform.

Look at implementing infrastructure and investment projects in the pipeline that focus on improving accessibility e.g. rail development and increased flights to George Airport.

9 FOCUS AREA 6: Legislative and partnership

9.1 Introduction

This section addresses a critical component of Tourism Blueprint 2030, the assessment and review of the regulatory environment and institutional relationships in the tourism ecosystem.

9.2 Methodology

To assess the effectiveness and strengthen relationships within the tourism ecosystem, an assessment was done to inform a possible alternative tourism partnering model within the Western Cape. This partnership approach will function within a particular regulatory environment and will be formalised through legislation.

The methodology used for this assessment and review takes both aspects into account. The following approach was used during this phase of the research process:

1. Conducting desktop review of relevant legislation and strategies to provide context to stakeholder engagements and the ultimate recommendations

2. Assessing the current institutional relationships, by gathering information from stakeholders. This was done during three workshops in three sample districts (the Cape Town Metropolitan Municipality, the West Coast District and the Overberg District), as well as a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis of the current local tourism organisation (LTO) model

3. Developing of recommendations for system improvement

4. Developing the partnership model concerning the institutional arrangements for tourism within the Western Cape

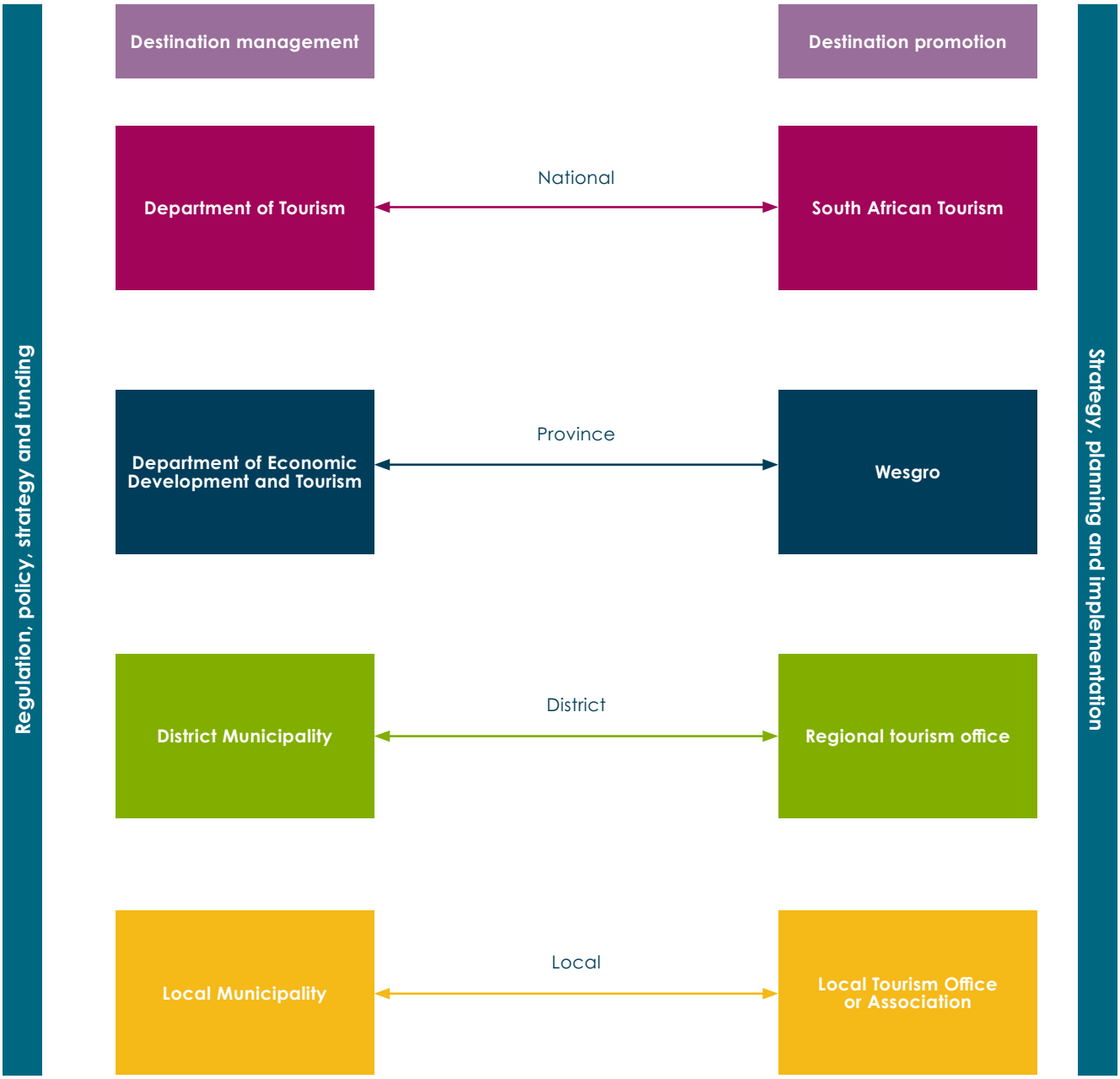
This section of the report provides a new approach to the Western Cape tourism partnering framework and approach (a partnering model) as well as recommendations for a set of steps to achieve a more desired 'to-be' scenario.

9.3 Current partnering model and roles and responsibilities

The current relationship between various levels of government is shown in Figure 83 below. However, there is a lack of clarity regarding this model and specific roles and responsibilities within the tourism ecosystem.

With better understanding of this existing model, improved coordination of tourism activities between spheres of government and better integration of tourism activities into other related functions and institutions, such as spatial town planning and economic development, can occur.

Figure 83: The Western Cape tourism partnership model



A list of all regional and local tourism offices can be found in the Annexures.

9.3.1 Roles of institutional bodies

The role of institutional bodies is covered in Table 48 below.

Table 48: Role of institutional bodies

Institutional body	Role
Department of Tourism	Provide national directive (including tourism norms and standards) and enabling legislation to facilitate growth in the tourism sector.
South African Tourism	Develop and formalise a unified and shared country tourism brand with input from all stakeholders, and actively market and promote this brand on international platforms.
Department of Economic Development and Tourism	Interpret national directive into provincial planning and strategy, and support district municipalities in developing regional tourism strategies.
Wesgro	Develop a Western Cape marketing narrative (not a formal brand, but rather a way of communicating the appeal of the area) that is aligned to the national brand, and market and promote the Western Cape tourism products and experiences on international platforms.
District municipalities	Foster regional tourism collaboration, and coordinate local development activities around a single narrative for the region.
Regional tourism offices	Develop a shared regional tourism marketing narrative (as with the Western Cape) and coordinate the region's LTO activities around this marketing narrative.
Local municipalities	Coordinate local tourism development within the municipality's planning function, and oversee and direct LTO planning and activities.
Local tourism offices or associations	Coordinate local stakeholders, foster collaboration between the private sector, public sector and communities, and develop and implement destination marketing and promotion strategy in line with the regional brand.

9.3.2 Relationships between institutional bodies

The relationship between each institutional body is covered below in Table 49.

Table 49: Relationship between institutional bodies

Institutional body 1	Institutional body 2	Relationship
Department of Tourism (DOT)	South African Tourism (SAT)	DOT funds the operations of SAT. A close working relationship between these bodies results in a coordinated and collaborative national brand and approach to tourism.
Department of Tourism	Department of Economic Development and Tourism (DEDAT)	DOT provides support to DEDAT in implementing national legislation and strategy. The approach of DOT enables provinces to create a unique provincial plan that aligns to the national brand and strategy.
South African Tourism	Wesgro	SAT supports Wesgro in translating the national brand into a marketing narrative for the Western Cape. SAT markets South Africa as a destination, giving equal exposure to all provinces.
Department of Economic Development and Tourism	Wesgro	DEDAT develops a coordinated and collaborative approach to tourism in the Western Cape, aligning destination planning goals and destination marketing and promotion strategies. DEDAT funds Wesgro. The two organisations work closely together to develop the provincial strategy for tourism, which includes both destination planning and development, as well as destination marketing and promotion priorities.
Department of Economic Development and Tourism	District municipalities	DEDAT works to support district municipalities in developing a regional approach to tourism development and assists districts with interpreting relevant legislation.
Wesgro	Regional tourism offices (RTOs)	Wesgro works closely with RTOs to develop a collaborative regional marketing narrative within the broader Western Cape identity and provides RTOs with access to international marketing events.

