



Chris Hani District Municipality

Tourism Integrated Plan (39/2007/DPA (MM))

FINAL DRAFT VERSION 1.5

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Contents

- 1 Introduction 11**
 - 1.1 A Functioning Tourism System11
 - 1.2 Methodology12

- 2 Contextual Analysis 14**
 - 2.1 The Study Area14
 - 2.2 Socio-Economic Status of the Chris Hani District.....15
 - 2.3 Integrated Development Planning18
 - 2.4 Regional Economic Development Strategy20
 - 2.5 Policy and Legal Framework for Responsible Tourism25

- 3 Market Analysis 27**
 - 3.1 Tourism Supply27
 - 3.1.1 Tourism Product Elements in the Chris Hani District Municipality27
 - 3.1.2 Tourism Attractions and Activities in the Chris Hani District Municipality.....28
 - 3.1.3 Tourism Accommodation in the Chris Hani District Municipality29
 - 3.2 Tourism Demand in the Chris Hani District Municipality.....33

- 4 Triple Bottom Line Assessment 36**
 - 4.1 Economic Impact of Tourism.....36
 - 4.2 Social Impact of Tourism38
 - 4.3 Environmental Impact of Tourism.....40
 - 4.3.1 Protected Areas.....42

- 5 Focused Assessments and Analysis 44**
 - 5.1 Institutional Assessment44
 - 5.2 Tourist Information Management and Marketing Assessment.....44
 - 5.3 Assessment of Emergency Services and Infrastructure44
 - 5.4 Assessment of Transport Infrastructure46
 - 5.4.1 Communications.....47
 - 5.5 Issues Analysis.....48
 - 5.6 SWOT Analysis49
 - 5.6.1 Strengths.....49
 - 5.6.2 Weaknesses.....50

5.6.3 Opportunities	50
5.6.4 Threats.....	51
6 Tourism Vision and Strategy	52
6.1 Introduction	52
6.2 Tourism Vision	52
6.3 Tourism Mission	53
6.4 Tourism Development Strategy	54
6.4.1 Goals of the Strategy	54
6.4.2 Definition of the Product.....	55
6.4.3 Target Market Segments and Constraints.....	55
6.4.4 Product Development Strategy	57
6.4.5 Product Marketing Strategy.....	57
6.4.6 Benchmarks	58
6.5 Tourism Institutional Framework	63
6.5.1 Background	63
6.5.2 Developing an effective Visitor Information Network.....	64
6.5.3 Proposed Tourism Institutional Framework Model for the Chris Hani District	65
6.5.4 Application of the Proposed Tourism Institutional Framework Model for the Chris Hani District.....	67
6.5.5 Internal Structure & Operations of the LTO.....	69
6.5.6 The Board of the LTO	71
6.5.7 Resource Requirements for the LTO	74
6.5.8 Internal Structure, Operations and Resource Requirements for the DTO.....	77
7 Tourism Spatial Development Plan.....	80
7.1 Purpose of the Tourism Spatial Development Plan	80
7.2 Topography, Biomes, and Conservation Areas.....	80
7.3 Current Tourism Environment	80
7.4 Proposed Tourism Environment.....	90
8 Tourism Development Plan	91
8.1 Tourism Product Development	91
8.2 Human Resource and SMME Development.....	92
8.2.1 Tourism Learnership Project (TLP)	93
8.3 Marketing Plan	94
8.3.1 Destination Marketing.....	94
8.3.2 Overall Marketing Strategy.....	98
8.3.3 Marketing Identity	98

8.3.4 Target Markets.....	99
8.3.5 The Marketing Mix.....	100
8.3.6 Marketing Budget.....	103
8.3.7 Marketing Tools	104
<hr/>	
9 Implementation Plan.....	107
9.1	107
9.2	107
<hr/>	
10 References / Bibliography.....	108
10.1 Bibliography.....	108
10.2 Websites.....	108
<hr/>	
Appendix 1 – Acronyms, Marketing Terms, Tourism Definitions, TGCSA Definitions	109
Appendix 2 – Health Facilities in the Chris Hani District Municipality.....	117
Appendix 3 – Nature-Based Tourism Elements in the Chris Hani District	119
Appendix 4 – Heritage-Based Tourism Elements in the Chris Hani District ..	121
Appendix 5 – Tourist Attractions / Activities in the Chris Hani District	123
Appendix 6 – Database of Tourism Products in the Chris Hani District Municipality	130
Appendix 7 – Economic Model of the Impact of Tourism in the Chris Hani District Municipality	142
Appendix 8 – Protected Areas in the Chris Hani District.....	147
Appendix 9 – SWOT Analyses of each of the Local Municipalities in the Chris Hani District	148
Appendix 10 – Constructing & Marketing an Air-Inclusive Tour Program	170
Appendix 11 – LSM Group Definitions.....	171
Appendix 12 – Key Tourism Organisations and Trade Associations in South Africa	173

Appendix 13 – Sources of Funding for Tourism Businesses 174

Appendix 14 – Register of Workshops and Meetings Held with Roleplayers in the Study Area During the Project 175

Appendix 15 Meetings Held with Roleplayers in the Study Area During the Project 176

List of Figures

- Figure 1: Schematic of a functioning tourism system.11
- Figure 2: Environmental influences on the tourism system. All these elements need to operate correctly for the tourism system to operate optimally.....12
- Figure 3: The Chris Hani District Municipality is located in the north-eastern part of the Eastern Cape Province.14
- Figure 4: The current (2008) Municipal boundaries in the Chris Hani District Municipality (Source: Municipal Demarcation Board).15
- Figure 5: The overall population breakdown by Municipality in the Chris Hani District Municipality. (Source: Stats SA, 2007 Community Survey).....15
- Figure 6: The total population breakdown by race in the Chris Hani District Municipality. (Source: Stats SA, 2007 Community Survey).16
- Figure 7: The age profile of the population in Chris Hani. (Source: Stats SA, 2007 Community Survey).....16
- Figure 8: The age profile of the population in the Chris Hani District, compared to the age profile of the entire South Africa population. (Source: Stats SA, 2007 Community Survey).17
- Figure 9: The educational levels attained by the residents in the Chris Hani District Municipality. (Source: Stats SA, Community Survey 2007).17
- Figure 10: Industry in which individuals (ages 15 to 65) are employed in the Chris Hani District Municipality. (Source: Stats SA, 2007 Community Survey).....18
- Figure 11: The profile of household incomes in the Chris Hani District Municipality and Eastern Cape. (Source: Stats SA, Census 2001).18
- Figure 12: The geographic corridors of economic development and the development nodes identified in the Chris Hani District Municipality Regional Economic Development Strategy. (Source: CHDM REDS, 2008).....22
- Figure 13: Analysis of the tourist accommodation establishments and beds inventory in the Chris Hani District, by category of accommodation defined by the TGCSA.31
- Figure 14: Analysis of the proportion of the total tourist accommodation establishments and beds inventory in the Chris Hani District in each of the categories defined by the TGCSA.32
- Figure 15: Analysis of the relative share of the tourist accommodation establishments and beds inventory in the Chris Hani District in each of the Local Municipalities, and the average number of beds in each establishment. Municipalities where the balance lies above the center line have on average a larger proportion of the beds than establishments, and Municipalities where the balance lies below the center line have on average a smaller proportion of beds than establishments. The average number of beds per establishment in each Local Municipality and the Chris Hani District is indicated by the numbers on the bars.33
- Figure 16: The institutional relationships between the national, provincial, district and local levels in the tourism industry in South Africa.64
- Figure 17: The proposed Tourism Institutional Framework Model for the Chris Hani District.....65
- Figure 18: The proposed tourism institutional framework for the Chris Hani District, after applying the model described in Section 6.5.3.68
- Figure 19: The general structure of successful LTOs.....69

Figure 20: The key elements of the structure of a successful LTO focus on the core business of the organization to drive its strategy and achieve its strategic objectives.70

Figure 21: The Tourism Pyramid, illustrating the application of the four “P’s” of marketing in the tourism industry.70

Figure 22: The internal market segments for the LTO, defined by the interactions with stakeholders required in order to achieve its strategic objective.....71

Figure 23: The South African tourism landscape.....72

Figure 24: Example of the segmentation of the potential funding market for LTOs.77

Figure 25: The main topographical features of the Chris Hani District Municipality.....84

Figure 26: The biomes in the Chris Hani District Municipality.....85

Figure 27: The protected areas in the Hani District Municipality.....86

Figure 28: The current tourism environment with points of interest in the Chris Hani District Municipality.....87

Figure 29: The current tourism environment indicating the areas of interest in the Chris Hani District Municipality.....88

Figure 30: The proposed tourism environment in the Chris Hani District Municipality.89

Figure 31: Typical distribution system of a manufacturer of a tangible product.....95

Figure 32: The tourism distribution system.96

Figure 33: The distribution chain for international tourists to local product owners.97

