

Introduction

Understanding tourism infrastructure requirements and how infrastructure can be used, as an accelerator to support and stimulate tourism development and economic growth is fundamental to planning for tourism in Western Cape. Since Government does not create jobs, there is a requirement to identify catalytic infrastructural investments with the aim to create an enabling environment to attract private sector investment and therefore stimulate employment and growth. As identified in Tourism in GEAR, Government must take the lead whilst private sector drives.

We have applied a structured and logical approach to the assessment of tourism potential of areas. We have prioritised areas for tourism development and investment using a "well argued rationale" by following our methodology applied in tourism planning studies used in South Africa and elsewhere. Application of the model is relatively simple. Implicit within any tourism planning initiative is the presence of a product and a market. Infrastructure can be used to mediate the two. The presence of adequate transport infrastructure is a pre-requisite of a developing tourism industry and an important base on which tourism plans and investment initiatives can be built. That is not to say that if transport infrastructure is adequate then tourism will develop in any destination. To build a road is not enough. **The presence of investment opportunities (potential) is non-negotiable.**

This report brings all elements together in a Tourism infrastructure investment framework (TIIF). It aims to provide a practical direction as to how Government can begin to capitalise on the extensive consulting process and research that has been undertaken as part of this study. Unless tourism starts making good on the promises that have been made then disenchantment will result and the spotlight will move away from the sector. *Now* is the time to act and capitalise on the momentum created and so influence delivery. The success of this strategy hinges on the capability of each and every player to assume responsibility and to help prepare the Western Cape for the expected growth of tourism in the Province.

Tourism is a highly competitive global business. South Africa and the Western Cape entered the market late and have a significant amount of catching up to do. The novelty of transformation and Nelson Mandela is in the past. Moving forward into the next phase of tourism development and growth is essential if South Africa is to become a global destination for tourism.

The Western Cape has the product to compete at an international level but there remains much work to be done. Strong product is not unique in the marketplace. The key issues discussed in the Tourism infrastructure investment framework must be addressed in an aggressive and proactive manner. Tourism is about choice, messages and competition and it is a high value business with little room for individual agendas and sentiment. Team Western Cape must start to communicate and act in a united manner or else the seed capital that has been provided by nature will not realise economic and social shareholder value across the Province.

TIIF focuses on the role of the Tourism Chief Directorate, Department of Economic Affairs, Agriculture and Tourism, and metropolitan and local authorities. There are other parties involved in tourism initiatives both at a government and para-state level, but it is not their "core" business. There needs to be leadership and direction. It is broadly accepted that these identified three players can play this role. The Department of Economic Affairs, Agriculture and Tourism is the designated "champion" and catalyst for delivery. It must act as a conduit bringing together all relevant and interested parties.

Key issue: safety and security		
Policy	Investment	Implementation
<ul style="list-style-type: none"> ■ Zero tolerance in designated tourism areas today, and awareness, participation and partnership tomorrow ■ Tourism Chief Directorate to ensure that tourism awareness programme form a key element of Provincial Human Resource Development Framework – important to align with national initiatives 	<ul style="list-style-type: none"> ■ Tourism police force in key tourism areas co-ordinated and funded at provincial level - linked to national level ■ Security points strategically located close to tourism information and amenities – communication linkages also critical ■ Ambassador programme introduced to compliment above at local level ■ Tourism awareness programmes expanded as part of the THRD framework 	<ul style="list-style-type: none"> ■ Create Tourism Safety Task Force which must work in conjunction with that at national level ■ Create Provincial Tourism Safety Strategy and Implementation Plan that feeds into that at national level ■ Assign roles and responsibilities to government, private sector, community and SAPS

Key issues

Tourism in the Western Cape faces many challenges in the next few years if it is to truly deliver on its potential. Safety and security and air access are non-negotiable. They must be addressed if tourism is to move forward in the Province.

Safety and security

Safety and security remains the singular most important issue affecting the future development of tourism in the Province and South Africa as a whole. Decisive and swift action is required. We believe that the creation of a safe and secure environment for tourism growth will require:

- partnerships between tourism industry stakeholders (government and private sector) SAPS and communities with regard to tourism policing;
- awareness and understanding amongst communities of the overall importance of tourism;
- enhanced participation of host communities in tourism - foster a sense of ownership and pride; and
- creation of a Cape Tourism Police Force modelled along the lines of such organisation in California, Thailand and Queensland.

DEAAT has already taken the lead through the establishment of the Tourism Safety Forum. There is a need to expand awareness and participation. The Western Cape seems to have weathered the impact of the sensational incidents such as the spate of bombings in Cape Town. Now may also an ideal time to establish as the Tourism Safety Task Force to action the many ideas and possible initiatives discussed in the forum. A Tourism Safety Strategy for the Province aligned with national initiatives will be an important deliverable of the Tourism Safety Task Force. There is no place to hide when tourists are affected by incidents of crime. No amount of infrastructure delivery, product development or marketing efforts will lead to tourism growth if this issue is not addressed immediately and without reserve.

Air access

In terms of air access to the destination, ease of access is a critical issue to growth of inbound tourism. Cape Town is located sufficiently far away from major global centres to ensure that air access is the only viable mode of transport. The lack of direct flights and the requirement to change terminals in Johannesburg is a negative to the Western Cape achieving desired growth.

Influence must be exerted upon South Africa Airways (SAA) to play a more proactive role in the growth of tourism not only in the Western Cape but also throughout the country. The desire to make SAA profitable prior to future privatisation is commendable however to achieve this to the detriment of tourism growth is bad business. SAA is at present time a national aviation carrier and a subsidiary of South Africa plc. In a large conglomerate some departments make less profit and/or have a service function in order to service the greater good.