Institutional body 1	Institutional body 2	Relationship
Intergovernmental forum	Provincial departments and municipalities	The intergovernmental forum works at the district level and enjoys representation from relevant provincial departments and municipalities. Here, officials work together to address issues related to tourism that cut across mandates, i.e. safety, mobility and access, heritage sites, etc. This forum is a direct result of the WC joint district approach (JDA).
District municipality	Regional tourism office	The district municipality and RTO work closely to develop a clear tourism strategy for the region, that encompasses both tourism development and tourism marketing activities. The district municipality adequately funds the operations of the RTO, and the division of roles between the two institutions is clearly defined. There is a collaborative governance structure in place to ensure mutual accountability.
District municipality	Local municipality	The district municipality supports local municipalities to translate the regional tourism strategy into local planning and activities. The local municipalities elevate issues, barriers and blockages to the district municipality to address with DEDAT.
Regional tourism office	Local tourism office (LTO) or association	The RTO and LTOs work together to ensure LTO activities are coordinated towards a single marketing narrative for the region. The LTOs provide products and other marketing materials for the RTO to market at national and international tourism events.
Local municipality	Local tourism office	The local municipality and LTO work closely together to deliver tourism development and marketing activities that create a better visitor experience. The LTO feeds private sector and community information, issues, and concerns into the municipality, to inform the municipality's planning. The relationship means that the LTO has direct contact with the municipality to support private sector investment in the local tourism sector and works to foster a sense of community pride and ownership, which leads to the improved visitor experience.

9.4 Critical legislative and regulatory issues identified

The legislative framework provides an array of mandates and directives for institutions and organisations. The strength of these relationships that constitute the Western Cape tourism ecosystem was investigated through three workshops to better understand the effectiveness of the framework.

The workshop participants focused on:

1. Input into the effectiveness of the legislative framework
2. Discussion regarding the strength of relationships within the tourism ecosystem in their districts
3. Providing commentary on which legislation works well, what is challenging and making suggestions for improvements

The insights gained from these three workshops summarised in Table 50 below helped shape the recommendations for the system improvement.

9.4.1 Critical issues identified by workshop participants

The views expressed in Table 50 below are those of the participants and not the Department of Economic Development and Tourism per se, but are critical as evidence of input into the research process.

Table 50: Workshop legislative overview

Legislation	Workshop feedback	Gap
White Paper on Tourism Development and Promotion (1996)	1. There is a lack of a clear vision for South Africa in the White Paper on Tourism Development and Promotion. 2. The White Paper also does not unpack the role of tourism in a developmental state. 3. The paper lacks clarity and needs to be updated to suit the current context.	
The Western Cape Investment and Trade Promotion Agency Law (1996)	1. The Western Cape Investment and Trade Promotion Agency Law does not clearly define the role of Wesgro and the extent to which it is mandated to support municipalities. 2. There is a lack of consistency in the application of the Western Cape Investment and Trade Promotion Agency Law. 3. There is a general lack of clarity on the respective roles of municipalities, provincial government and Wesgro.	
The National Tourism Act		This Act should mandate the grading of all establishments to create fairness in the industry.
Structural and role issues	1. There is a lack of clarity regarding a standard LTO structure and no precise legislative framing for funding LTOs. 2. The local mandate for tourism is unclear, and the roles are confusing.	
General legislative issues	1. In general, legislation is seen as being too prescriptive and therefore hampering growth. 2. The legislation does not allow for tourism to integrate with other developmental activities (education, planning, etc.) 3. The legislation contributes to the challenges for the domestic. visitor market when competing with the foreign visitor market, such as high transport, access and attraction costs.	

Legislation	Workshop feedback	Gap
Consequences of legislative issues	1. There is not enough focus on place-making and the building of pride in local identity 2. Transformation in tourism at a local level has not happened There is a need for deliberate intervention by the state to ensure compliance with transformation targets within the sector	

9.5 Tourism legislation and strategy at a municipal level

Table 51 below summarises the institutional state of tourism in each of the six districts of the Western Cape, by outlining whether municipalities have tourism bylaws and strategies in place.

Table 51: Institutional state of tourism per district

Municipality	Tourism strategy	Tourism by-law
City of Cape Town	x	x
Cape Winelands District Municipality	x	-
Breede Valley	x	undetermined
Drakenstein	x	undetermined
Langeberg	x	undetermined
Stellenbosch	x	undetermined
Witzenberg	x	undetermined
Central Karoo District Municipality	x	-
Beaufort West	-	-
Laingsburg	-	-
Prince Albert	undetermined	undetermined
Garden Route District Municipality	x	-
Bitou	x	x
George	x	undetermined
Hessequa	x	undetermined
Kannaland	x	undetermined
Knysna	undetermined	undetermined
Mosselbay	x	undetermined
Oudtshoorn	x	-
Overberg District Municipality	x	-
Cape Agulhas	x	undetermined
Overstrand	undetermined	undetermined
Swellendam	undetermined	undetermined
Theewaterskloof	undetermined	undetermined
West Coast District Municipality	x	-
Bergriver	x	undetermined
Cederberg	-	undetermined
Matzikama	x	x
Saldana Bay	x	x
Swartland	x	undetermined

Note: Where data for a particular municipality could not be sourced in time for the finalisation of this document, the entry is listed as 'undetermined'.

9.6 SWOT analysis of local tourism offices and associations

In addition to the legislative analysis in section 9.5, a SWOT analysis was conducted to gain insight into the strengths and weaknesses of the institutional relationships within the tourism sector itself. The data gathered is summarised below.

SWOT

S

STRENGTHS

1. Fostering collaboration

- Regular meetings enable information sharing and coordination.
- At the RTO level, management can ensure regional coordination and 'can-do' attitude at the local level.

2. Building local businesses

- A well-functioning LTO enables the private sector to drive marketing.
- LTO can provide referrals to local business and help businesses learn from one another.
- More significant corporate fee-paying members are happy to support accountable LTOs who demonstrate effectiveness in the local area.

3. Effectiveness

- The LTO is an accessible, personal point of contact with the community and tourists, enabling people to walk in or call at any time.
- The LTO provides solutions to walk-in customers, to ensure local businesses benefit from tourism spend despite apparent barriers.
- LTO officials can administer pleasant, discerning, personal help to walk-ins, callers and those reaching out via social media. This personal connection results in increased trust and a higher likelihood of converting the engagement to a sale.
- The LTO provides a one-stop-shop service, including acting as a central point to collect information/tickets (such as Webtickets in Hermanus).
- LTOs can be flexible enough to provide services beyond a classic tourism mandate, such as submitting road signage applications to province, helping design and print CVs, etc.
- LTOs can also offer the flexibility of requiring shorter (less rigorous) working hours outside of season.

4. Data

- Officials maintain primary research on visitor statistics, which helps with development, marketing and event planning.

W

WEAKNESSES

1. Structural issues

- Participation in the LTO committee is voluntary, requiring a broad coalition of the willing for success. This scope means that relatively few individuals, if opposed to a proposal, can halt progress and discourage champions. This blockage either causes churn in committees, resulting in loss of institutional memory and learnings, or unchanging committees that are less innovative.
- The membership nature of the committee tends to divert focus to member needs, and not to those of the broader area.
- Personnel capacity and skills required for varied role requirements for visitor interaction are hard to find, and often poorly paid.
- There are negative perceptions of LTOs.
- The LTO committee can be vulnerable to accusations of favouritism.
- Regional centres (e.g., Hermanus in Overstrand) can be accused of seizing the limelight, and of subjective decision making.
- The low perception of value for membership fees means that only larger companies pay fees to support the LTO and industry.
- The effectiveness of LTOs is questioned.
- The number of walk-ins to visitor centres is decreasing. This decrease in walk-ins means that their research function is less accurate, and they gain less income via commission on referrals.
- The LTO model does not have a sufficient impact. For example, in the Garden Route, there are seven local municipalities within the district, all providing funding for their LTOs. These are either independent, non-profit organisations, or departments within the municipality. Those with external LTOs use a range of organisational and funding models with some LTOs funded exclusively with public funds, and others supplementing their grant funding with membership fees and corporate sponsorship.

2. Absence of strategic clarity

- There is no clear link regarding brand messaging between national (SA) tourism, provincial tourism, regional tourism and local tourism. This fragmentation of messaging is exacerbated by each town, believing that they alone can effectively market their offering.
- Each LTO office has the mandate to market only its specific town.
- Some of the LTOs are of the view that tourism development is not part of their function and see their role as only tourism marketing.

3. Funding issues

- The amount budgeted for the tourism function does not increase with inflation to reflect real costs.
- The economic downturn has resulted in fewer paying members, which in turn reduces the LTO marketing budget, and that can translate to lower visitor numbers.
- Efficiencies caused by budget tightening lead to reduced opportunities.
- The lack of multi-year funding, i.e. LTOs having to motivate for budget each year, inhibits their ability to plan effectively.