List of Tables

Table 1: The economic assets for tourism identified during the development of the Regional Economic Development Strategy for the CHDM in 2008.	23
Table 2: The perceived economic opportunities for tourism identified during the development of the Regional Economic Development Strategy for the CHDM in 2008	23
Table 3: The strategic objective and key interventions in tourism for the CHDM LED Unit, derived from the CHDM Growth and Development Summit and the CHDM REDS.	24
Table 4: Summary of the inventory of nature-based tourism product elements in the Chris Hani area.....	27
Table 5: Summary of the inventory of heritage-based tourism product elements in the Chris Hani area.	28
Table 6: Summary of the inventory of tourism attractions in the Chris Hani area.	29
Table 7: Tourist Accommodation in the Chris Hani District Municipality, as determined from the Tourism Sector Plans for each Local Municipality / primary research in the area, identified by the accommodation categories used by Statistics SA.....	30
Table 8: The average bed occupancies of the different types of accommodation in the Chris Hani District Municipality, and the derived total number of bednights sold per annum for 2007/8. The average bed occupancies are calculated as a weighted average of the bed occupancies in each Local Municipality.	34
Table 9: The estimated annual tourist volumes visiting the Chris Hani District Municipality, including local and foreign and VFR and non-VFR visitors. These estimates are calculated from the bednights sold, the approximate profile of visitors to the Chris Hani area, and using Tourism SA statistics for percentages of tourists which are VFR.....	34
Table 10: The projected economic contribution of tourism to the Chris Hani District Municipality for the forecast period 2009 to 2016. Data is calculated using the model included in Appendix 4. Key parameters which are calculated include the total direct expenditure by tourists, the total contribution of the tourism economy, the total economic activity generated by tourism, net contribution by the tourism industry to jobs, the total contribution of the tourism economy (including the tourism industry) to jobs, and the net contribution to SMME creation.	37
Table 11: Summary of the inventory of protected areas in the Chris Hani area.....	43
Table 12: Number of health facilities in the Chris Hani District Municipality.	45
Table 13: Police Stations in the Chris Hani District Municipality.....	45
Table 14: Analysis of the common elements of the Tourism Vision Statements of the Local Municipalities in the Chris Hani District.	53
Table 15: Chris Hani – Domestic Tourism Product-Market fit.	56
Table 16: Chris Hani – Overseas Tourism Product-Market fit.	57
Table 17: Chris Hani bednights compared to 2005 Provincial & National statistics.....	60
Table 18: The average length of stay by domestic and foreign holiday tourists in the Eastern Cape and in South Africa in 2005.....	60
Table 19: The average spend per day for foreign tourists in South Africa, by purpose of visit.....	61

Table 20: The average spend per trip for foreign tourists in South Africa, by category of expense.....	61
Table 21: Estimated occupancy rates in tourism accommodation in the Chris Hani District Municipality. The average room occupancy rates in South Africa for the 13-month period December 2005 to December 2006 are shown for comparison (Source: Stats SA December 2006 Accommodation Occupancy Statistics).	62
Table 22: The estimated number of employers and employees in the tourism industry in South Africa in 2000.....	62
Table 23: The Tourism BEE Scorecard, showing the 2006 national baseline degree of compliance of small tourism enterprises (turnover < R5 million) with the 2009 targets.	63
Table 24: The composition of the Management Board of the Tourism Business Council of South Africa, illustrating the mix of skills and industries required to ensure successful operation and representation.	73
Table 25: Key non-governmental tourism organizations in South Africa, representing the interests of their member sectors.	73
Table 26: Example operating budget for an LTO for a period of 3 years. Some of these amounts may be scaled depending on the overall size of the LTO. For example, salaries & wages expenses depends on the number of staff.	75
Table 27: The tourism products identified by the project and marked on the spatial plan of the current tourism environment in Figure 28. The ID number refers to the identification number on the spatial plan. Full details of the products are provided in Appendix 6.	83
Table 28: Important strategic tourism marketing actions, prioritized for implementation, depending on the current stage of development of the marketing programme.	98
Table 29: The potential tourism market segments for the Chris Hani area, ranked by priority. Note that an entry of "1" in the column headed "5" indicates the first priority item (1) of the high priority items (5).	100
Table 30: Key elements of the marketing mix for the Chris Hani tourism area, ranked in order of priority. Note that an entry of "1" in the column headed "5" indicates the first priority item (1) of the high priority items (5).	102
Table 31: Typical elements of the destination marketing budget.	103
Table 32: Print media selection according to circulation and cost.....	106
Table 33: The Tourism Action Plan for the Chris Hani Tourism Organisation.....	107

Note

The opinions and recommendations contained in this report are based on the information that was available to the Project Team at the time of the research. The estimates and projections included in this report are not presented as results or outcomes that are inevitable under any circumstances, but are, instead, subject to the various assumptions and bases stated in the report.

It is strongly recommended that all data and strategic plans and actions be reviewed and updated periodically (at least annually) to take account of changing market and social conditions, and the effects of the implementation of the strategies.

1 Introduction

The objective of the Tourism Integrated Plan is to provide guidelines and make recommendations to enable the Chris Hani District Municipality to develop a functioning tourism system through the application of a defined strategy and specific actions.

1.1 A Functioning Tourism System

Tourism is an inter-related system of supply and demand factors (the tourism market), and a broad range of societal / environmental influences. Together, these comprise the tourism system.

The tourism market is composed of both supply (an industry) and demand (an activity). These are linked through marketing, research, distribution, global and national tourism organisations and transportation. The inter-relation of elements in the tourism market is shown schematically in Figure 1.

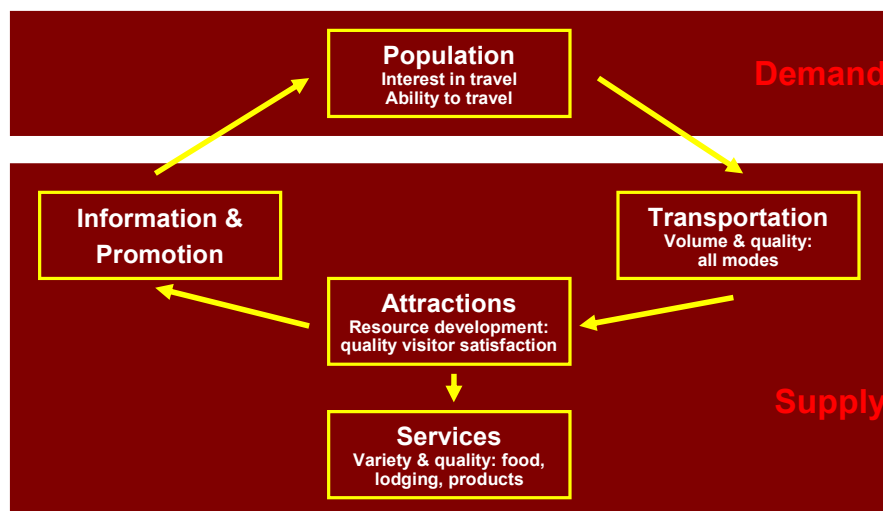


Figure 1: Schematic of a functioning tourism system.

- The supply side of tourism focuses on the most fundamental resources that attract tourists to regions and what the tourism industry brings to the tourist: the natural and cultural resources.
- The demand side of tourism comprises those needs and motivations that drive individuals to become tourists.

- The tourism distribution system focuses on distributing tourism from the tourism sectors to the potential tourist. Tourism distribution can therefore be defined as the extension of the number of points of sale or access away from the location at which the services are performed.

The overall environment in which tourism operates affects supply and demand because it reflects historical, current and future legislative, technological, social and economic trends. This is shown schematically in Figure 2.

In a functioning tourism system, these market and environmental elements all operate correctly and are inter-related.

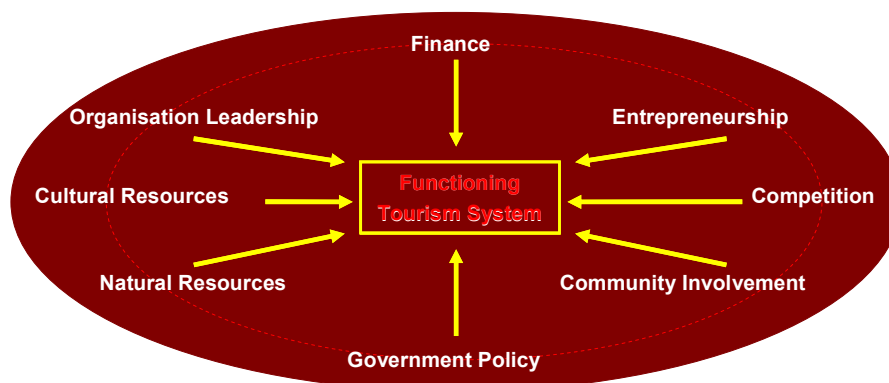


Figure 2: Environmental influences on the tourism system. All these elements need to operate correctly for the tourism system to operate optimally.

1.2 Methodology

The process followed in the compiling of the Tourism Integrated Plan (TIP) has four principal stages, as described in the following sections.

- Stage One: Contextual and Situational Analysis - Policy and Legal Framework for Responsible Tourism, Contextual Analysis of the Chris Hani District Municipality, Analysis of Tourism Demand in Chris Hani District Municipality, Inventory and Analysis of Tourism Supply in the Chris Hani District Municipality, Triple – Bottom-Line Assessment, Institutional Assessment, Tourist Information Management and Marketing Assessment, Infrastructure and Emergency Services
- Stage Two: Tourism Integrated Plan - Spatial Development Plan, Infrastructure Development Plan and Emergency Services, Product Development Plan / Investment Program, Human Resource and SMME Development Plan, Tourist Information and Marketing Plan, Implementation Plan

- Stage Three: Environmental Assessment - An independent environmental assessment will be undertaken of the Tourism Integrated Plan to ensure the environmental integrity of the plan and its compliance with the relevant environmental legislation. This assessment will also highlight any environmental gateways that must be negotiated for the implementation of the elements of the plan. This is specifically relevant for the development of existing and new tourism products.
- Stage Four: Reporting Phase - Contextual and Situation Assessment, Tourism Integrated Plan (GIS maps of the current tourism offerings and the potential expansion and new developments, GIS-linked database of the tourism offerings, sourced from the Local Municipality TSPs, Integration into the CHDM Information Development System), Environmental Assessment of the Tourism Integrated Plan

2 Contextual Analysis

2.1 The Study Area

The Chris Hani District Municipality is located in the north-eastern sector of the Eastern Cape. It includes one DMA (Mountain Zebra Park) and the following eight Local Municipalities:

- Lukhanji
- Inxuba Yethemba
- Tsolwana
- Inkwanca
- Emalahleni
- Intsika Yethu
- Sakhisizwe
- Engcobo

The total geographical area of the municipality is 36,963.8158 square kilometers.