Having said all of the above, we believe that the issue of air access is not only related to the role of SAA. Much more emphasis must be placed on the other elements of the distribution chain. For example, international tour operators like Barcelo, TUI and Airtours play an important role in determining travel behaviour and patterns. Relationships with these players must be built and requirements met. Historical focus of South Africa Tourism marketing partnerships has been on niche players in each key market. This will have to change. Product development in the form of hotels and resorts can also play a major role. The lack of major international hotel companies and resorts of a significant size has an impact on tour operators' leverage and airline demand.

In the short term, SAA is unlikely to expand its routes, new resorts are unlikely to be built and South African Tourism is unlikely to make a major difference given its marketing budget. The charter option must therefore be seriously considered. Tour operators package charter flights along with accommodation and ground

handling services. The flight is not scheduled and the plane is under control of the charter company. The Province should take the lead in developing a charter programme, perhaps together with the Eastern Cape. The combination of Cape Town, Garden Route and Addo would appear to be an attractive package tour. Alternatively initial emphasis could be placed on Cape Town as a single destination.

Tourism infrastructure investment framework
<p>Leadership</p> <ul style="list-style-type: none">■ what powers are responsible for what functions and activities – e.g. national/ provincial/ local government, quasi-government, private sector, etc; and■ who makes decisions and what criteria are used in making decisions – identification of institutional structures, bodies and individuals that will drive and communicate direction.
<p>Integrated management</p> <ul style="list-style-type: none">■ what policies and guidelines are required – an examination of all policies “shaping” the city and the creation of alignment and integration of tourism requirements are crucial;■ what are the province’s goals with regard to economic regeneration and how do these relate to identified tourism requirements; and■ what plans and initiatives are in place and what is planned for the future – tourism must position itself in order to influence direction.
<p>Quality control</p> <ul style="list-style-type: none">■ who implements to ensure desired delivery and who is responsible for the ongoing management, control and maintenance of identified tourism projects

Objectives of the Tourism infrastructure investment framework (TIIF)

The key objectives of TIIF are to provide practical recommendations to take forward the concepts outlined in the previous phases of the study and identify projects which can be placed into decision making processes and capital expenditure programmes. Responsible governance is recognized as **leadership, integrated management** and **quality control**. The alignment and harmonization of province-wide planning must focus on establishing transparent and rapid communication channels and adoption of defined frameworks for delivery.

As identified in the Tourism Spatial Framework for Western Cape, the following questions must be answered in order to employ the necessary powers and skills that will champion the change required:

In order to fulfil this role it is essential that related and dependent government departments at all levels work together toward common goals and objectives. This rarely happens in South Africa at the present time and is a major obstacle to delivery. Change must occur in the attitude and approach of government departments both to each other and working together. The relevant departments and agencies acknowledge this and a good foundation for providing practical solutions that should inform change exists. Momentum must not be lost.

Tourism has a unique opportunity in Western Cape. It has been placed in a position where it can influence economic development strategy. This project is a first phase of a strategy of influence that brings on board public sector, private sector and communities. As a first step, TIIF recognizes the need for tourism to engage and work together with other parties in order to achieve delivery. It also recognizes that delivery is unlikely to be achieved overnight. Relationships and structures that do not exist (or those that have been neglected) will have to be forged or created. TIIF aims to set the scene for a new agenda for tourism in Western Cape and follows the principles adopted for the development of TIIF at national level.

Developing a Tourism Infrastructure Investment Framework

The principles upon which we have formulated TIIF are simple but form the basis of good and effective governance. They are set out below:

Principles of TIIF	
<i>Objectives</i>	<ul style="list-style-type: none">■ what goals have been set as part of the Spatial Framework and how do these relate to objectives at national, regional and local levels;
<i>Leadership</i>	<ul style="list-style-type: none">■ who will lead the process of communication and alignment and “champion” tourism, what institutional arrangements exist and/or need to be put in place and what relationships need to be developed and improved.
<i>Policy</i>	<ul style="list-style-type: none">■ required integration of national, provincial, regional and local policy and identification of guidelines for tourism infrastructure investment;
<i>Investment</i>	<ul style="list-style-type: none">■ what investments are being put forward by tourism at national, provincial level and local levels;
<i>Implementation</i>	<ul style="list-style-type: none">■ the next steps toward action and delivery.

It has become increasingly apparent that strong unifying leadership is required in order to co-ordinate tourism in South Africa and achieve promised delivery of jobs, investment and growth. Without strong

leadership, tourism will continue to be sub-ordinated to various agendas within national, provincial and local government and provide private sector with little of the direction promised in Tourism in GEAR. Tourism planning will continue to occur in a vacuum and duplication will become the norm.

Practical application of TIIF

Tourists consume infrastructure like services and products. A Tourism Consumption Point (TCP) is an investment opportunity to the private sector and means of employment creation and economic enhancement to Government. Through the existence and provision of different types of infrastructure a TCP is viable.

The different types of infrastructure linking product to market are as follows:

- Transport - required to safely and efficiently transport the tourist to the TCP i.e. road, rail, air and sea;
- Delivery - infrastructure required to sustain a private sector investment opportunity i.e. includes the elements required to sustain the consumption point based upon the existence of an adequate transport network, (e.g. information and amenities, private coach, taxi, car hire, electricity, water, security, public transport); and
- Locational (or product) infrastructure - includes the scenic or built environment, culture, trade and commerce, shopping and entertainment etc. necessary to ensure that the TCP is able to attract tourists in the first place.

The presence of a product and market is implicit. It is an expensive exercise to create product from “scratch”. It is in the Government’s interests to concentrate on creating an enabling environment in order to attract private sector investment.