4. Regional tourism office (RTO) issues

- The RTO has limited authority to ensure cross-sector coordination and accountability (between the private and public sectors).
- The RTO has a limited budget, which limits its ability to market internationally.
- The public sector RTO is bound by public sector supply-chain procedures which prevent direct negotiation with global operators, international brands, and investment promotion units.
- The RTO has limited ability to recruit and retain required human capital due to complex public HR practices, a lack of funding, or inadequate funding.

OPPORTUNITIES

1. Embedding improved LTO principles

- Making allowance for technological advancement and the opportunities it allows.
- Keeping what works, such as being flexible to income opportunities and providing personal services to fuel the local economy.
- Aligning outside sources of income to support the business model of the LTO.
- LTOs should serve as an economic bridge between the haves and the have-nots.
- LTOs should develop specific regional tourism objectives and aligned policies.
- LTOs should facilitate the development of local high-value-adding businesses.
- LTOs should strategically market the region domestically and internationally.
- The LTO should create and promote a regional image in line with the development strategy.

2. Increased collaboration

- A coordinated model should be developed, with funding guidelines for how to apply for funding and how to access further funding.
- The LTO can plan, coordinate and align events to promote the destination as a tourist spot.
- A coherent coordination strategy will ensure no duplication of effort. Templates of maps and promotional material will allow a similar look and feel.
- Coordination of collateral should encourage economies of scale for printing, website templates, etc.

3. The opportunity exists for a new model

- The widely recognised need for a new model has created the opportunity to implement one.
- This new approach will allow for a top-down model; to date, experienced officials at the local and regional levels have been trying to experiment in this area without success and are keen for change. (e.g. Kiewiet van Rooyen of the Swartland Municipality has implemented three models over the last decade).

4. Process improvement opportunities

- Municipalities need better guidelines on how to fund tourism, to help them benefit from it.
- There is the opportunity to tighten up processes for efficiency, i.e. standardising internal LTO processes to improve output.
- The LTO could initiate innovative supply chain processes that ease doing business directly and/ or indirectly with relevant suppliers.

5. Improved focus on brand

- An improved LTO model would allow more focus on marketing and branding.
- It will enable the creation of a single vision and brand with other stakeholders.
- The LTO can focus on branding and promoting the location and its events.

6. Creation of new opportunities

- Empowered LTOs can provide information to help investors realise local opportunities.
- The LTO could function as an investment hub.
- A new LTO model could enable LTOs to work in diverse communities, not just to focus on the formal economy but also growing the informal economy.

7. Data improvements

- The LTO could regularly collect and distribute a dashboard of economic and social indicators.
- The LTO could conduct research and facilitate collaboration.
- The LTO could contribute to visitor experience research, design and performance management.
- Identify target markets through robust research and analysis.

T

THREATS

1. Process risks

- LTOs who form within the municipalities are bound by supply-chain procedures which could add red tape to the timeous delivery of activities.

2. Funding risks

- LTOs do not have sufficient budget or reach to market the destination on global channels.
- Financial constraints are significant, including the quantum of funding and the lack of multi-year funding.
- There are continual staff training costs to maintain understanding and utilisation of technological advancement.

3. Lack of collaboration

- The disjuncture between local municipalities and their tourism offices.
- Inter-destination competition between towns/tourism brands.

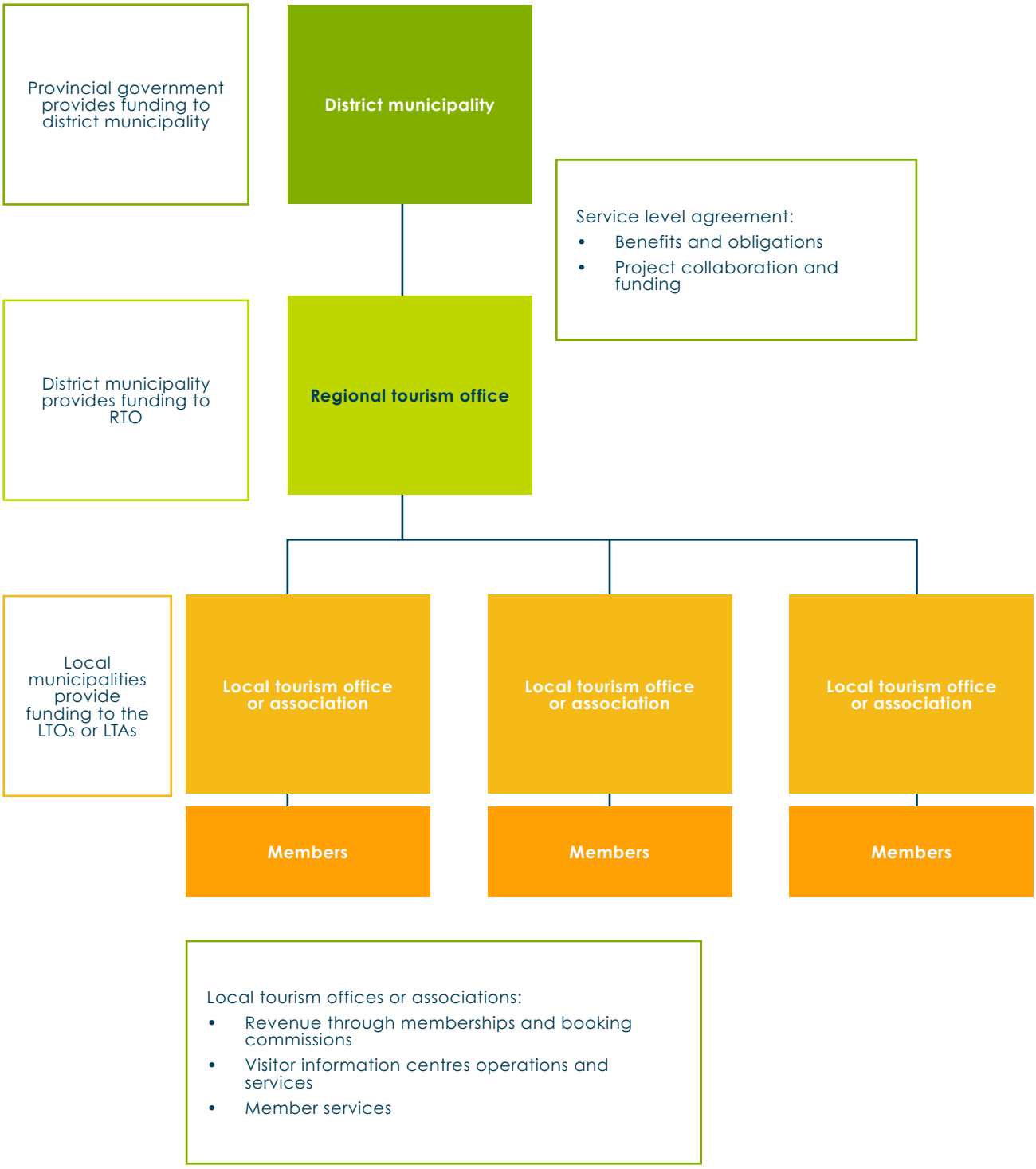
4. Risks associated with the LTO role

- There is the perception that the number of walk-ins at LTOs is decreasing, owing to online activity.
- This decline in walk-ins means that bookings through LTOs and their visitor information centres are lower, as are their commissions for placing these bookings, and allows the relevance of visitor information centres and by association, LTOs, to be questioned.
- LTO functions located within municipalities are seen to lead to significantly reduced referrals.
- Changing the LTO model will mean that managers (currently holding the LTO eco-system together) may be lost.
- Unsatisfactory outcomes of the current model.
- Mixed messaging to tourists.
- There is no alignment of the processes.
- Inconsistent quality and standards.
- Brand dilution.
- Lack of accountability and blame-shifting.

9.7 Key issues with current institutional arrangements

The current institutional arrangement is shown in Figure 84.

Figure 84: Current institutional arrangement



The challenges with this existing institutional arrangement include the following as shown in Table 52:

Table 52: Challenges with existing institutional arrangements

Arrangement	Challenge	Opportunity
LTO Model	1. There is no mechanism for sustained funding and the role definition is not clear and standardised. 2. There is no sustained, inflation-linked funding to enable these activities. 3. The LTO does not always promote collaboration between the public sector, private sector and communities. 4. There is a lack of linkages into the municipality (strategy, planning, shared vision).	It should convey what is included (marketing, visitor services, promotion, and local tourism-related business support), and what is excluded.
Relationship between tourism and the broader ecosystem	1. There is a lack of tourism benefit to communities. 2. There is also a separation between the visitor experience and the local experience. 3. There is no shared narrative about 'the place'.	
Relationship between tourism and the municipality	1. There is a lack of standardisation regarding where tourism sits within a municipality. 2. There is a lack of understanding of the value of tourism by politicians. 3. There is no integration and alignment of tourism and tourism development activities. 4. There is a lack of integration of tourism into municipalities' strategic plans (LED, IDP, SDF).	