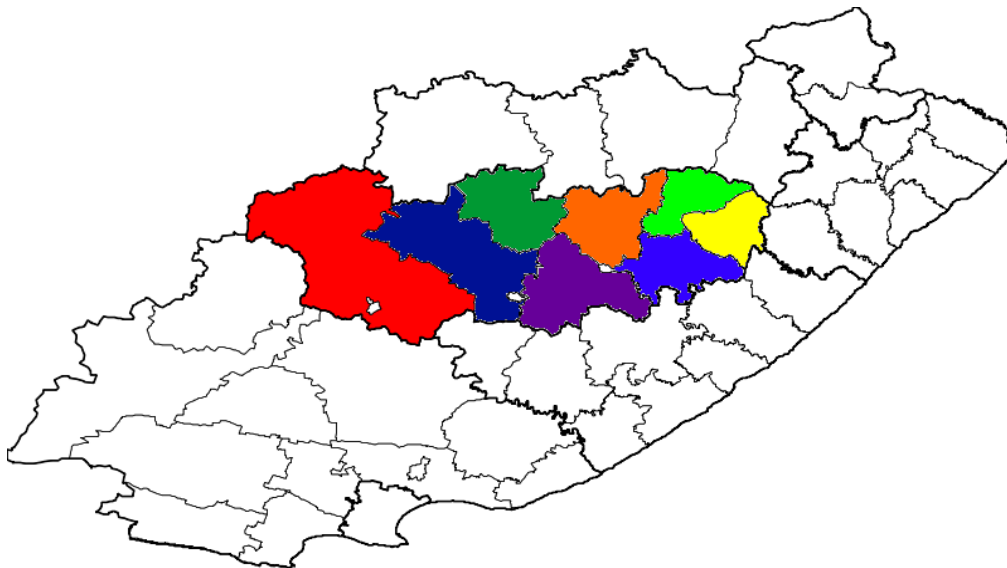


Figure 3: The Chris Hani District Municipality is located in the north-eastern part of the Eastern Cape Province.

2.2 Socio-Economic Status of the Chris Hani District

The most recent population demographics of the Chris Hani area are derived from the 2001 Census by Statistics SA, adjusted to the current municipal boundaries as defined by the Municipal Demarcation Board. All of the Stats SA population and demographic data reported here is drawn from this source.

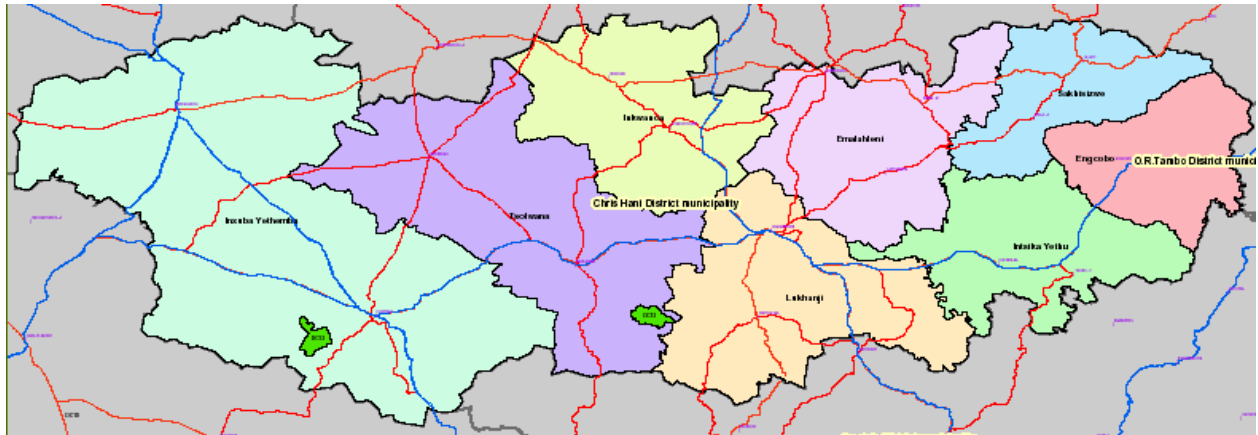


Figure 4: The current (2008) Municipal boundaries in the Chris Hani District Municipality (Source: Municipal Demarcation Board).

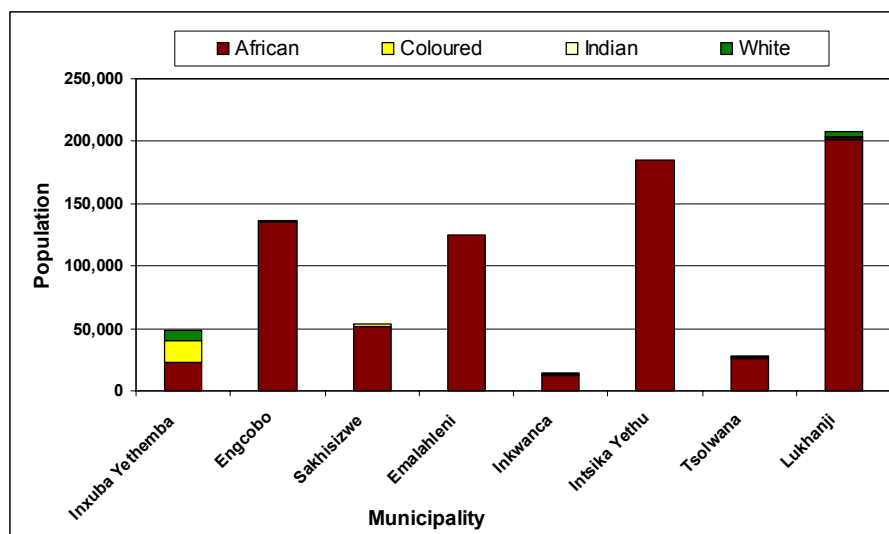


Figure 5: The overall population breakdown by Municipality in the Chris Hani District Municipality. (Source: Stats SA, 2007 Community Survey).

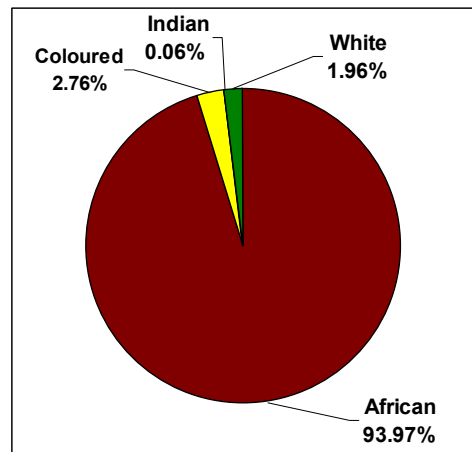


Figure 6: The total population breakdown by race in the Chris Hani District Municipality. (Source: Stats SA, 2007 Community Survey).

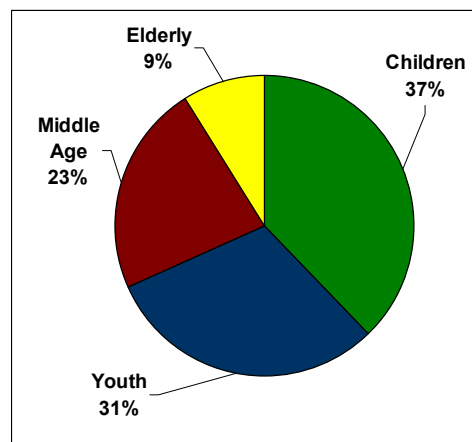


Figure 7: The age profile of the population in Chris Hani. (Source: Stats SA, 2007 Community Survey).

The bulk of the population (63%) in Chris Hani is concentrated in the south-eastern region of the District, in the Lukhanji, Intsika Yethu and Engcobo Local Municipalities. Just more than half of the population is female (51.77%).

The age distribution of the population shows a similar profile to that of the entire South Africa population. In South Africa as a whole, the population shows a weighting to the younger age groups (67.5% below age 34). A similar weighting is observed in the Chris Hani District (68.46% below age 34). The population in the Chris Hani District however shows a significantly lower weighting in the economically active age-group (15 – 64) – only 53.12% in the Chris Hanui District compared to 63.59% in the entire SA population (see Figure 8). This could be attributable to the migration of the economically active elements of the population away from the rural areas towards the more urbanised centers for education and employment.

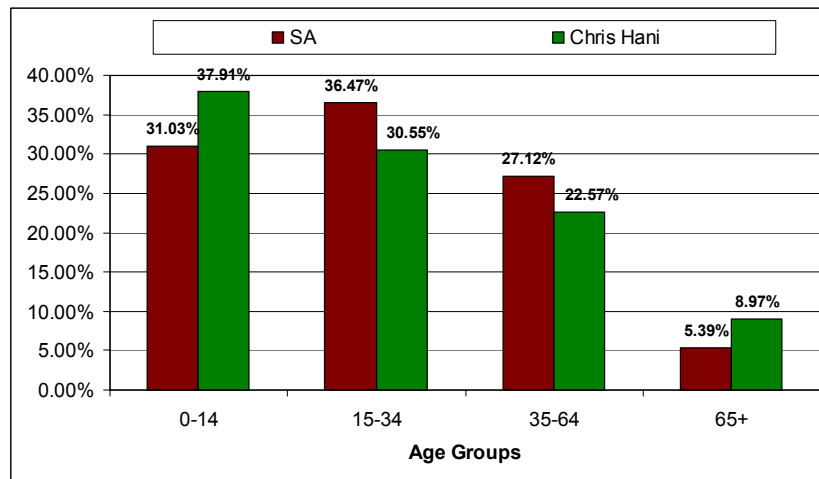


Figure 8: The age profile of the population in the Chris Hani District, compared to the age profile of the entire South Africa population. (Source: Stats SA, 2007 Community Survey).