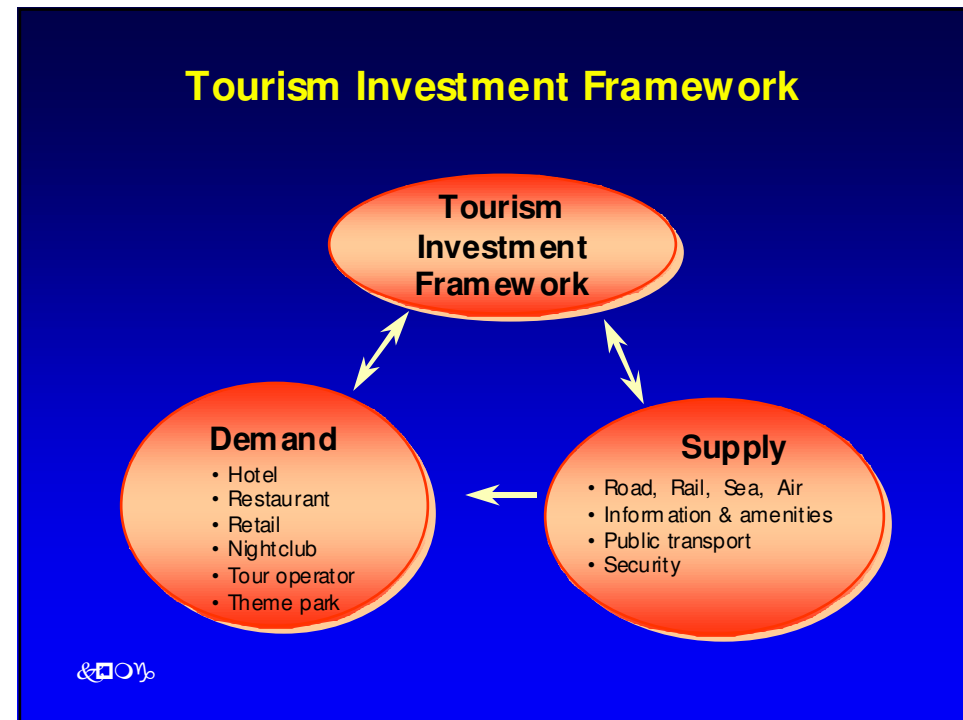
An integrated approach has to be adopted by all relevant stakeholders. Effective co-ordination of effort through the endorsement of a strategic approach to tourism development and promotion is not just desirable but essential if the right conditions for growth are to be created. We have provided practical recommendations on the actions required to take forward the concepts outlined during the course of the study and identified tourism infrastructure investment opportunities that can be placed into decision making processes. The plan incorporates both longer-term strategic actions and actions to achieve specific outcomes in the short term.

This study does not focus on project scoping. To maximise resources and create an enabling environment which attracts private sector investment, projects have to be put forward as part of a plan or strategic vision that takes account of the bigger picture. This approach enables private sector to identify synergies, limit risk due to clustering and achievement of critical mass and open discussion on marketing opportunities and linkages. Linkages between complimentary products are fundamental to growth.

The application of TIIF to investment opportunities is critical both to credibility and to delivery. If investment opportunities are not identified then TIIF will be in danger of being labelled another “talk shop”. This must be avoided at all costs. TIIF must offer the opportunity to deliver an investment opportunity as part of a structural plan for tourism in Western Cape. However, the Chief Directorate of Tourism is not a delivery department, but it can however influence and lobby.

We have assessed the tourism infrastructure requirements on the basis of the identified tourism development areas (TDA) and have provided direction of potential investment opportunities. Because our brief does not extend to project scoping within precincts i.e. master planning, it is not relevant nor possible to pinpoint specifics within a TDA. However, guidance is provided through the Tourism Spatial Framework on the potential investment requirements. It now becomes a matter of prioritisation and focus. Investment requirements for the Foreshore for example should be given top priority. Using TIIF and the Tourism Spatial Framework assessment as a base, the Tourism Chief Directorate can communicate the rationale for these projects to the relevant delivery department or agency. The projects are therefore placed in the pipeline and will be assessed according to defined criteria.

The identified opportunities are supply side measures. By investing in the supply side, it is possible to achieve future leverage of private sector investment. Synergies at a supply level could also result in public and private sector partnerships.



An important question that must be asked is - will the investment make a difference? This has been our main criteria in putting forward possible investment opportunities. It is difficult at a macro level to assess the impact of individual investments and prioritise accordingly. Each investment has merit and will need to be assessed using clearly defined criteria. This is not the purpose of this study.

Communication, structured decision making, definition of clear lines of responsibility and role players' commitment and engagement will inform delivery.