9.8 New partnership approach

The current institutional arrangement has been outlined in section 9.7 and the new partnership approach is set out below.

9.8.1 Strategic focus

1. Tourism Blueprint 2030 offers a tourism partnership approach model, and there is agreement on the outsourced services.
2. There is a shared vision and understanding of the Western Cape identity across the region, with local destination identities highlighted and marketed.
3. There is an understanding of the value of tourism by politicians and officials, which ensures their support for tourism development.
4. There is alignment of tourism to the district and local IDP and strategic policies and strategies across different spheres of government.

9.8.2 Structure

1. The local municipality has a mechanism to appoint and fund an LTO.
2. The local municipality outsources marketing, promotion and visitor services to the LTO.
3. There is sufficient funding to the LTO, and it keeps up with inflation which enables competitive marketing of the destination.
4. There is clarity around the roles and functions of LTO or Destination Marketing Organisation (DMO).
5. The LTO can be innovative and adapt according to changing circumstances.
6. There are no duplications between the LTO and the municipality and no duplication of developmental functions.

9.8.3 Improved collaboration

1. LTO staff and municipal officials have a good, collaborative relationship and share information and shared goals.
2. There are good relationships between officials, LTOs, industry and communities.
3. There are good, collaborative relationships between destinations within the region.

9.8.4 Tourism delivery

1. There is continuity of service offering, destination branding, marketing campaigns, visitor information services.
2. There is a reliable payment mechanism.
3. There is local knowledge of the destination because of the regular contact between the LTO, the communities and the private sector.
4. There is sufficient marketing focus on the domestic market to support local areas within the region.
5. There is a platform for local tourism businesses and communities to engage in tourism issues.
6. The Western Cape and its various local areas have a presence at relevant trade shows, e.g. World Travel Market.
7. The tourism performance of the destination is monitored, as well as that of the LTO. There is reliable data to enable monitoring.
8. Tourism initiatives in local communities are supported.
9. SMME tourism businesses are supported.

Case Study: Tourism legislation in KwaZulu-Natal and Gauteng provinces

The KwaZulu-Natal Tourism Act, 1996, and KwaZulu-Natal Tourism Authority Amendment Act, 2002 provide for the establishment of bodies to develop, promote and market tourism in KwaZulu-Natal (KZN) within the framework of government policy, and to provide for matters incidental thereto. These enabled the KZN Tourism Authority in the promotion, development or marketing of tourism for KZN.

The legislation stipulates that the KZN Tourism Authority must establish a forum with municipalities in KZN to facilitate cooperation and eliminate duplication of functions and activities. It also specifies the tourism functions of a municipality as being responsible for local tourism within its area of jurisdiction. Municipal tourism functions include, but are not limited to, the following core areas:

- monitoring local tourism operators and establishments for compliance with provincial policies and legislation;
- promotion, marketing and development of local tourism within the metropolitan or district municipal area;
- alignment of local tourism marketing initiatives with provincial tourism marketing strategies;
- facilitation of the participation of local communities in the tourism industry;
- securing equitable distribution of local tourism resources within the area of the metropolitan, local or district municipality;
- adopting measures and programmes to transform the local tourism industry, including granting preferences to women and small, medium and micro-enterprises;
- implementing provincial tourism policy in conjunction with the Authority; and
- any other functions specified in national or provincial policies or legislation.

The Gauteng Tourism Act no. 10 of 2001 and Gauteng Tourism Amendment Act no. 3 of 2006, is the main piece of legislation guiding tourism in Gauteng. The Act enabled the establishment of the Gauteng Tourism Authority, outlining its activities and defining its powers and functions in accordance with national policy and legislation. Other aims of the Act are to provide for the promotion and sustainable development of tourism in Gauteng and for the registration of tourist guides, tour operators, couriers, accredited training providers in the tourism industry, hotels, conference centres, restaurants, designated tourist amenities and other accommodation establishments.

In the cases of both KwaZulu-Natal and Gauteng, the legislation does not specify the institutional structure to be implemented on a municipal level.

9.9 Recommendations

Recommendation 1:
Place collaboration at the core of Tourism Blueprint 2030.

This report presents a proposal for a Western Cape tourism sector partnering framework and approach (partnering model). The model is based on a number of key principles:

1. The recognition that South Africa is a developmental state, and the priority is to create and enable jobs and economic growth and social development to enable wellbeing and livelihoods for the citizens of this country.

2. The development of tourism in South Africa is dependent on effective collaboration between all spheres of government in developing and managing tourism, as well as cooperation between government, communities and the private sector.

3. As stated in the White Paper on Tourism, tourism should be led by the government, driven by the private sector and based within communities.

4. The benefit of tourism, which has the potential to drive development and job creation, should be shared by residents and visitors alike.

The following points should be considered when adopting a partnering approach.

1. A regional development partnership works best when it can focus on issues of local importance that have potential regional significance, and on regional issues that have a potential local impact.

2. An effective partnership is based on a clear understanding of the differentiated roles of the partners – to deliver on their mandates, in a collaborative manner. A backbone structure (LTO and RTO) can help partners understand the value of partnering, identify a common agenda, facilitate joint action, share knowledge, and build partnering capacity. In other words, a backbone structure is not a local project delivery vehicle, but rather, a platform designed to help partners deliver their projects in a way that results in regional collective impact. Therefore, conceptualising a partnering backbone structure like an LTO or RTO as a 'service provider', regulated through 'service level agreements' is inaccurate. It is more helpful to see the LTO as the vehicle through which an inter-municipal and a public-private partnership agreement gets implemented.

3. An effective tourism growth strategy includes both risk mitigation (understanding how to improve system performance) and reputation enhancement (understanding what the region is known for). Both these processes require capabilities to manage the things that one controls directly and influence those things (institutional mandates, processes, decisions, budgets, plans, strategies, priorities, etc.) that are part of the same system, but which are beyond direct control.

4. It is helpful to distinguish the institution (the municipality, with its specific powers, functions, roles and responsibilities) and the destination (the territory as a whole, including the inhabitants, the assets, private sector and community investments, institutions, etc.). A 'systems and partnering approach' starts with seeing the territory as a whole, with all its components, and not just as a collection of institutional mandates.

5. A regional partnering approach includes a whole-of-government approach and a whole-of-society approach. It also includes getting the relationship right between 'bottom-up' and 'top-down' initiatives, both between local municipalities and the district municipality and between the public sector 'authorising environment' and the non-government 'mobilising environment'.

6. A common misconception is that a partnering approach is only about 'dialogue' or better 'coordination' processes. The rationale for a partnering approach is to enhance implementation by specifically addressing two questions that are often ignored in planning processes, to the detriment of implementation: 1)who needs to work together to make things happen? and 2) how are different leaders and institutions going to work together in practice? The 'who' question can be clarified through the development of a partnering framework, based on systems and stakeholder analysis, assessment of the risks and dependencies associated with 'a managing and influencing' analysis, joined-up mandates and budgets, and identification of internal and external relationships that need to be strengthened. The 'how' question can be addressed through the development of adaptive leadership capabilities, i.e. collaborative attitudes and behaviours, responsiveness and creating an enabling environment, and the ability to reflect, learn, adjust and adapt.

Once a partnering approach has been adopted, it is crucial to build capacity in the seven attributes of successful partnering. These building blocks of good partnering are based on global best practice in collective impact. They include:

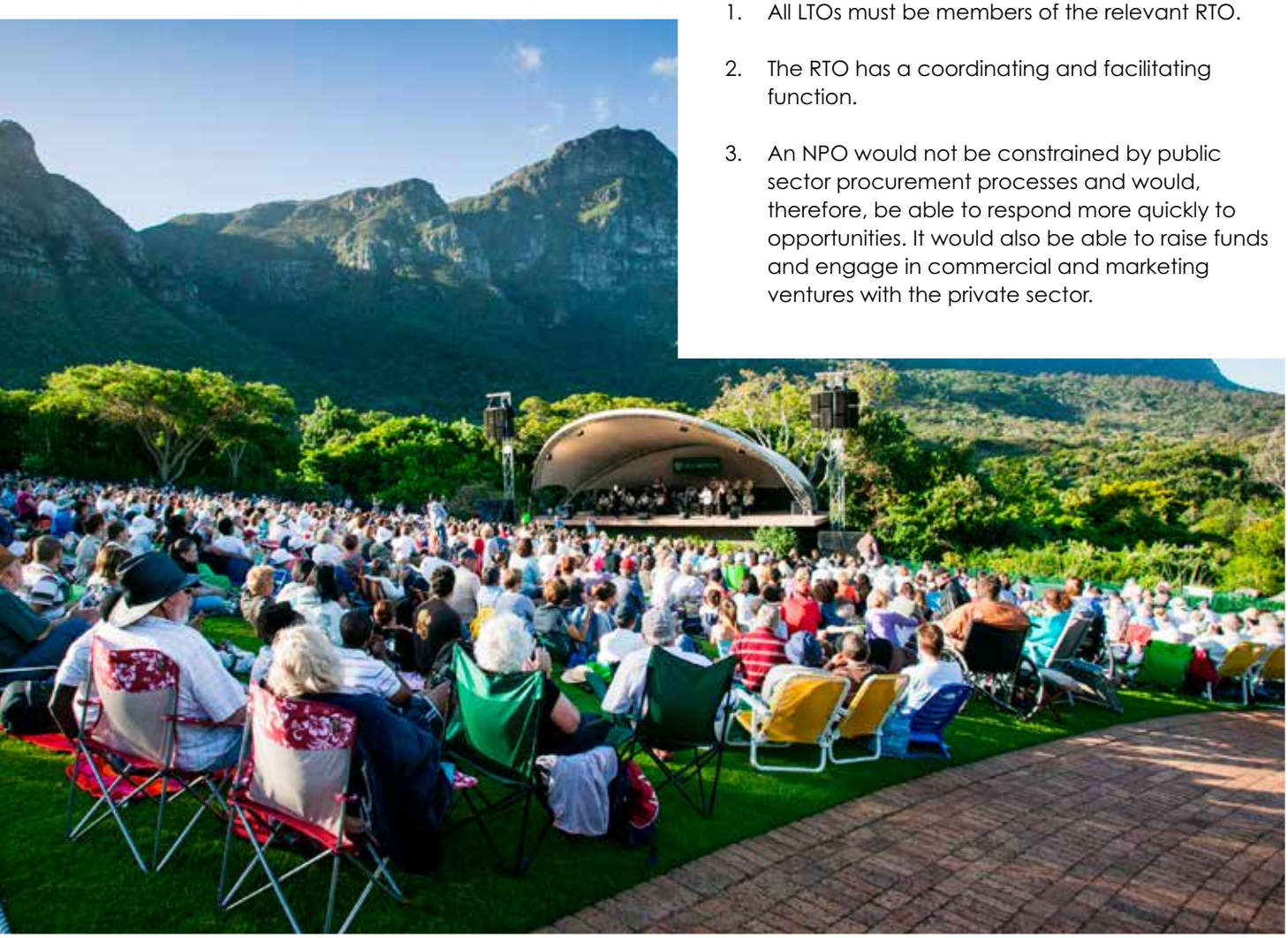
1. Shared goals and objectives
2. Joint activities
3. Pooled resources
4. Collaborative governance with backbone support
5. Joint communications
6. Enabling processes, technologies and systems
7. A collaborative culture, leadership and attitude.

Recommendation 2:
The coordination of tourism should be located at the district level.

1. The role of the RTO and district municipality would be coordination and facilitation.
2. This coordination would mean that the regional brand messaging is a clear story about what the region offers.
3. The district municipality would pull together the LTOs and the municipal representatives. The LTO brings the local story into the district level discussion.

Recommendation 3:
The RTO should be an NPO funded by the district municipality with LTO representation.

1. All LTOs must be members of the relevant RTO.
2. The RTO has a coordinating and facilitating function.
3. An NPO would not be constrained by public sector procurement processes and would, therefore, be able to respond more quickly to opportunities. It would also be able to raise funds and engage in commercial and marketing ventures with the private sector.



Recommendation 4:

The LTO model should be legislatively formalised through the drafting of an Act This model would be characterised by the following:

1. LTOs exist at the municipal level, given the trend showing declining visitor numbers to physical offices in individual towns.

2. The LTO exists as an Non-Profit Company (NPC), funded sufficiently by the municipality. The LTO should still be able to raise additional funds from the private sector. The NPC model is most appropriate since it allows the LTO to function as a business and frees it from public sector regulations and processes which would impact negatively on its effectiveness.

3. A small, expert board governs the LTO.

4. The LTO has a mandate for marketing, visitor services, promotion and local tourism-related business support. The RTO will play a coordination role. Tourism development will sit firmly within the municipality.

5. A clear mechanism for sustained funding, for at least three years, by municipalities.

6. The promotion of collaboration between the public sector, the private sector and communities.

7. The LTO has a strong link into the municipality. It has to be directly linked to the municipality, so there is a process of working together (strategy, planning, shared vision and shared accountability).

8. The LTO supports the facilitation of tourism development by referring private sector walk-ins to the correct organisation or person. It is not responsible for growing businesses or providing the services itself but provides a facilitation role.

Recommendation 5:

The relationship between tourism and the broader ecosystem needs to achieve four clear goals:

1. Enable increased benefit to communities from tourism activities to address the current separation of the visitor experience and the local experience.

2. Ongoing advocacy for responsible tourism to drive inclusive, equitable and sustainable development.

3. Allow the development of shared narratives about the place.

4. Tourism and place-making cannot be separated, e.g. clean streets benefit residents and tourists alike, so urban management and good infrastructure are essential.

Recommendation 6:

The relationship between tourism entities and municipalities should be structured so that roles, processes and aims are clearly defined This relationship would be structured as follows:

1. Tourism should be located in the LED portfolio and should be specified as a funded function under LED.

2. There should be a shared understanding of the value of tourism across the whole municipality, including the political structures.

3. Tourism and tourism development activities, such as spatial planning, etc., should be better aligned within the municipality.

4. The municipality should produce a tourism plan, and the LTO business plan should align with this tourism plan.

5. The function of the tourism unit within the LED should be an advocacy and coordination role.

6. The LED officer would do LED and tourism, i.e. they should not be separated. The LED officer needs to be sufficiently aware of the importance of tourism in all the LED processes, and the LTO needs to be in constant communication with the LED officer so that he/she can address issues that are relevant both for tourists and residents.

7. The capacity for understanding the importance of tourism needs to be developed within the municipality.

8. Tourism should be part of all official planning documents (SDF, LED, IDP, SDBIP) and consultation should happen across the tourism ecosystem (LTO,RTO District, Wesgro).

9.10 Summary

Through a critical assessment of the regulatory environment and institutional arrangement within the tourism ecosystem of the Western Cape, a new approach to partnering has been put forward. This proposed new approach will work at strengthening the links within the tourism industry and improving the overall system performance.

10 Priorities and Growth Opportunities

The purpose of Tourism Blueprint 2030 is to create a framework for moving the tourism sector of the Western Cape forward over the next few years. Tourism Blueprint 2030 builds upon the achievements, insights, and knowledge of the entire industry through a collaborative process over the past two years. It establishes a vision with objectives that have considered the impact of Covid-19, changing trends, and visitor expectations to provide a practical roadmap for the future.

This chapter summarizes all the work done and sets opportunities that can help realise Tourism Blueprint 2030's vision and objectives.

The opportunities identified have been aligned to the Western Cape's five core tourism components, as indicated in Chapter 2.4. The five key focus areas are:

1. Tourism Infrastructure
2. Tourism product development
3. Destination Marketing
4. Visitor Service
5. Institutional Arrangement and Regulation

10.1 Tourism Blueprint 2030 Vision

Tourism Blueprint 2030, led by the Western Cape government, executed with the industry, and driven by society, aims to boldly build a thriving visitor economy that increases its contribution to the Western Cape economy while creating a sustainable and competitive destination for years to come.

10.2 Tourism Blueprint 2030 Targets

The action plan needed to deliver on Tourism Blueprint 2030's vision of building a thriving and sustainable visitor economy that contributes to the Western Cape economy needs to consider how to grow demand and arrivals of high-value tourists from the domestic and international markets selected.