Of the entire population over 20 in Chris Hani, 50.66% have either no education or only a primary level of education. A further 35.89% have some secondary education (high school). Cumulatively, this means that 86.55% of the population over 20 years have not completed high school. 8.43% of the population have successfully completed high school (Matric) as their highest level of education, and 5.02% have some tertiary qualification. This data is shown graphically in Figure 9.

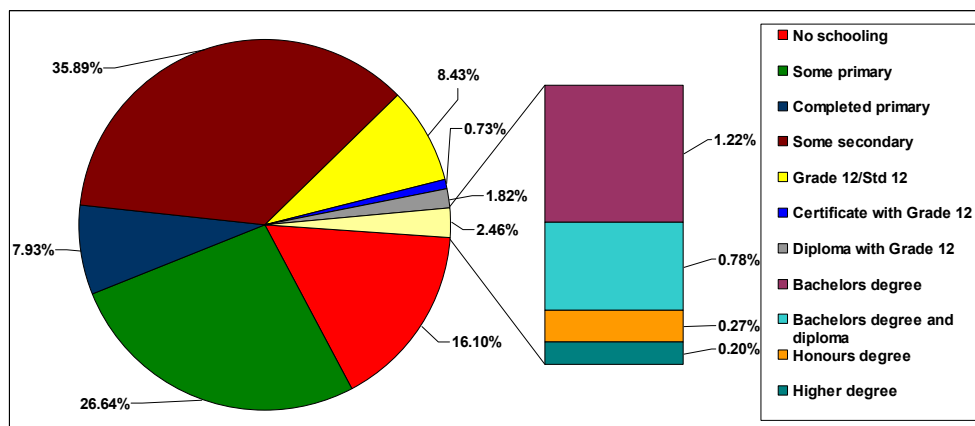


Figure 9: The educational levels attained by the residents in the Chris Hani District Municipality. (Source: Stats SA, Community Survey 2007).

Amongst individuals of employable age (15 to 65 years), the community, social & personal services is the largest employer (25.41%), followed by the Wholesale & Retail Trade (17.13%), Manufacturing (10.21%), Financial, Insurance, Real Estate and Business Services (7.53%) and Construction (6.48%). Combined, these sectors account for nearly 67% of the employment (see Figure 10).

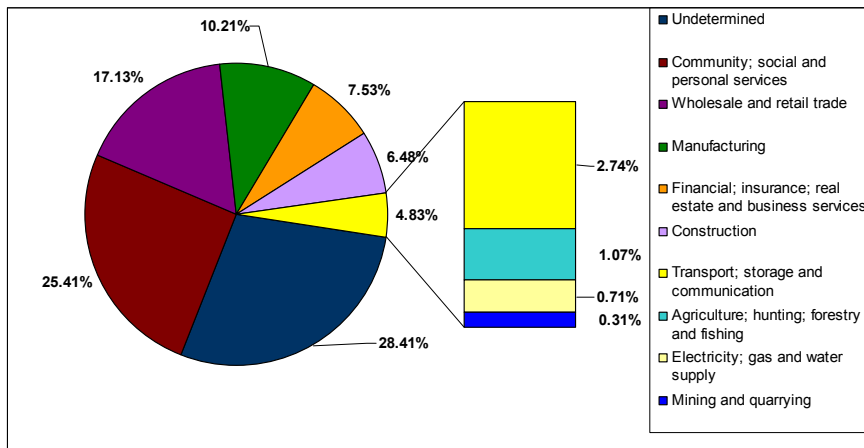


Figure 10: Industry in which individuals (ages 15 to 65) are employed in the Chris Hani District Municipality. (Source: Stats SA, 2007 Community Survey).

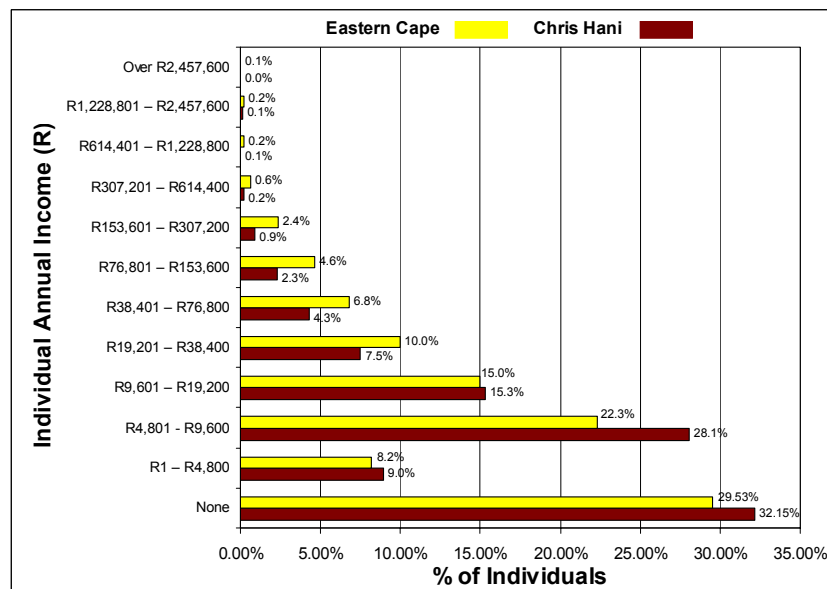


Figure 11: The profile of household incomes in the Chris Hani District Municipality and Eastern Cape. (Source: Stats SA, Census 2001).

2.3 Integrated Development Planning

The development strategies of the Chris Hani District Municipality, as articulated in the 2008/9 IDP, identifies 5 strategic focus areas:

- Institutional transformation
- Infrastructure delivery and services
- Local economic development and poverty alleviation

- Financial management
- Good governance and public participation

Within these focus areas, the following priority needs are identified:

- Local Economic Development
- Poverty alleviation and food security
- Water and sanitation
- Municipal Health and environmental management
- Corporate governance including IGR, monitoring and evaluation and Integrated Planning
- Fire services and Disaster Management
- Special programmes such as youth, women, children, the elderly and people with disabilities
- Transport (regulation of passenger services)

These development strategies are considered in a spatial context based on the objectives defined in the Chris Hani District Spatial Development Framework (SDF):

Sustainable Economic Development, through the various prospects for economic development:

- The development of forestry and maize production in the east.
- Industrial development at Queenstown
- The development of tourism and heritage resources in the west
- The development of irrigation agriculture at Xonxa, Lubisi and Ncora Dams
- The development of local fishing in Emalahleni

Integrated Infrastructure Development, through the development of roads, water and electrical power not only to improve the quality of life of people but to focus on areas identified for economic development in order to kick-start developments in those areas.

Social sustainability, by increasing the access of people to resources, i.e.

- Rural food production
- Management of livestock
- Production of wood
- Fishing along the coast
- Health services, education facilities etc

Environmental sustainability, through careful planning and protection by

- Managing grazing land
- Planning woodlots
- Conserving sensitive areas

Land reform, through reform of the archaic land laws still applicable in Chris Hani District Municipality and by localizing delivery of land reform.

The following spatial development strategies have been defined:

1. An urban renewal strategy for Queenstown to revive it as a major industrial, business and administrative centre.
2. Development and implementation of LED and Agriculture strategies, which will identify land for maize production and provide strategies to manage the development of livestock etc in terms of environmental management procedures.
3. A tourism development strategy for Chris Hani District Municipality.
4. A strategy for the development of coal in Emalahleni.
5. A development strategy for the irrigation schemes at the Xonxa, Lubisi and Ncora Dams.

The IDP process uses the identified priorities and needs to derive objectives, projects and specific actions to drive development in the area.

2.4 Regional Economic Development Strategy

The regional economic development strategy of the Chris Hani District Municipality is documented in the Chris Hani District Municipality Regional Economic Development Strategy (CHDM REDS), dated November 2008.

The basis for the REDS is defined in terms of the understanding of strategy:

Strategy is about positioning the region in such a way as to maximise the economic potential offered by its natural endowments and making choices about where to allocate scarce resources to ensure maximum impact so that the region gets the best possible economic leverage to achieve its economic and social objectives

Sectors within CHDM which are identified as having a relative **comparative advantage** on which to build include:

- Manufacturing
- Mining
- Business tourism
- Leisure tourism
- Retail and business services

Although the broadly defined agriculture sector and the timber production and related value-adding activities are isolated as the sectors which have the most economic development potential in the district, and therefore receive priority focus, the CHDM REDS nevertheless does analyse and provide elements of strategy towards the development of the tourism industry in the CHDM.

The geographic focus of the REDS is on identified geographic corridors and nodes:

- Corridor 1: Queenstown → Cofimvaba → Tsomo → Ngcobo
- Corridor 2: Queenstown → Lady Frere → Cala → Elliot → Indwe → Dordrecht
- Corridor 3: Middelberg → Queenstown → Hofmeyr → Takastad → Cradock
- Corridor 4: Queenstown → Molteno → Sterkstroom → Middelberg

These are shown graphically in Figure 12.