Western Cape Tourist Infrastructure Requirements - Road

Objectives	Leadership	Policy	Investment	Implementation
<ul style="list-style-type: none"> ■ To maximise the level of “sunk” investment in the road network. ■ To define the strategic tourism road network based upon current and future tourism routes. ■ To identify gaps and blockages related to the road network which may inhibit tourism flows. ■ To provide inputs and engagement related to the above as requested by Moving South Africa. ■ To identify areas of inter-modal opportunity and connectivity. 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate (TCD) communicates Spatial Framework to Provincial Transport Branch and takes an active role in future planning decisions related to routes. ■ DEAAT introduces Tourism Spatial Framework and Investment Framework through appropriate structures such as PROVCOM and PROVTECH to road transport stakeholders. ■ TCD must be pro-active and advise the Provincial Transport Branch and local authorities on potential opportunities and developments by monitoring future tourism flows in consultation with local authorities, private sector and other relevant stakeholders. ■ TCD to pro-actively work with provincial branches dealing with Transport, Works, and Planning as well as with district councils and the City of Cape Town to communicate tourism-industry perspectives on deficiencies in road transport and projects to address these deficiencies. ■ TCD to engage with local authorities to communicate tourism infrastructure priorities for incorporation into sectoral plans and IDPs. 	<ul style="list-style-type: none"> ■ Alignment of national and provincial objectives at all levels in order to achieve integrated management and ensure the inclusion of tourism within infrastructure delivery. ■ Optimising the use of transport infrastructure as a key element 	<ul style="list-style-type: none"> ■ See TDAs summary 	<ul style="list-style-type: none"> ■ Presentation to Provincial Portfolio Committee. ■ Inter-departmental liaison procedure established at provincial level and actioned. ■ Establish Tourism Transport Task Force consisting of DEAAT and tourism sector roleplayers, e.g. SATSA, Tour Guides Associations, Sedan Taxi Associations, ACSA, etc. ■ Adopt a “strategy of influence” at national and provincial level to meet defined tourism objectives. ■ Provide input into capital works programmes in a structured and logical manner. ■ TCD provides Tourism Spatial Framework and Investment Framework as input into Integrated Development Planning at local authority level.

Western Cape Tourist Infrastructure Requirements - Sea

Objectives	Leadership	Policy	Investment	Implementation
<ul style="list-style-type: none"> ■ To maximise the opportunity provided by the international growth of maritime tourism. ■ To facilitate opportunities for revenue generation and product enhancement through development on state owned land. ■ To build upon the impetus for port and harbour development provided by the Victoria and Alfred Waterfront and small harbour developments ■ To provide input on the most appropriate way forward regarding the development of a cruise terminal in Cape Town. ■ To integrate decision making between the major players and interested parties ■ To identify areas of inter-modal opportunity and connectivity 	<ul style="list-style-type: none"> ■ DEEAT must communicate and direct the targeting of development for tourism on non-essential public land around harbours. ■ TCD to engage with the Property Management Chief Directorate of the province to play an active role in identifying provincial assets that might be used for tourism purposes and generate revenue for the province. 	<ul style="list-style-type: none"> ■ Encourage focused, transparent and responsible development of harbours and related areas which takes account of all aspirations and interests ■ Decisions regarding strategic maritime tourism development must be made at a national and regional level and reinforce regional objectives based upon the "without frontier" principle. 	<ul style="list-style-type: none"> ■ Major <ul style="list-style-type: none"> - Cape Town ■ Minor <ul style="list-style-type: none"> - Lamberts Bay - Kalk Bay - Hout Bay - Gansbaai - Mossel Bay 	<ul style="list-style-type: none"> ■ Workgroup must be established to spearhead investigation into development of a cruise terminal (preferably part of Tourism Transport Task Force). ■ Assign and co-ordinate roles and responsibilities to implementation agency. ■ Discussion forum must be created at national and regional level (possibly in association with Port Manager's Forum).

Western Cape Tourist Infrastructure Requirements - Air

Objectives	Leadership	Policy	Investment	Implementation
<ul style="list-style-type: none"> ■ To define a hierarchy of airports based upon existing and future tourism flows, markets and volume. ■ To align provincial government policy on the strategic tourism air network and that developed at national level ■ To provide clarity on levels of decision-making, linkages to tourism planning and devolution of responsibilities. ■ To identify areas of inter-modal opportunity and connectivity. 	<ul style="list-style-type: none"> ■ DEEAT and Western Cape Tourism must provide input to decision-making process through liaison and engagement with National Department of Transport, Public Works and ACSA. ■ Provincial DEEAT and Western Cape Tourism must liaise with national DEAT and communicate its policy with regard to the strategic air network to the airlines, most particularly SAA. 	<ul style="list-style-type: none"> ■ Decisions regarding the strategic tourism air network must be made at a regional level and reinforce regional strategic objectives based upon the "without frontier" principle. 	<ul style="list-style-type: none"> ■ Primary <ul style="list-style-type: none"> - Cape Town - George 	<ul style="list-style-type: none"> ■ Co-operative relationship between national DEAT and MINME, national Department of Transport, ACSA and airlines. ■ Inter-regional liaison forum established which focuses upon tourism air links, airports and space management. ■ Decisions made on regional strategic air network and hierarchy based on future tourism flows, markets and volume and changes monitored on an on going basis.

Western Cape Tourist Infrastructure Requirements - Rail

Objectives	Leadership	Policy	Investment	Implementation
<ul style="list-style-type: none"> ■ To maximise the level of “sunk” investment in the rail network. ■ To provide increased opportunities for the new market to participate in tourism (i.e. post-industrial revolution tourism in Europe was based on rail - Manchester to Blackpool etc.) ■ To capitalise on the trend towards rail usage for purposes of international tourism (e.g. Blue Train, Bangkok, Singapore, Le Shuttle, etc.) ■ To identify areas of inter modal opportunity and connectivity. 	<ul style="list-style-type: none"> ■ National DEAT must introduce the concept of tourism and rail to Transnet, (Spoornet) and South African Rail Commuter Corporation and Metrorail along with potential opportunities and rationale. TCD has to communicate its vision and plans in this regard to national DEAT and so develop common goals. 	<ul style="list-style-type: none"> ■ Review carrying policy and undertake cost benefit analysis related to identified opportunities. 	<ul style="list-style-type: none"> ■ Cape Town – Knysna ■ Cape Town – Port Elizabeth ■ Cape Town – Lamberts Bay ■ Cape Town – Van Rhyndorp ■ Historical railways (see TDA summary) 	<ul style="list-style-type: none"> ■ Establish provincial liaison forum which focuses on tourism rail links and optimisation of rail transport in tourism product packaging (preferably under Tourism Transport Task Force). ■ Liaison procedure for communication of provincial needs to national level established. ■ Interface created with Transnet and Spoornet. ■ Assign roles and responsibilities to Tourism Transport Task Force.