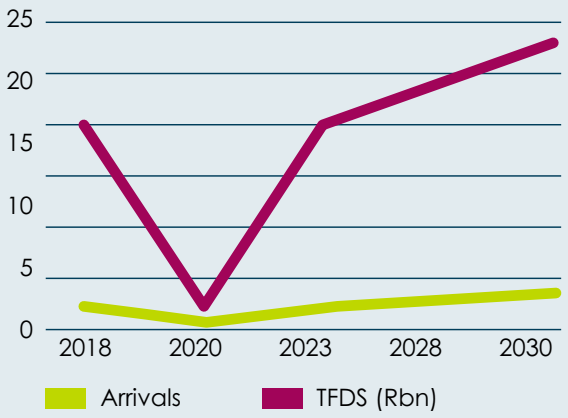
International Targets:

- Total Foreign Direct Spend: R23.7 billion
- Total Arrivals: 3 million

Domestic Targets

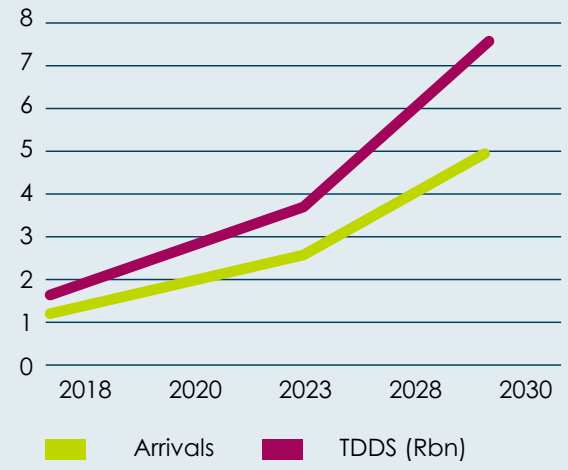
- Total Domestic Direct Spend: R7.5 billion
- Total Domestic Trips Taken: 5 million

Figure 85: Western Cape international arrivals and TFDS targets



Source: DEDAT, 2020

Figure 86: Domestic trips taken and value targets for Western Cape



Source: DEDAT, 2020

10.3 Criteria for success

- Industry Leadership

To bring these ideas to reality and garner more support from society, industry leaders can start the process by backing some ideas or implementing them. This type of approach will also provide a structure for public entities to support.

- Partnerships

The past has shown us the power of the Western Cape tourism industry's ability to partner together and work together. And the outcome of such actions has been the ability to achieve mutually beneficial goals.

- Leveraging resources

Today, industry and government entities are facing limited fiscal and organisational resources. As plans develop to carry out Tourism Blueprint 2030, resources from both the private and public sectors should be assessed and leveraged to prioritize objectives.

10.4 Opportunity 1

To open the Western Cape to more international tourists by working together to remove barriers over the next 10 years.

Reference: Section 1 and 7

Action Plan Reference: Tourism Infrastructure

The Western Cape has a vast amount of potential, allowing it to compete globally as Africa's top destination. However, growth has not lived up to the expectations of the industry. By addressing the significant barriers impacting tourism growth, the province can take advantage of the global expansion of tourism in the post-Covid world.

The priorities are:

- The opening of the African skies will increase the frequency of flights to South Africa and the Western Cape, thereby reducing travel costs to the destination, amongst other advantages. (Air Access)
- The implementation of e-visas and efficient visa on arrivals systems (Visa regime)
- The continued investment into health, safety, and security resources, e.g., visible policing in hot spots to create safer spaces for citizens and visitors (Safety and Security)

Another barrier identified in section 7 | international market potential was the lack of knowledge of the destination in markets that show potential. This will be addressed further under action plan 3 | destination marketing.

10.5 Opportunity 2

Responding to emerging trends to help identify product and experiential development opportunities to support the industry

Reference: Section 3, 4 and 7

Action Plan Reference: Tourism Infrastructure, Tourism Product Development, Destination Marketing, Visitor Services

The travel and tourism industry's ability to respond to relevant forces, trends and understand the impact of online conversations on promoting a destination is critical for business success.

Forces that may impact the tourism industry over the next few years are:

1. Ageing population: A large volume of over 60-year-olds with disposable income can be spent on

travel and vaccinated against Covid-19. Businesses focused on this segment need to respond to health, safety and security, and mobility needs.

2. Urbanisation: Destination management and urban planning will need to be mindful of seasonal influxes of visitors when planning for current and future product and infrastructure developments.

3. Climate change: In developing countries such as South Africa, there will be an accelerated demand for natural resources, and the government will need to respond by developing new regulations, and businesses and communities will need to respond by creating new behaviours to help reduce dependency on natural resources. There will also be an expectation from tourists to be more mindful when visiting afflicted areas.

4. Technology shifts: Job creation within the travel and tourism industry will need to focus on data analysts, software developers, and social media specialists. Jobs that require "human skills" such as sales and marketing, innovation, and customer service are expected to increase in demand.

5. Empowerment of the individual: Tourists' expectations are evolving and placing greater importance on holiday destinations and businesses to be accountable for their impact on society and the environment (triple bottom line).

6. Wellbeing: The travel and tourism industry will need to weave health and wellbeing into all aspects of their offerings.

Understanding the popular emerging trends as discussed impacting tourists both domestically and internationally in section 3, opportunities in shaping the product offering and messaging can also be found. This list is not exhaustive but should be used as a starting point for the action plan.

Figure 87: Emerging trends and market alignment

10.5.1 Finding insights in online conversations

Tourists independently organise their holidays, leisure time, business trips, and opinions on destinations freely online. This large deposit of information provides the public and private sector with insights and knowledge to develop the supply and demand sides of tourism.

In Tourism Blueprint 2030, a survey of online conversations is reviewed, and insights are given into how tourists experienced and perceived the various districts and towns.

In section 4, Tourism Blueprint 2030 identified potential growth opportunities for each district based on online sentiment. The opportunity for each district is to look at the development of these types of assets and experiences to attract more visitors. This list is not exhaustive but should be used as a starting point for discussion.

Table 53: Online conversations and product development potential

10.6 Opportunity 3

To support the districts in defining and building well-run and well-placed visitor attractions that can create new nodes of interest and tourism routes throughout the province

Reference: Section 4

Action Plan Reference: Tourism Infrastructure, Tourism Product Development, Destination Marketing,

Visitor attractions have different roles to play in influencing a tourist's decision to visit a place. Visitor attractions thrive when clustered together to form a route of complementary experiences. Clustered nuclei of tourism activities can overcome the need for one dominant feature. Tourism Blueprint 2030 developed three clusters and provided each district with a sample of how the clustering could work and provided opportunities for gaps identified. These are further unpacked in the action plan.

The opportunity for towns, districts, and businesses ensure that as many attractions as possible fall into the primary nuclei, thus providing multiple motivations to visit the destination.

The primary nuclei contain markers that are known to the tourist at their place of origin and often provide the main motivation to travel (Dredge, 1999). They usually include iconic attractions that are influential in the tourist's decision to travel – they are a drawcard (Edelheim, 2015). For a visitor attraction to have a primary influence on a touris's destination, it would require that information is available pre-visit such that it stimulates the motivation to visit the site.

Attributes of primary nuclei:

1. Iconic attraction
2. Information is readily available pre-visit so that the visitor attraction can act as part of the pre-trip decision-making
3. Attraction receives ample media attention

Seasonal nuclei

Secondary nuclei of attractions are known to the visitor pre-visit but do not play a significant role in the decision-making of the trip (Leiper, 1990).

Tertiary nuclei of attractions are those that are unknown pre-visit but discovered after arriving in the destination (Leiper, 1990).

10.7 Opportunity 5

To help rebuild and re-imagine the Business Events industry in a post-pandemic environment