The economic strategy development process identified specific strengths / assets and opportunities for tourism. These are shown in Table 1 and Table 2 respectively.

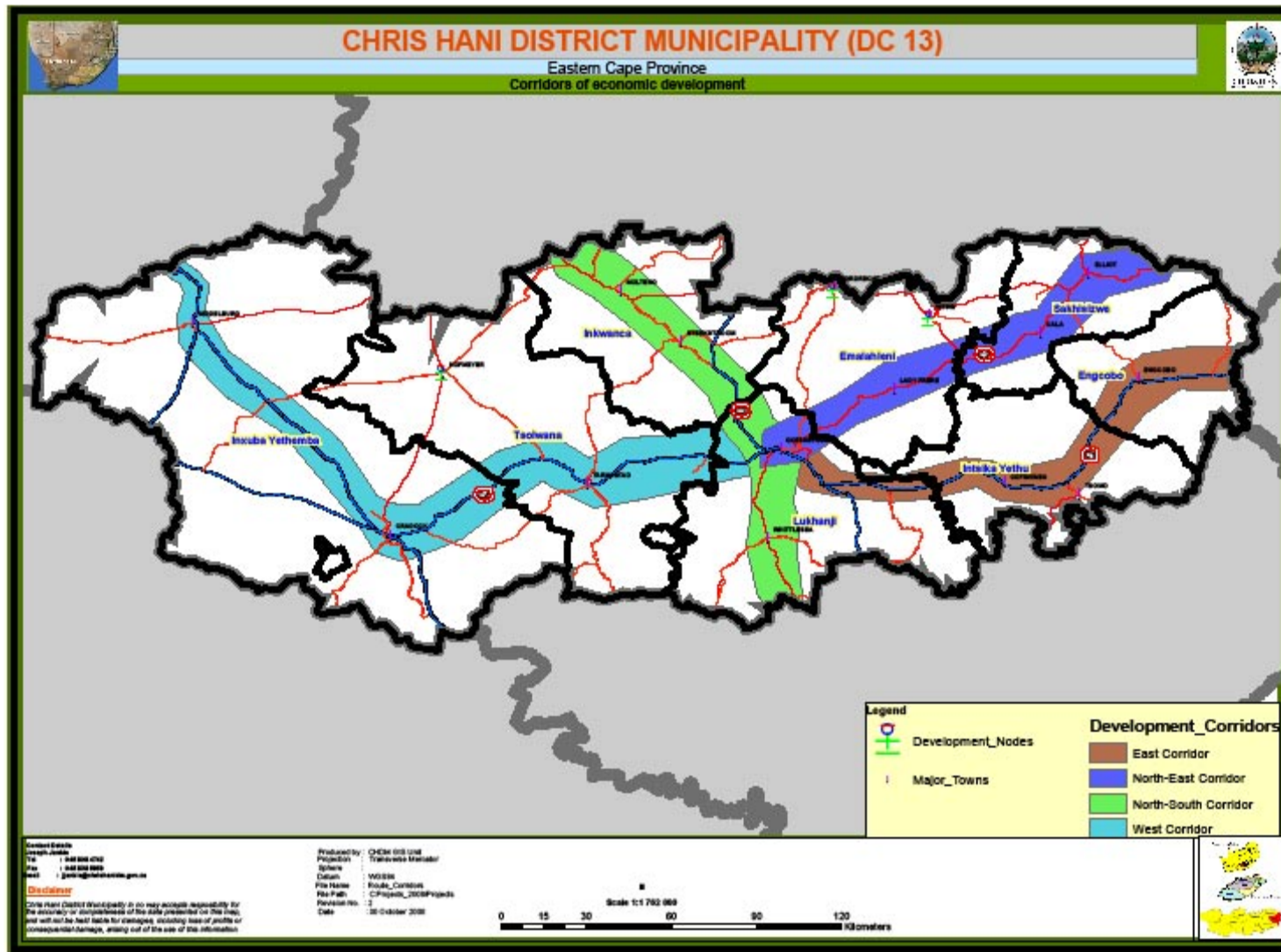


Figure 12: The geographic corridors of economic development and the development nodes identified in the Chris Hani District Municipality Regional Economic Development Strategy. (Source: CHDM REDS, 2008).

IDENTIFIED ECONOMIC ASSETS FOR TOURISM IN THE CHDM	
Broad category	Assets for Tourism and Hospitality
Water and water infrastructure	Dams, rivers, waterfalls / adventure and aqua-culture tourism
Climate and natural beauty	Climate, natural environment / eco-tourism potential /
Economic infrastructure	Accommodation infrastructure
Transport infrastructure and physical location	Existing tourism route / business tourism due to central locality / location on the N6 / easy access
Human resources	Friendly people
Specific existing assets	Established sport events with facilities to explore more sporting event Historical, political liberation and cultural heritage / rock painting / battles sites / well-conserved heritage sites
Potential assets	Game farming tourism / agro- tourism / township tourism / musical jazz and afro-pop / craft linked to local culture

(Source: CHDM REDS, 2008)

Table 1: The economic assets for tourism identified during the development of the Regional Economic Development Strategy for the CHDM in 2008.

PERCEIVED ECONOMIC OPPORTUNITIES FOR TOURISM IN THE CHDM	
Town	Opportunities for Tourism and Hospitality
Queenstown	Five star hotel, / entertainment centre / conference centre / business and sport tourism / gambling accommodation
Cofimvaba	Liberation route / dams for sporting events as tourist attractions
Ngcobo	Liberation heritage sites
Dordrecht	Mountain hiking trails hotel
Indwe	Golf course resort restaurants development of tour guides
Elliot	Dam for picnics / caravan park hiking trails, bird watching, caves (Water Kloof), fishing, cultural village golf course country club, sports fields
Cala	rock paintings restaurant conference facilities hospitality, cultural dances hiking trails tour guides, fishing on Tsomo river
Lady Frere	clay arts and crafts, eco-tourisms, hiking and off road adventures Xonga dam for hiking and water sport tourism meander hospitality and conference centre cultural village, hotel and restaurant, craft centre
Queenstown	Fishing, sport tourism hotels
Middelberg	conference facilities marketing of facilities like b&bs windmill craft production
Takastad	sports bar /tavern for township, b&b facilities in township tour guides Provision of more tourist attractions
Cradock	windmill craft productions natural beauty, provision of more tourist attractions, tour operators and guides, marketing
Molteno	tourist attraction battle fields, develop Molteno dam (picnic sites), spa-paradise (tourism)
Sterkstroom	Hunting tourism catering rock art tourism

(Source: CHDM REDS, 2008)

Table 2: The perceived economic opportunities for tourism identified during the development of the Regional Economic Development Strategy for the CHDM in 2008

The comparative and competitive advantage of the CHDM for tourism is identified in two specific elements:

- **Business tourism:** conferences, week-night accommodation and related services, etc. - predominantly in Queenstown and Cradock.
- **Leisure tourism** – throughout the district, with emphasis on the Liberation Route, heritage tours, adventure tourism and game/nature reserves and game hunting.

It was noted that the business tourism is dominated by government business, and predominates in Queenstown and Cradock. Opportunities in provision of venues, accommodation and related services were noted.

Although it was noted that the Liberation Route and heritage tours are important assets of the CHDM, it was also noted that large investment in product development, the establishment of the necessary infrastructure and related services, and in marketing is required in order to unlock these assets to competitive advantage.

To promote the development of the tourism sector, and optimise the comparative advantages of the sector, the CHDM REDS defines a specific strategic objective and key interventions which the CHDM LED Unit should pursue. The tourism objective and interventions are shown in .

STRATEGIC OBJECTIVE AND INTERVENTIONS FOR TOURISM IN THE CHDM	
Strategic Objective: CHDM is recognised as a tourist destination locally, nationally, and internationally	
Main initiatives from the GDS	Strategic interventions: CHDM LED Unit
Develop a tourist master plan for the District Promote the Great Karroo Gateway Biosphere	Ensure necessary infrastructure and services are in place Allocate resources on the basis of a District wide master plan
Strengthen the Liberation / Heritage route by linking to existing tourist initiatives Establish and strengthen tourist information centres (particularly in Queenstown)	Ensure quality standards Ensure inclusion on integrated tourism development plans in IDPs of local municipalities

(Source: CHDM REDS, 2008)

Table 3: The strategic objective and key interventions in tourism for the CHDM LED Unit, derived from the CHDM Growth and Development Summit and the CHDM REDS.

Overall, the CHDM REDS recommends the adoption of an enabling framework for the development of tourism through the initiatives identified in the Responsible Tourism Sector Plans of the Local Municipalities, and the development of the overall District-level tourism framework through the CHDM Tourism Integrated Plan.

2.5 Policy and Legal Framework for Responsible Tourism

A number of items of legislation and policy documents have relevance to and impact on tourism in South Africa today, including:

Macro Strategies

- Accelerated and Shared Growth Initiative for South Africa (ASGISA)
- Tourism Growth Strategy, (2005 – 2007)
- Domestic Tourism Growth Strategy (2004 - 2007)
- Tourism Investment Mobilisation Strategy for South Africa (2001 – 2011)
- HIV/AIDS Handbook for South African Tourism and Hospitality Companies
- National Tourism Safety & Awareness Strategy

Acts

- National Tourism Act, Act 72 of 1993
- Tourism Amendment Act, Act 8 of 2000
- Tourism Second Amendment Act, Act 70 of 2000
- Eastern Cape Tourism Act, Act 8 of 2003
- Municipal Structures Act, Act 117 of 1998
- Municipal Systems Act, Act 32 of 2000
- Municipal Demarcation Act, Act 27 of 1998
- Municipal Finance Management Act, Act 56 of 2003
- Public Finance Management Act, Act 1 of 1999
- National Environmental Management Act, Act 107 of 1998
- Development Facilitation Act, Act 67 of 1995
- Disaster Management Act, Act 57 of 2002
- National Heritage Resources Act, Act 25 of 1999
- World Heritage Convention Act, Act 49 of 1999
- Spatial Data Infrastructure Act, Act 54 of 2003
- National Sport and Recreation Act, Act 110 of 1998

Policy Documents

- Tourism White Paper, May 1996
- Responsible Tourism Manual for South Africa, July 2002
- Tourism BEE Charter and Scorecard 2005
- Eastern Cape Provincial Growth Development Plan (PGDP) 2003
- Integrated Development Plans (IDPs)

Cognisance of this relevant local legislation is critical in developing and implementing the Tourism Integrated Plan, and taking advantage of the opportunities and complying with the requirements of the Acts and Policies.