Western Cape Tourist Infrastructure Requirements – Information distribution

Objectives	Leadership	Policy	Investment	Implementation
<ul style="list-style-type: none"> ■ To establish a framework for the provision, operation and management of information points (including tourism signage. Information laybys, information offices, etc.) ■ To create linkages between information points and other amenities which will assist in the creation of critical mass of tourist activity ■ To utilise the critical mass created to facilitate SMME development, most particularly arts and crafts, retail, food and beverage and tour operations. ■ To communicate to all relevant players the importance of information and amenities in the implementation of the Spatial Framework. ■ To maximise use of areas of inter-modal connectivity as information points 	<ul style="list-style-type: none"> ■ TCD must lead and facilitate alignment between spatial recommendations of Integrated Tourism Development Framework (TDF) and Tourism Signage Framework (TSF). ■ TCD in association with Transport Branch and its agents must drive implementation of TSF. ■ TCD together with Transport Branch must communicate inter-related nature of TDF and TSF and the need to ensure alignment of recommendations during implementation to relevant stakeholders – district councils, local councils and local tourism bureaus - an awareness campaign and delivery mechanism ■ TCD and Western Cape Tourism must place emphasis on the role that of the local level in information collection (product and market) and dissemination. 	<ul style="list-style-type: none"> ■ Adoption of a provincial tourism signage framework aligned to Integrated Tourism Development Framework ■ Adoption of strategy to enhance linkages between SMME development, training and tourism information provision. 	<ul style="list-style-type: none"> ■ Across the Province within the Spatial Framework (refer TDAs) 	<ul style="list-style-type: none"> ■ Align Tourism Signage Framework with Integrated Tourism Development Framework ■ TCD and Western Cape Tourism to communicate integrated approach to information dissemination and management to stakeholders ■ Include Tourism Signage as specific area of focus of work group under Tourism Transport Task Force ■ Assign roles and responsibilities to implementation agents.

Western Cape Tourist Infrastructure Requirements - Public transport				
Objectives	Leadership	Policy	Investment	Implementation
<ul style="list-style-type: none"> ■ To make tourism destinations and attractions accessible to all. ■ To create a safe and secure environment for tourists and residents ■ To encourage mass transit aimed at providing greater accessibility to urban centers e.g. Knysna, Mossel Bay, Saldanha-Langebaan. ■ To facilitate the participation of the new market in tourism. ■ To make travel between gateway s, staging posts and destinations a “seamless” experience for tourists without cars. ■ To encourage the growth of emerging market tourism through the provision of a public passenger transport system. ■ To stabilise the industry by addressing issues e.g. illegal operators, road safety and passenger needs. ■ To communicate to public transport operators the importance of tourism and the ambassadorial role of their employees ■ To identify inter-modal opportunity and connectivity . 	<ul style="list-style-type: none"> ■ TCD must take an active role in promoting the concept of renewed investment in public transport. ■ TCD must emphasise the importance of the new market to future economic and social growth. ■ DEAAT initiates contacts with transport operators and introduces concepts. 	<ul style="list-style-type: none"> ■ Access to tourism for all through the best public transport system for all. ■ Licence and regulate all public transport providers. 	<ul style="list-style-type: none"> ■ Rail (as outlined) ■ Bus <ul style="list-style-type: none"> – Cape Town – Langebaan – Cape Town - Port Elizabeth – Cape Town – Knysna ■ Targeted investment in inter-modal connectivity <ul style="list-style-type: none"> – Cape Town – Port Elizabeth 	<ul style="list-style-type: none"> ■ Discussion forum between relevant government departments and agencies hosted by DEAAT and opportunities for growth of new market through public transport. ■ DEAAT and Department of Transport must work together with the public transport operators (especially taxi industry and tour operators) to address regulatory issues ■ Develop ambassador programme in consultation with taxi industry and other public transport providers. ■ Agree regulatory framework. ■ Exclude unregulated tourism transport from tourism and inter-modal areas.