Reference: Section 5

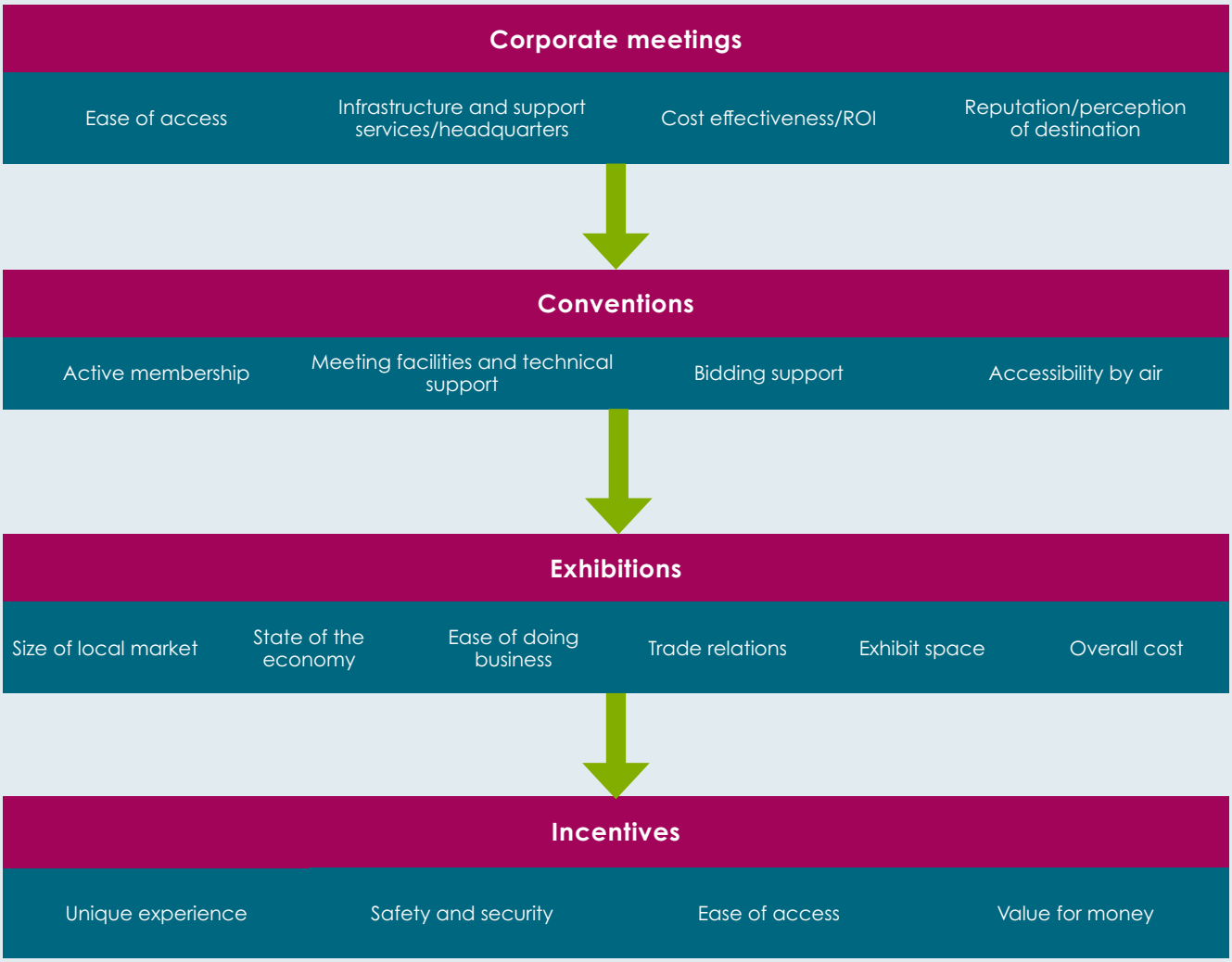
Tourism Component: Tourism Infrastructure, Tourism Product Development, Destination Marketing

Business travel will take longer to recover, and even then, we estimate it will only likely recover to around 80 percent of pre-pandemic levels by 2024 (McKinsey, 2021).

By assessing the business events industry, both globally and locally, the following gaps and opportunities present themselves for discussion.

However, the constant need to reduce costs and navigate digital disruption while improving the visitor experience will put immense pressure on the destination and the business events industry. Competition to be the preferred business events destination on the continent is rapidly growing, and a focus on a new and innovative destination positioning is required.

Figure 95: Key requirements for decision makers



Source: South African National Convention Bureau, 2020

10.8 Opportunity 6

To help latent forms of tourism achieve their full potential

Reference: Section 6

Tourism Component: Tourism Infrastructure, Tourism Product Development, Destination Marketing

Stakeholders in the Western Cape identified three forms of tourism as having significant potential in return on investment but are not currently reaching their full potential. Tourism Blueprint 2030 reviewed these three to determine what actions needed to be taken to take advantage of them. Steps to drive these forms forward have been further unpacked in the action plan.

10.8.1 Cruise Tourism

Cruise tourism has been a booming segment in recent years. In 2018 it was the fastest-growing sector in the tourism industry, with an annual growth of 7.4% according to the Cruise Line International Association (CLIA, 2019), the world's largest cruise industry trade association representing 50+ Cruise Lines and more than 95 percent of global cruise capacity.

There is an opportunity for Cape Town and the Western Cape to take advantage of the steadily growing demand from consumers who wanted to cruise and the supply from cruise liner companies. The destination and the tourism value chain need to understand how to leverage these additional visitors through onshore spending, shore excursions and tours, and in-port spending from cruise companies themselves (i.e., purchase of selected food, flowers, and wine).

Other opportunities include local crew replacing foreign crew, and ship maintenance would provide additional employment opportunities for workers such as shipbuilders, welders, and electricians.

10.8.2 Halal Tourism

The burgeoning growth of the global Muslim travel population signals an immense potential for Muslim travel-related products and services. According to the Mastercard-CrescentRating Global Muslim Travel Index 2017 (GMTI 2017), there were an estimated 121 million Muslim international travellers in 2016; this is projected to grow to 156 million by 2020. This market segment has been acknowledged as the 'third one billion' opportunity following the interest in Indian and Chinese billions (Janmohamed, 2016) and is predicted to reach 30% of the world's travel population by 2050 (Pew Research Centre, 2017).

The opportunity for the Western Cape to take advantage of the steadily growing demand from Muslim travellers is immense. The destination and the tourism value chain need to understand the nuances around faith-based travel and how to evaluate their products to meet the needs of this highly lucrative travel segment. South Africa already ranks high in the Global Muslim Tourism Index 2019, and there is an opportunity to improve the awareness of the Western Cape to take advantage of this.

10.8.3 Sports and Events Tourism

Sport and events tourism have a natural synergy, and well-hosted events amplified by a clear tourism strategy can positively impact the economy, the destination's image, and the lives of the citizens of the Western Cape.

Events create a sense of urgency and drive demand, expenditure, and geographic spread.

There is, however, complexity and uniqueness because it cuts across so many national, provincial, city, and town resources. This layered structure means that no single government department or agency is responsible for events at a national, provincial, city, or town level.

There is an opportunity to enhance further initiatives such as the Integrated Events Strategy (IES) and the Western Cape Events Forum have helped bridge the gap.

10.9 Opportunity 7

To identify and attract highly lucrative international tourism spend by aligning the Western Cape's unique and diverse experiential offering with specific international tourist's interests and needs

Reference: Section 7

Tourism Component: Tourism Product Development, Destination Marketing, Visitor Services

10.9.1 International Targets:

Total Foreign Direct Spend: R23.7 billion

Total Arrivals: 3 million

10.9.2 Market segmentation

Markets were segmented based on the following criteria:

2019 top arrivals to the Western Cape

Markets showing great potential growth over the next few years for the Western Cape

Outbound value of the top markets per continent

10.9.3 Barriers to growth

The ability to grow demand and attract tourists to the Western Cape relies heavily on tourists' willingness to travel to Africa based on their perceptions, word of mouth influences, or previous experiences. Barriers such as **health and safety concerns, lack of knowledge of the destination, complicated visa regimes, and expensive routes to the destination, which impact travel costs**, need to be addressed urgently if the province wishes to take advantage of growth from international markets. In the action plan, each of these barriers are addressed in the relevant sections.

Figure 88: International market potential at country level

Africa:	Americas:	Europe:	Middle East:
Nigeria	United States	Germany	Saudi Arabia
Kenya	Canada	UK	Kuwait
Angola	Brazil	France	UAE
		Italy	

10.9.2 Forms of tourism

Taking a consumer-centric approach, Tourism Blueprint 2030 reviewed tourists from markets that showed the greatest potential to travel to the Western Cape to understand their main reasons for travel better. Tourism Blueprint 2030 then overlaid these motivations with the Western Cape's unique offerings to help identify primary, secondary and tertiary forms of tourism for the sector to focus resources on.

Based on the outcome of this analysis, recommendations have been put forward in the action plan focusing on Tourism Product Development, Destination Marketing and Visitor Services

Figure 89: Forms of Tourism for product development and packaging

Primary Forms of Tourism:

Nature-based tourism: Tourism that relies on experiences directly related to natural attractions (e.g., beaches and shorelines). Adventure tourism can be seen as a sub-segment thereof.

Culture and heritage tourism: Tourism that relies on experiences directly related to tangible and intangible cultural attractions (e.g., historical and heritage sites).

Health and wellness tourism (with medical tourism and a sub-segment thereof): Tourism that relies on experiences that contribute to physical, mental, or spiritual health through wellness-based activities (e.g., retreats).

Food and wine tourism: Tourism that relies on experiences directly related to food and/or wine (e.g., food routes)

Shopping tourism: Tourism that relies on experiences directly related to the acquisition of products (e.g., locally produced brands)

Sport and events tourism: Tourism that relies on experiences directly related to viewing or participating in sports and/or a wide variety of events (e.g., music festival or school sports festival).

Secondary Tourism:

LGBTQ
Religious Tourism
Film Tourism
City breaks

Tertiary Tourism:

Business Events
Corporate travel

The above is not an exhaustive list but is intended to provide a framework for the action plan.

10.10 Opportunity 8

To build a region that is highly attractive to the domestic market, building this into a valuable tourism source market for the Western Cape for the future

Reference: Section 8

Action Plan Reference: Tourism Infrastructure, Tourism Product Development, Destination Marketing, Visitor Services

The Western Cape has the opportunity to help grow the domestic tourism holiday pie for South Africa and not merely just move tourists from one area to another. To achieve this, the public and private need to work together to develop a product mix and pricing model that makes the province affordable and accessible.