3 Market Analysis

3.1 Tourism Supply

3.1.1 Tourism Product Elements in the Chris Hani District Municipality

The tourism product elements that are of specific relevance to the Chris Hani area, namely nature-based and heritage tourism product elements, are described in the following sub-sections.

Foreign tourist's main reasons for visiting South Africa are wildlife, scenic beauty, warm hospitality, business opportunities, culture, heritage and history. Chris Hani has the resources to provide such reasons for visiting the area but these resources need to be developed.

3.1.1.1 Nature-Based Tourism Product Elements

Nature-based tourism product elements are those natural features and nature-based locations which form tourist attractions. A summary of the inventory of nature-based product elements in the Chris Hani District is shown in Table 4 below, and the identification of the product elements is given in Appendix 2.

Nature-Based Tourism Product Elements	
Local Municipality	Number
Inxuba Yethemba	6
Emalahleni	6
Lukhanji	8
Intsika Yethu	1
Inkwanca	9
Tsolwana	37
Sakhisizwe	14
Engcobo	15
TOTAL	96

Table 4: Summary of the inventory of nature-based tourism product elements in the Chris Hani area.

3.1.1.2 Heritage-Based Tourism Product Elements

Heritage-based tourism product elements are those elements of an area which reflect, identify and showcase the history and heritage of the area, specifically with regard to the human history, and which do or can form tourist attractions. A summary of the inventory of heritage-based product

elements in the Chris Hani District is shown in Table 5 below, and the identification of the product elements is given in Appendix 4.

Heritage/History Tourism Product Elements	
Local Municipality	Number
Inxuba Yethemba	34
Emalahleni	8
Lukhanji	21
Intsika Yethu	36
Inkwanca	8
Tsolwana	23
Sakhisizwe	14
Engcobo	28
TOTAL	172

Table 5: Summary of the inventory of heritage-based tourism product elements in the Chris Hani area.

3.1.2 Tourism Attractions and Activities in the Chris Hani District Municipality

Tourist attractions can be divided into four main elements within the destination's environment:

- Natural Attractions
- Built Attractions
- Cultural Attractions
- Social Attractions

The tourist attractions and activities in the Chris Hani District Municipality have been analysed according to these categories. The destination mix should be matched with different tourism markets according to the various product offerings. Generally the greater the mix of attractions the more popular the destination.

A summary of the inventory of tourism attractions in the Chris Hani District is shown in Table 6 below, and the identification of the attractions is given in Appendix 5.

SURVEY OF CHRIS HANI DISTRICT MUNICIPALITY TOURIST ATTRACTIONS / ACTIVITIES				
LOCAL MUNICIPALITY	ELEMENTS			
THINGS TO SEE AND DO	NATURAL	BUILT	CULTURAL	SOCIAL
Inxuba Yethemba	8	63	30	72
Tsolwana	13	6	23	4
Inkwanca	16	6	0	1
Lukhanji	7	19	1	0
Emalahleni	3	7	3	0
Intsika Yethy	0	8	17	14
Sakhisizwe	20	22	5	1
Engcobo	21	12	7	0
TOTAL	88	143	86	92

Table 6: Summary of the inventory of tourism attractions in the Chris Hani area.

3.1.3 Tourism Accommodation in the Chris Hani District Municipality

The Chris Hani District Municipality has a reasonable selection of accommodation available to the visitor. These include country hotels, town-based guest houses and B&Bs, guest farms (farm stays), guest cottages, game farms, lodges and camping / caravan sites. In each type, there is a reasonable selection of different establishments.

The number of accommodation establishments and tourist beds in the Chris Hani District Municipality, divided into these categories, is shown in Table 7.

CHRIS HANI DISTRICT MUNICIPALITY TOURIST ACCOMMODATION									
Accommodation Type	Number of Establishments in Chris Hani								Total Number of Establishments in Chris Hani
	Inxuba Yethamba (March 2008)	Tsolwana (Aug 2007)	Inkwanca (Feb 2009)	Lukhanji (Feb 2009)	Emalahleni (Aug 2008)	Intsika Yethu (July 2008)	Sakhisizwe (Aug 2008)	Engcobo (Aug 2007)	
Backpacker & Hostelling	0	0	0	0	0	0	0	0	0
Bed & Breakfast	8	4	5	32	2	9	6	3	69
Guest houses & Guest farms	30	8	0	18	4	8	0	0	68
Country House	4	0	0	1	0	0	0	0	5
Hotels	2	2	2	1	0	0	2	1	10
Lodge	5	6	0	4	1	0	2	0	18
Self-Catering	9	3	2	9	0	0	2	0	25
Caravan parks and camping sites	6	1	0	0	0	0	2	0	9
TOTAL	64	24	9	65	7	17	14	4	204

Accommodation Type	Number of Beds Chris Hani								Total Number of Beds in Chris Hani
	Inxuba Yethamba (March 2008)	Tsolwana (Aug 2007)	Inkwanca (Feb 2009)	Lukhanji (Feb 2009)	Emalahleni (Aug 2008)	Intsika Yethu (July 2008)	Sakhisizwe (Aug 2008)	Engcobo (Aug 2007)	
Backpacker & Hostelling	0	0	0	0	0	0	0	0	0
Bed & Breakfast	75	25	45	416	23	114	91	30	819
Guest houses & Guest farms	530	188	0	324	57	88	0	0	1,187
Country House	22	0	0	25	0	0	0	0	47
Hotels	103	48	21	64	0	0	49	13	298
Lodge	70	95	0	84	23	0	22	0	294
Self-Catering	155	22	8	137	0	0	10	0	332
Caravan parks and camping sites	422	10	0	0	0	0	0	0	432
TOTAL	1,377	388	74	1,050	103	202	172	43	3,409

(Compiled by Kyle Business Projects)

Table 7: Tourist Accommodation in the Chris Hani District Municipality, as determined from the Tourism Sector Plans for each Local Municipality / primary research in the area, identified by the accommodation categories used by Statistics SA.

The accommodation inventory in the Chris Hani District is analysed in the charts in Figure 13, Figure 14 and Figure 15.

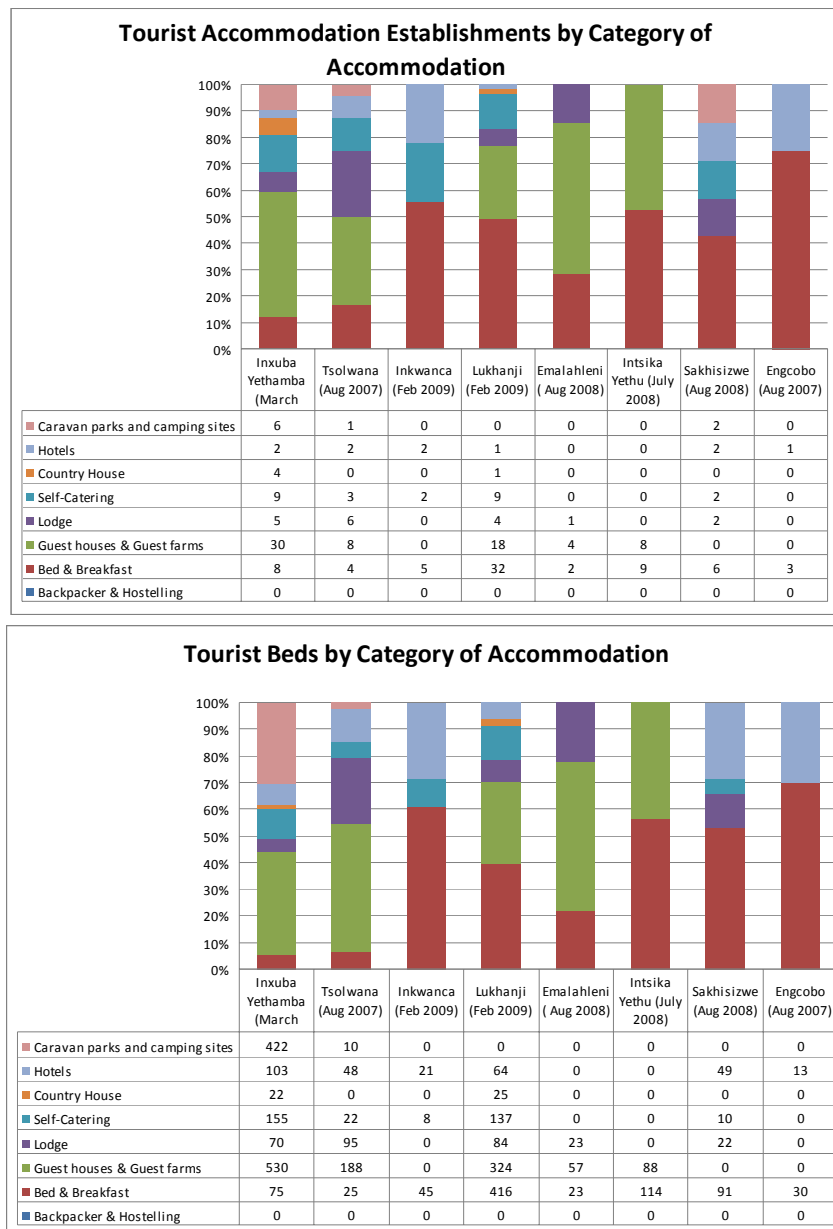


Figure 13: Analysis of the tourist accommodation establishments and beds inventory in the Chris Hani District, by category of accommodation defined by the TGCSA.