Tourism Infrastructure Investment Framework

Tourism Infrastructure Requirements

Cape Town Foreshore

Objectives	Investment	Specification	Responsibility
<u>Air</u>	<ul style="list-style-type: none"> ■ Cape Town International 	<ul style="list-style-type: none"> ■ Monitor capacity of airport to accommodate large convention groups 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ Western Cape Tourism ■ ACSA
<u>Road</u>	<ul style="list-style-type: none"> ■ Foreshore 	<ul style="list-style-type: none"> ■ Support completion of flyovers to alleviate traffic congestion ■ Cycle paths linking foreshore to other parts of CBD and V&A Waterfront 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ Western Cape Tourism ■ DEAAT ■ City of Cape Town
<u>Public transport</u>	<ul style="list-style-type: none"> ■ Foreshore 	<ul style="list-style-type: none"> ■ Intermodal-connectivity point connecting major road and rail links into city ■ Investigate incorporation of tourist train terminal adjacent to convention centre precinct 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT ■ Spoornet ■ Convenco ■ Portnet ■ City of Cape Town
<u>Sea</u>	<ul style="list-style-type: none"> ■ V&A Waterfront extension 	<ul style="list-style-type: none"> ■ Purpose built cruise facilities and supporting infrastructure – investigate feasibility and requirements of cruise operators 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT ■ Portnet ■ City of Cape Town
<u>Streetscaping and landscaping</u>	<ul style="list-style-type: none"> ■ Foreshore 	<ul style="list-style-type: none"> ■ Trees, litter bins, benches, lampposts, and other design elements ■ Pedestrian walkways, cycle paths 	
<u>Information and amenities</u>	<ul style="list-style-type: none"> ■ Foreshore ■ V&A Waterfront 	<ul style="list-style-type: none"> ■ Tourism Information Centre ■ Retail ■ Food and beverage ■ Entertainment ■ Banking 	<ul style="list-style-type: none"> ■ Western Cape Tourism ■ DEEAT ■ CONVENCO ■ Cape Town Partnership ■ Private sector ■ Portnet
	<ul style="list-style-type: none"> ■ Signage 	<ul style="list-style-type: none"> ■ Visible, appropriate, consistent and regular directional and interpretive signage 	<ul style="list-style-type: none"> ■ DEEAT: Tourism and Transport ■ City of Cape Town ■ Private sector
<u>Security</u>	<ul style="list-style-type: none"> ■ Tourism police ■ Closed circuit cameras ■ Tourist Crisis Centre 	<ul style="list-style-type: none"> ■ Highly differentiated, visible and motivated tourism police force. ■ Roll camera network out into CIDs and areas of tourism activity ■ Dedicated centre providing for physical, language and emotional needs of tourists affected by criminal incidents 	<ul style="list-style-type: none"> ■ DEAAT ■ Western Cape Tourism ■ Department of Community Safety ■ SAPS ■ Cape Town Partnership

Forward planning	<ul style="list-style-type: none"> ■ Integrated tourism framework 	<ul style="list-style-type: none"> ■ Commissioning of Tourism Development Framework for Metropole, including spatial framework and detailed infrastructure investment framework; Identification of other TDAs and tourism spatial framework for the Cape Metropole. 	<ul style="list-style-type: none"> ■ City of Cape Town ■ Tourism Chief Directorate
Tourism Infrastructure Investment Framework Tourism Infrastructure Requirements Cape Flats			
Objectives	Investment	Specification	Responsibility
Security	<ul style="list-style-type: none"> ■ Tourism police 	<ul style="list-style-type: none"> ■ Highly differentiated, visible and motivated tourism police force working in conjunction with neighbourhood watch and community tourism forums, particularly in areas of 	<ul style="list-style-type: none"> ■ DEEAT ■ Western Cape Tourism ■ SAPS ■ Department of Community Safety ■ Community Tourism Forums or similar ■ Private sector
Information and amenities	<ul style="list-style-type: none"> ■ Khayelitsha ■ Langa ■ Gugulethu ■ Nyanga ■ KTC ■ Hout Bay ■ Athlone, etc. 	<ul style="list-style-type: none"> ■ Structured network of tourism information points supported by signage ■ Tourism awareness programmes ■ Arts and crafts training ■ SMME assistance programmes ■ Craft centres ■ Heritage centres ■ Security points 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ Western Cape Tourism ■ Provincial Department of Culture and Environmental Affairs ■ City of Cape Town ■ Private sector particularly facility and attraction operators and Township tour operators ■ Community Tourism Forums or similar ■ Provincial Department of Education ■ South African Heritage Resource Agency ■ Private sector
	<ul style="list-style-type: none"> ■ Signage 	<ul style="list-style-type: none"> ■ Directional and route signage linking information points, amenities and attractions in order to maximise economic benefit, achieve critical mass and enhance awareness 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ Western Cape Tourism ■ City of Cape Town
Public Transport	<ul style="list-style-type: none"> ■ Public transport hubs and inter-modal interchanges 	<ul style="list-style-type: none"> ■ Requirement for secure and clean public transport hubs 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ Western Cape Tourism ■ City of Cape Town
Product development support	<ul style="list-style-type: none"> ■ Khayelitsha ■ Langa ■ Gugulethu ■ Nyanga ■ KTC ■ Hout Bay 	<ul style="list-style-type: none"> ■ Structured process to identify natural and cultural resources underpinning growth of tourism and developing framework for commemorating and protecting significant places 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ Western Cape Tourism ■ Provincial Department of Culture and Environmental Affairs ■ City of Cape Town ■ Private sector particularly Township tour operators ■ Provincial Department of Education

	<ul style="list-style-type: none"> ■ Athlone, etc. 		<ul style="list-style-type: none"> ■ South African Heritage Resource Agency ■ Private sector
Forward planning	<ul style="list-style-type: none"> ■ Integrated tourism framework 	<ul style="list-style-type: none"> ■ Specific attention to incorporation of Cape Flats and other township areas in Integrated tourism development framework for Cape Metropolitan Area 	<ul style="list-style-type: none"> ■ City of Cape Town ■ Tourism Chief Directorate