The public sector needs to look at investing in infrastructure projects that focus on improving accessibility to and within the province e.g., increased flights to George Airport.

10.10.1 Domestic Targets

Total Domestic Direct Spend: R7.5 billion

Total Domestic Trips Taken: 5 million

10.10.2 Market segmentation

The action plan will focus on building demand from the country's two economic hubs, Gauteng, and the Western Cape as a starting point.

10.11 Opportunity 9

To align the regulatory environment and institutions within the tourism ecosystem to strengthen links and improve the overall performance of the industry

Reference: Section 9

Action Plan Reference: Institutional Arrangements

A critical component of Tourism Blueprint 2030 is legislation and partnerships. An assessment and review of the regulatory environment and institutional relationships in the tourism ecosystem was undertaken.

Recommendations include:

- Place collaboration at the core of the Tourism Blueprint 2030.
- The coordination of tourism should be located at the district level.
- The RTO should be an NPO funded by the district municipality with LTO representation as an alternative where capacity constraints hamper the performance of these offices.
- The LTO model should be legislatively formalized through the drafting of an Act.
- The relationship between tourism and the broader ecosystem needs to enable increased benefit to communities from tourism activities to address the current separation of the visitor experience and the local experience, and to allow the development of shared narratives about the place.
- The relationship between tourism entities and municipalities should be structured so that roles, processes and aims are clearly defined.

The new approach to partnering that has been proposed in Tourism Blueprint 2030 will work at strengthening the links within the tourism industry and improving the overall industry's performance.

10.12 Opportunity 10

Transformation

Action Plan Reference: Tourism Infrastructure, Tourism Product Development, Destination Marketing, Visitor Services, Institutional Arrangements.

The transformation opportunity for tourism is aligned with the NDP 2030, NTSS 2020, NDT Tourism Recovery Plan and the Amended Tourism B-BBEE Sector Code to unfold the vision into reality.

Transformation forms part of numerous components of the Tourism Blueprint but will mostly be given effect in the tourism product development component (see action plan). The entrepreneurship and business development needs of the tourism value chain will be a separate programme linked to the product development and destination management components of the action plan. The transformation objectives will be a core component of support mechanisms and product development activities that will be rolled out over the next 10 years to promote sustainable transformation that promotes an equitable society where opportunities are not defined by race, gender, class or religion.

The strategic objectives of the NDT Strategic Plan which the tourism blueprint is aligned to but not limited to are as follows:

- accelerate the transformation of the tourism sector
- facilitate the development and growth of tourism enterprises to contribute to inclusive economic growth and job creation
- facilitate tourism capacity-building programmes
- diversify and enhance tourism offerings
- provide knowledge services to inform policy, planning and decision-making
- reduce barriers to tourism growth to enhance tourism competitiveness.
- enhance regional tourism integration.
- create employment opportunities by implementing tourism projects.

10.13 Tourism Blueprint Implementation

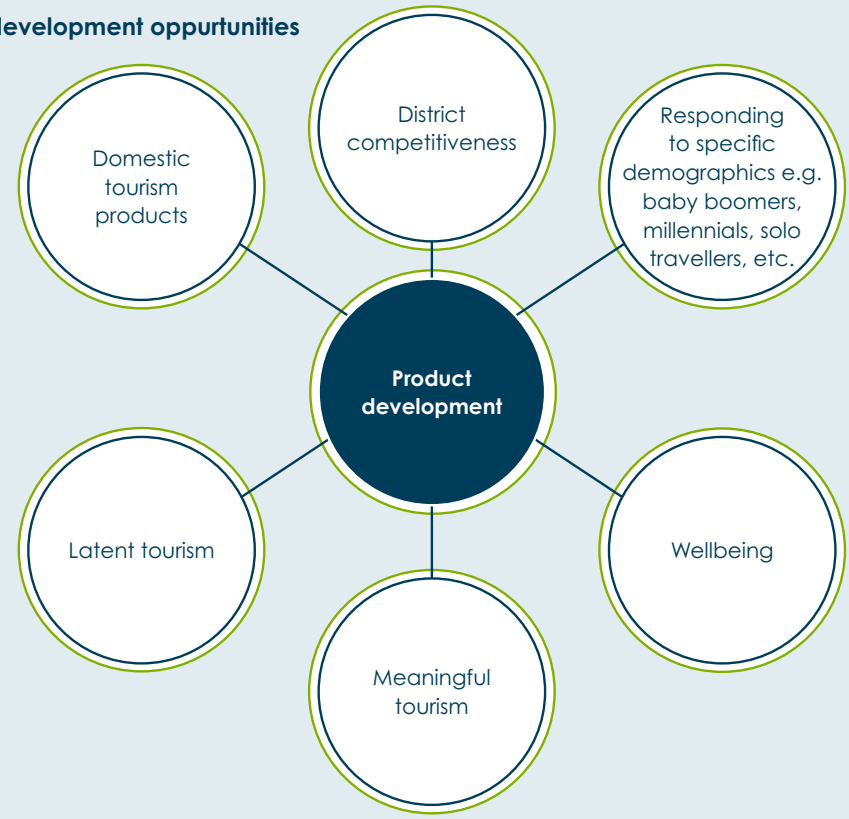
Each of the opportunities have been summarised in alignment with their provinces core tourism components.

10.13.1 Tourism infrastructure

Figure 90: Tourism infrastructure oppurtunities

10.13.2 Product development

Figure 91: Product development oppurtunities



10.13.3 Destination marketing

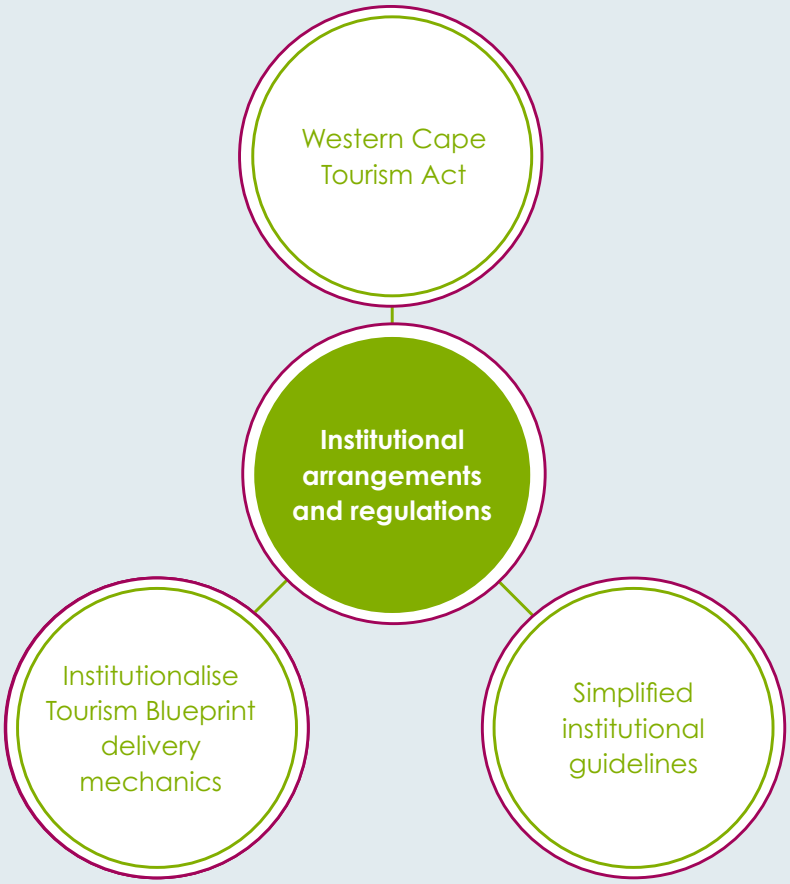
Figure 92: Destination marketing oppurtunities

10.13.4 Visitor services

Figure 93: Visitor services oppurtunities

10.13.5 Institutional arrangements and regulations

Figure 94: Institutional arrangements and regulations opportunities



10.14 Conclusion

Through the collaborative process undertaken to develop Tourism Blueprint 2030, opportunities have been identified throughout the report and summarised in this section.

Section 11 | action plan is the living document of Tourism Blueprint 2030. The action plan takes each of the identified opportunities and further unpacks it into sub-actions, stakeholders, timeframes, priorities, and status. Stakeholders can update the action plan in real-time as shifts happen, new opportunities are identified, and tasks are completed. The action plan is a document for all stakeholders to own and is the framework that will help guide the industry in achieving the vision and objectives set out in Tourism Blueprint 2030. The action plan will be hosted on the following web-link with all related documents for the strategy www.westerncape.gov.za/general-publication/western-cape-tourism-blue-print-2030

11 Action plan matrix

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