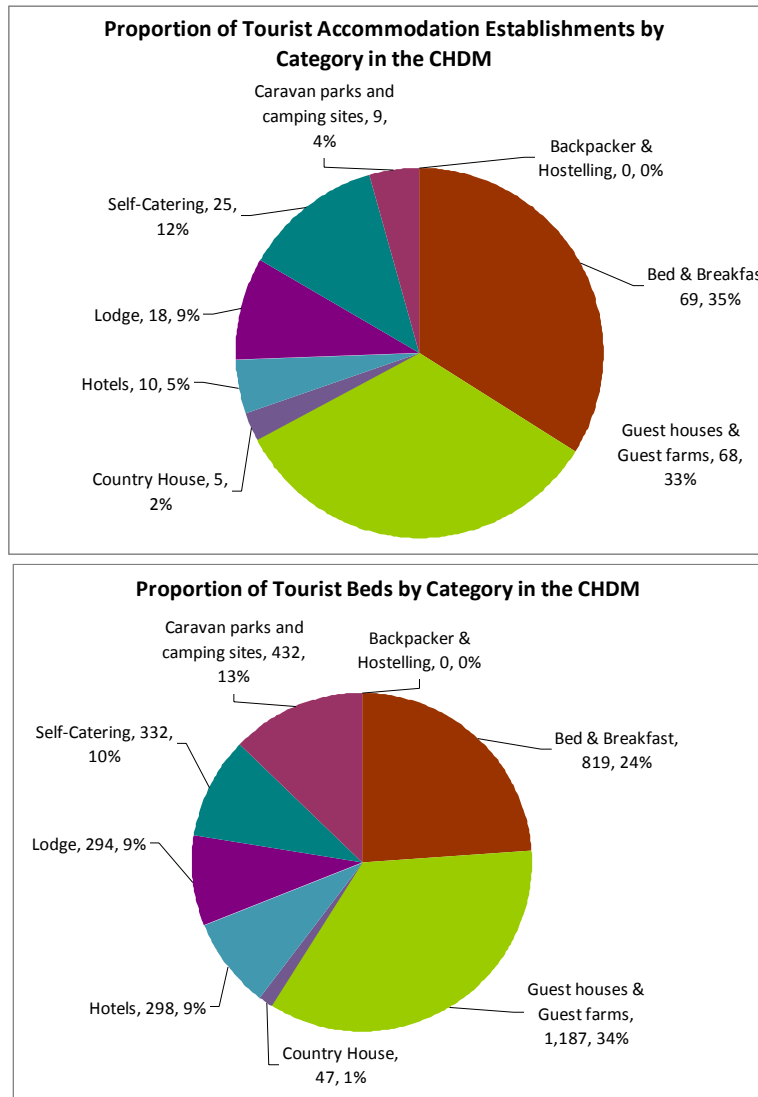


Figure 14: Analysis of the proportion of the total tourist accommodation establishments and beds inventory in the Chris Hani District in each of the categories defined by the TGCSA.

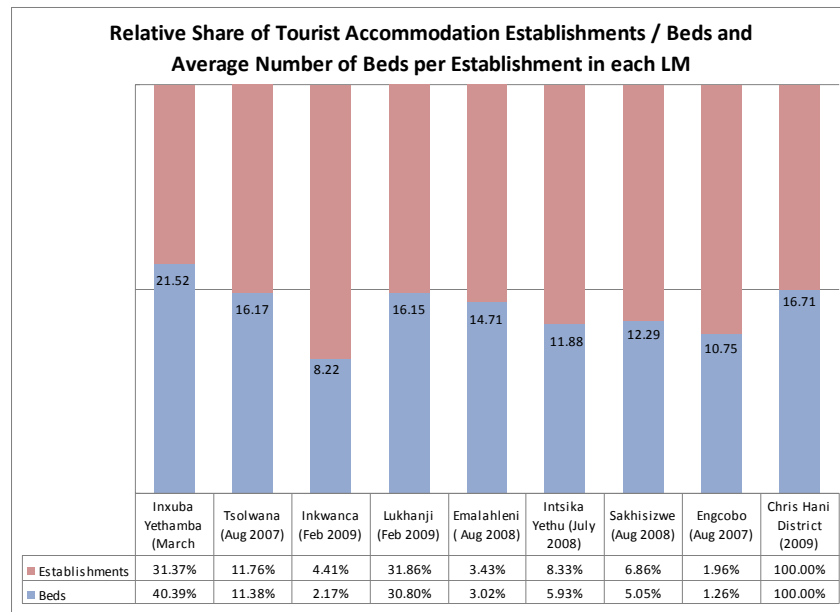


Figure 15: Analysis of the relative share of the tourist accommodation establishments and beds inventory in the Chris Hani District in each of the Local Municipalities, and the average number of beds in each establishment. Municipalities where the balance lies above the center line have on average a larger proportion of the beds than establishments, and Municipalities where the balance lies below the center line have on average a smaller proportion of beds than establishments. The average number of beds per establishment in each Local Municipality and the Chris Hani District is indicated by the numbers on the bars.

3.2 Tourism Demand in the Chris Hani District Municipality

The Chris Hani District Municipality has a total of 204 tourist accommodation establishments, providing 3,409 tourist beds (see Table 7).

Using the total number of beds and the average occupancy of the accommodation aggregated from the individual Tourism Sector Plans, the total number of tourist bednights sold per annum (calculated for the over 2007/8 year) is calculated to be 339,810 (see Table 8), at an overall average bed occupancy of 27.31%.

CHRIS HANI DISTRICT MUNICIPALITY TOURIST ACCOMMODATION OCCUPANCIES & BEDNIGHTS SOLD			
Accommodation Type	Number of Beds in Chris Hani	Average bed occupancy in Chris Hani	Bednights Sold per annum 2007/8
Backpacker & Hostelling	0	0.00%	0
Bed & Breakfast	819	37.79%	112,973
Guest houses & Guest farms	1187	30.60%	132,595
Country House	47	25.32%	4,344
Hotels	298	18.06%	19,640
Lodge	294	17.83%	19,133
Self-Catering	332	23.12%	28,021
Caravan parks and camping sites	432	14.65%	23,105
TOTAL	3,409	27.31%	339,810

(Compiled by Kyle Business Projects)

Table 8: The average bed occupancies of the different types of accommodation in the Chris Hani District Municipality, and the derived total number of bednights sold per annum for 2007/8. The average bed occupancies are calculated as a weighted average of the bed occupancies in each Local Municipality.

The total number of tourist bednights sold per annum is the primary metric currently accepted for the size of the tourism industry and the economic impact of the industry. However, it is also of interest to derive the total number of visitors to the area over the same period, which can be evaluated from further analysis of the data and secondary sources, as this allows an estimate of the size of the VFR demand. The estimated total number of visitors to the Chris Hani District Municipality per annum in 2007/8 is calculated in Table 9.

CHRIS HANI DISTRICT MUNICIPALITY ESTIMATED ANNUAL TOURIST VOLUMES 2007/8	
Total bednights sold	339,810
Bednights sold to foreign tourists (7.97%)	32,690
Bednights sold to local tourists (92.03%)	307,120
Total number of non-VFR tourists	307,727
Total number of non-VFR foreign tourists (ave length of stay 1 night)	32,690
Total number of non-VFR local tourists (ave length of stay 1.12 nights)	275,037
Est Total Number of VFR	984,235
Est Total number of foreign VFR (1.568% of foreign tourists)	521
Est Total number of local VFR (78.15% of local tourists)	983,714
Est Total Visitors	1,291,962
Est Total foreign visitors	33,210
Est Total local visitors	1,258,752
ESTIMATED TOTAL NUMBER OF VISITORS	1,291,962

(Compiled by Kyle Business Projects)

Table 9: The estimated annual tourist volumes visiting the Chris Hani District Municipality, including local and foreign and VFR and non-VFR visitors. These estimates are calculated from the bednights

sold, the approximate profile of visitors to the Chris Hani area, and using Tourism SA statistics for percentages of tourists which are VFR.

4 Triple Bottom Line Assessment

4.1 Economic Impact of Tourism

The economic value of tourism to the Chris Hani area is derived from the direct spend of tourists in the area, and from the jobs supported by tourism.

The direct contribution to GDP is calculated from the total tourist bednights sold in the area. According to the SA Tourism Domestic Tourism Report for 2005 (the most recent available) and the SA Tourism Annual Report for 2007, the average daily spend for domestic and foreign tourists in South Africa are:

- Average spend domestic transit tourists = R146 per day
- Average spend domestic VFR tourists = R94 per day
- Average spend domestic business tourists = R190 per day
- Average spend foreign transit tourists = R620 per day
- Average spend foreign VFR tourists = R400 per day

The projected economic impact of tourism is calculated using the international simulated Tourism Satellite Accounting (TSA) system developed by the World Travel & Tourism Council / Accenture, in conformance with the conceptual structure of the WTO/UN TSA. Current TSA multipliers are calculated from the WTTC / Accenture 2007 Report on South Africa. From this base, the economic impact of tourism in the Chris Hani District Municipality has been calculated over the forecast period 2008 to 2016, and is shown in Table 10. The potential growth of these economic contributions is also calculated, in four scenarios:

1. Expected natural growth in demand – this growth is driven by the anticipated growth in tourism demand in the Eastern Cape (i.e. the baseline);
2. Impact of additional 1% growth in demand;
3. Impact of additional 3% growth in demand;
4. Impact of additional 5% growth in demand.