Tourism Infrastructure Investment Framework

Tourism Infrastructure Requirements

Winelands Triangle

Objectives	Investment	Specification	Responsibility
Roads	<ul style="list-style-type: none"> ■ Helshoogte Pass ■ Paarl – Franschhoek ■ N2 – Stellenbosch 	<ul style="list-style-type: none"> ■ upgrade and repair to facilitate tourism flows 	<ul style="list-style-type: none"> ■ DEAAT: Transport Branch
Information and amenities	<ul style="list-style-type: none"> ■ Stellenbosch ■ Paarl ■ Franschhoek 	<ul style="list-style-type: none"> ■ Tourism Information Centre ■ Arts and crafts training unit ■ SMME Development Centre ■ Food and beverage ■ Security points 	<ul style="list-style-type: none"> ■ DEAAT ■ Western Cape Tourism ■ Boland District Council ■ Department of Culture and Environmental Affairs ■ Private sector
	<ul style="list-style-type: none"> ■ Signage 	<ul style="list-style-type: none"> ■ Consolidating tourism signage onto information lay bys or information boards ■ Connect route signage to “anchor” information points in Stellenbosch, Paarl and Franschhoek ■ Use tourism route signage to extend triangle in surrounding towns, e.g. Pniel, Wellington 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ Provincial Transport Branch ■ Western Cape Tourism ■ Boland District Council ■ Local authorities
Public transport	<ul style="list-style-type: none"> ■ Winelands Triangle 	<ul style="list-style-type: none"> ■ Provision of clean, regular train service – particular emphasis on usage by Cape Metro and provincial market ■ Expansion of concessions to heritage train operators 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ Department of Environmental and Cultural Affairs ■ Spoornet ■ Transnet Heritage Foundation
Protection of environment	<ul style="list-style-type: none"> ■ Historic town centres ■ Cultural and natural landscapes 	<ul style="list-style-type: none"> ■ Consolidation of tourism signage to protect heritage, scenic beauty and rural ambience ■ Control of outdoor advertising in rural areas ■ Due consideration for cultural and natural heritage 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT: Transport Branch ■ Department of Environmental and Cultural Affairs ■ Local authorities

Tourism Infrastructure Investment Framework

Tourism Infrastructure Requirements

Langebaan-Velddrif

Objectives	Investment	Specification	Responsibility
<u>Road</u>	<ul style="list-style-type: none"> ■ Cape Town to Langebaan (R27) 	<ul style="list-style-type: none"> ■ Maintain to acceptable standard 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT: Transport Branch
<u>Information and amenities</u>	<ul style="list-style-type: none"> ■ Langebaan ■ Velddrif ■ Paternoster 	<ul style="list-style-type: none"> ■ Tourism Information Centre aimed at promoting West Coast coastal region and creating linkages with Cederberg Gateway ■ Arts and Crafts training ■ Tour operations ■ Craft market 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT: Transport Branch ■ West Coast District Council ■ West Coast Small Business Centre
	<ul style="list-style-type: none"> ■ Signage 	<ul style="list-style-type: none"> ■ Visible and consistent signage system directing and focusing traffic flows along route and linking other destinations 	<ul style="list-style-type: none"> ■ Western Cape Tourism ■ DEAT ■ Provincial Department of Public Works and Roads ■ Private sector ■ Transitional Local Council
<u>Public transport</u>	<ul style="list-style-type: none"> ■ Cape Town - Langebaan 	<ul style="list-style-type: none"> ■ Provision of clean, regular train service – particular emphasis on usage by Cape Metro and provincial market 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ National DEAT ■ Spoornet

Tourism Infrastructure Investment Framework

Tourism Infrastructure Requirements

Overstrand

Objectives	Investment	Specification	Responsibility
<u>Road</u>	<ul style="list-style-type: none"> ■ Hermanus to Stanford 	<ul style="list-style-type: none"> ■ upgrade and repair road 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT: Transport Branch ■ Overstrand District Council
<u>Information and amenities</u>	<ul style="list-style-type: none"> ■ Rooi Els ■ Betty's Bay ■ Hangklip-Kleinmond ■ Fisherhaven ■ Hawston ■ Onrus ■ Vermont ■ Hermanus ■ Stanford ■ Gansbaai ■ Pearly Beach 	<ul style="list-style-type: none"> ■ Food and beverage ■ Retail ■ Toilets ■ Landscaping – beaches, picnic areas, town squares, boardwalks ■ Coastal interpretive signage ■ Business skills training ■ Tour operations ■ Security points ■ Tourism information points 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAT: Marine and Coastal Management ■ Overstrand District Council ■ Local authorities ■ Private sector ■ SAPS
	<ul style="list-style-type: none"> ■ Signage 	<ul style="list-style-type: none"> ■ Linkages between key attractions and themed routes in the area to create critical mass and enhance awareness 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT: Transport Branch ■ Overstrand District Council ■ Local authorities

Tourism Infrastructure Investment Framework

Tourism Infrastructure Requirements

Cape Agulhas

Objectives	Investment	Specification	Responsibility
<u>Road</u>	<ul style="list-style-type: none"> ■ Gansbaai to Struisbaai 	<ul style="list-style-type: none"> ■ Upgrade gravel road to improve driving conditions - short term priority ■ Investigate tarring of road to accommodate tour coaches – medium term priority 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT: Transport Branch ■ DBSA ■ National Parks Board ■ Cape Nature Conservation Board ■ Private sector
<u>Information and amenities</u>	<ul style="list-style-type: none"> ■ Cape Agulhas 	<ul style="list-style-type: none"> ■ Tourism Information Centre ■ Food and beverage ■ Retail ■ Toilets ■ Craft market ■ Improve walkway to southern-most point 	<ul style="list-style-type: none"> ■ DEEAT ■ Western Cape Tourism ■ National Parks Board ■ Cape Nature Conservation Board ■ Private sector
	<ul style="list-style-type: none"> ■ Signage 	<ul style="list-style-type: none"> ■ Concentrating and dispersing tourism flows on the basis of destination strengths. Creation of linkages between other attractions (e.g. De Hoop Nature Reserve, Malgas Pont, Arniston, Elim) ■ Signage system linking lighthouse to southern-most point 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT: Transport Branch ■ Local authorities ■ National Parks Board ■ Cape Nature Conservation Board ■ Private sector
<u>Forward planning</u>	<ul style="list-style-type: none"> ■ Integrated tourism framework 	<ul style="list-style-type: none"> ■ Tourism development framework for TDA comprising Cape Agulhas, Struisbaai, Elim, Arniston and De Hoop Nature Reserve 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ Local authorities ■ National Parks Board ■ Cape Nature Conservation Board ■ DBSA

Tourism Infrastructure Investment Framework

Tourism Infrastructure Requirements

Mossel Bay-George-Oudtshoorn

Objectives	Investment	Specification	Responsibility
<u>Air</u>	<ul style="list-style-type: none"> ■ George 	<ul style="list-style-type: none"> ■ Upgrade airport infrastructure 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ ACSA
<u>Road</u>	<ul style="list-style-type: none"> ■ George to Oudtshoorn 	<ul style="list-style-type: none"> ■ Upgrade road sections linking roads to upgraded Outeniqua mountain pass ■ Encourage use of historic mountain passes e.g. Montagu, Swartberg – review provision of interpretive signage, view points 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT: Transport Branch ■ Southern Cape District Council
<u>Public transport</u>	<ul style="list-style-type: none"> ■ Linkages to Cape Town and Port Elizabeth 	<ul style="list-style-type: none"> ■ Regular, modern, clean train and coach services 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ National DEAT ■ Spoornet ■ Private sector
<u>Information and amenities</u>	<ul style="list-style-type: none"> ■ George ■ Mossel Bay ■ Oudtshoorn 	<ul style="list-style-type: none"> ■ Tourism Information Centre ■ SMME Business Skills Training ■ Retail ■ Food and beverage ■ Toilets 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT: Transport Branch ■ Southern Cape District Council ■ Southern Cape Small Business Centre
	<ul style="list-style-type: none"> ■ Signage 	<ul style="list-style-type: none"> ■ Signage system linking George airport to tourist information points and key attractions ■ Concentrating and dispersing tourism flows on the basis of destination strengths. Creation of linkages between other attractions (e.g. Fancourt, Cango Caves, ostrich farms, Dias Museum, historic mountain passes, nature reserves) 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT: Transport Branch ■ Southern Cape District Council ■ Local authorities

Tourism Infrastructure Investment Framework

Tourism Infrastructure Requirements

Cederberg Gateway

Objectives	Investment	Specification	Responsibility
<u>Road</u>	<ul style="list-style-type: none"> ■ N7 – Piketberg to Clanwilliam 	<ul style="list-style-type: none"> ■ Upgrade 50 km section between Piekenierskloof and Clanwilliam 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT: Transport Branch ■ West Coast District Council
<u>Information and amenities</u>	<ul style="list-style-type: none"> ■ Piketberg ■ Clanwilliam ■ Van Rhyndorp 	<ul style="list-style-type: none"> ■ Tourism Information Points ■ Arts and Crafts Training Unit ■ SMME Assistance Unit ■ Retail ■ Food and beverage ■ Toilets 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT: Transport Branch ■ West Coast District Council ■ West Coast Small Business Centre ■ Local authorities
	<ul style="list-style-type: none"> ■ Signage 	<ul style="list-style-type: none"> ■ Tourism Information Point at Piketberg specifically aimed at promoting West Coast interior and far north ■ Tourism Information Point at Clanwilliam promoting agri and rural tourism ■ Concentrating and dispersing tourism flows on the basis of destination strengths. Creation of linkages between other attractions e.g. Cederberg Wilderness Area, Lamberts Bay, Wupperthal, Strandfontein, Papendorp. 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ DEAAT: Transport Branch ■ West Coast District Council ■ Local authorities
<u>Public transport</u>	<ul style="list-style-type: none"> ■ Linkages between Cape Town and Van Rhyndorp 	<ul style="list-style-type: none"> ■ Regular, modern, clean train and coach services 	<ul style="list-style-type: none"> ■ Tourism Chief Directorate ■ National DEAT ■ Spoornet ■ Private sector

Tourism Infrastructure Investment Framework

Tourism Infrastructure Requirements

Eastern Gateway

Objectives	Investment	Specification	Responsibility
<u>Road</u>	<ul style="list-style-type: none"> N2 – Sedgfield to Knysna 	<ul style="list-style-type: none"> Upgrade where appropriate 	<ul style="list-style-type: none"> Tourism Chief Directorate DEAAT: Transport Branch Southern Cape District Council
<u>Information and amenities</u>	<ul style="list-style-type: none"> Stormsriv er/Bloukrans Riv er Knysna 	<ul style="list-style-type: none"> Tourism Information Points Arts and Crafts Training Unit SMME Business Skills Training Retail Food and bev erage Toilets Security points 	<ul style="list-style-type: none"> Tourism Chief Directorate DEAAT: Transport Branch Southern Cape District Council Southern Cape Business Centre Local authorities
	<ul style="list-style-type: none"> Signage 	<ul style="list-style-type: none"> Linkages between key attractions and themed routes to create critical mass 	<ul style="list-style-type: none"> Tourism Chief Directorate DEAAT: Transport Branch Southern Cape District Council Local authorities

Tourism Infrastructure Investment Framework

Tourism Infrastructure Requirements

Beaufort West

Objectives	Investment	Specification	Responsibility
<u>Information and amenities</u>	<ul style="list-style-type: none"> Beaufort West 	<ul style="list-style-type: none"> Karoo Tourgate Arts and Crafts Training SMME Business Skills Training Retail Food and bev erage Toilets 	<ul style="list-style-type: none"> Tourism Chief Directorate DEAAT: Transport Branch Central Karoo District Council National Department of Local authorities
	<ul style="list-style-type: none"> Signage 	<ul style="list-style-type: none"> Directing tourism flows along the N 12 and R62 and dispersal within Beaufort West. Linkages between other attractions e.g. Karoo National Park 	<ul style="list-style-type: none"> Tourism Chief Directorate DEAAT: Transport Branch Southern Cape District Council Local authorities