	2008 Y -1	2009 Y1	2010 Y2	2011 Y3	2012 Y4	2013 Y5	2014 Y6	2015 Y7	2016 Y8	2017 Y9
Total Direct Expenditure by Tourists into the Tourism Industry (Rm)										
Natural Growth	65.335	70.047	75.114	80.563	86.427	92.736	99.528	106.841	114.717	123.202
+ 1%	65.335	70.725	76.575	82.924	89.818	97.305	105.438	114.274	123.878	134.317
+ 3%	65.335	72.082	79.539	87.784	96.900	106.984	118.138	130.481	144.140	159.261
+ 5%	65.335	73.439	82.560	92.830	104.394	117.418	132.090	148.621	167.249	188.246
Total Contribution of the Tourism Economy to the Chris Hani District Municipality GDP (Rm)										
Natural Growth	166.108	178.087	190.969	204.824	219.731	235.773	253.041	271.633	291.657	313.228
+ 1%	166.108	179.812	194.683	210.827	228.354	247.389	268.066	290.531	314.947	341.488
+ 3%	166.108	183.261	202.220	223.181	246.360	271.995	300.355	331.734	366.462	404.904
+ 5%	166.108	186.710	209.901	236.010	265.411	298.525	335.826	377.853	425.214	478.596
Total Economic Activity (Total Demand) Generated by the Tourism Economy (Rm)										
Natural Growth	247.228	265.057	284.230	304.852	327.038	350.915	376.615	404.288	434.090	466.195
+ 1%	247.228	267.624	289.759	313.785	339.872	368.203	398.977	432.414	468.753	508.256
+ 3%	247.228	272.758	300.976	332.174	366.671	404.826	447.035	493.738	545.426	602.642
+ 5%	247.228	277.891	312.408	351.268	395.027	444.311	499.829	562.381	632.871	712.322
Net contribution by the Tourism Industry to employment in the Chris Hani District Municipality (# of jobs)										
Natural Growth	473	476	480	484	487	491	495	500	504	509
+ 1%	473	481	489	498	507	516	525	535	544	555
+ 3%	473	490	508	527	546	567	588	610	633	658
+ 5%	473	499	527	557	589	622	658	695	735	777
Total contribution by the Tourism Economy to employment in the Chris Hani District Municipality (# of jobs)										
Natural Growth	1,078	1,086	1,095	1,104	1,113	1,123	1,133	1,144	1,155	1,166
+ 1%	1,078	1,097	1,116	1,136	1,157	1,179	1,201	1,223	1,247	1,271
+ 3%	1,078	1,118	1,159	1,203	1,248	1,296	1,345	1,397	1,451	1,507
+ 5%	1,078	1,139	1,203	1,272	1,345	1,422	1,504	1,591	1,683	1,781
Net contribution to SMME creation in the Chris Hani District Municipality (# of SMMEs)										
Natural Growth	72	72	73	74	74	75	76	76	77	78
+ 1%	72	73	74	76	77	79	80	82	83	85
+ 3%	72	75	77	80	83	86	90	93	97	100
+ 5%	72	76	80	85	90	95	100	106	112	119

Table 10: The projected economic contribution of tourism to the Chris Hani District Municipality for the forecast period 2009 to 2016. Data is calculated using the model included in Appendix 4. Key parameters which are calculated include the total direct expenditure by tourists, the total contribution of the tourism economy, the total economic activity generated by tourism, net contribution by the tourism industry to jobs, the total contribution of the tourism economy (including the tourism industry) to jobs, and the net contribution to SMME creation.

From the model it is calculated that tourism currently contributes as follows to the local economy of Chris Hani:

- R65.3m in direct tourism spend;
- R166.1m contribution to the GDP by the tourism economy;
- R247.2m total economic activity generated by tourism (i.e. total demand);
- supports 473 jobs in the tourism industry;
- supports a total of 1,078 jobs in the tourism economy (including the tourism industry);
- supports the equivalent of 72 SMMEs in the tourism economy, outside the tourism industry.

In this data, the employment levels are calculated from the total direct tourism spend, and the average direct spend required to support one job – derived from the WTTTC / Accenture TSA data for

2007. This data indicates that in South Africa it requires on average R147,000.00 direct tourism expenditure to create 1 job within the tourism industry, and on average R164,000.00 to create 1 job in the tourism economy. In the Chris Hani District Municipality it is believed that the cost of creating a job could be as much as 40% lower, and so the number of jobs in the tourism industry could be as high as 788, and in the tourism economy about 1,796.

4.2 Social Impact of Tourism

Tourism is only one of many drivers of change in society, and some caution must be used in isolating the cause and effect, and assigning specific effects to tourism.

The positive social impacts of tourism which are currently being experienced or can be expected in the Chris Hani area include:

- Improvement in local living standards due to increased levels of income, derived from jobs and enterprises in the tourism industry;
- Development of the sense of entrepreneurship to take advantage of SMME opportunities in tourism;
- Improvement of local community facilities supported by increased tax revenue derived from tourism developments;
- Improvement in skills levels to satisfy the needs of the tourism industry and economy;
- Improvement of general infrastructure to support tourism, but which also benefits local residents;
- Stimulating new markets for local products;
- Development of new and improved retail, recreation and cultural facilities;
- Improvement in the overall quality of the environment, to provide the attractive, clean and unpolluted environment preferred by tourists;
- Improved conservation of local heritage and resources;
- Improved environmental awareness in the local community;
- Improved sense of cultural identity, reinforced by observing tourists enjoying the local culture and heritage.

Broadly, the negative social impact of tourism can be perceived in the following key areas:

- Morality of the society – drugs, alcoholism, crime, prostitution – These are seldom specifically caused by tourism, but may be exacerbated by it. These are usually driven by the differences in economic status between the tourists and the local residents, and the perception that tourists are a soft and lucrative target.

- Loss of authenticity of traditional products and cultures – Products may be “enhanced” or adapted to make them more appealing / palatable to tourists, which may lead to the loss of elements of the unique cultural identity of the area.
- Language – foreign vocabulary and idiomatic expression may be introduced into the local language, and the use of the local language may be distorted or discouraged even outside the tourism sphere.
- Health – Ailments and diseases may be introduced into an area by tourists, these could include simple ailments such as colds and flu, to more serious diseases such as Asian Flu, Hepatitis, Tuberculosis, and the sexually-transmitted diseases such as HIV and AIDS.
- Economic patterns – Individuals may migrate from the area to cities in search of better economic prospects, the economic differential between members of the community may increase, modified consumption patterns, and changes to the labour force resulting in changes to the roles of individuals in society.

These identified social impacts of tourism can all be expected in the Chris Hani area at some stage in the development of tourism. Specific negative impacts which are currently evident are:

- Crime and prostitution, specifically targeting tourists and at tourist sites;
- Proliferation of begging;
- Over-commercialisation of traditional products;
- Increased economic differentials between members of the community;
- Health impacts, including HIV/ Aids, tuberculosis, general health;
- Declining mental Health;
- Lack of training;
- Lack of benefits for local people;
- Lack of transformation of tourism;
- Seasonal employment

The social impacts of tourism may be managed by reinforcing the positive social impacts, while mitigating the potential negative impacts. This can be achieved by expanding the community involvement in tourism – residents must understand how tourism works, participate in decision-making on tourism planning, development and management, and have the opportunity to receive the benefits from tourism. Tourism should also be developed on a scale and at a rate which is appropriate for the local community to adapt to it, to allow for the early identification of negative impacts and application of remedial measures.

The Local Municipality can also take specific measures to reinforce positive impacts and mitigate negative impacts by for example:

- Educate residents about tourism through public awareness programs, increasing awareness of the positive benefits of tourism to the community;
- Educate tourists about local customs and expected behaviour. This could include an official guide to behaviour which specifically discourages tourists engaging with local residents who are undertaking undesirable activities (for example prostitution, roving street hawkers, beggars etc), and identifies potential problem areas for crime.
- Establish strong linkages between tourism and the other economic sectors in the area;
- Develop and encourage local employment in and ownership and management of tourism enterprises;
- Provide inexpensive or subsidized accommodation and recreation facilities for use by local residents;
- Ensure that local residents have affordable access to their local tourist attractions, through free access for residents on certain days, and free access to youth and elderly groups;
- Control the badgering of tourists by local vendors and hawkers, by establishing serviced craft and goods markets at designated locations;
- Engaging with the SAPS to ensure the strict enforcement of laws on drugs, prostitution and crime.

4.3 Environmental Impact of Tourism

Many features of the natural and built environment are attractions for tourists, and their use for tourism can contribute to the protection of the environment. The overall quality of the environment is important to both residents and tourists, and so well-planned and managed tourism development is required to generate positive environmental impacts. These positive impacts can include:

- The cost of conservation of natural areas and features can be justified on the basis of their value to tourism;
- Improvement in the overall environmental quality and attractiveness of the area, as this attracts tourists;
- Increases the overall environmental awareness and sensitivity of the local residents.

Specific negative impacts on the environment which are observed or anticipated in the Chris Hani Area include:

- Potential pollution of water resources and ground water through inadequate capacity in sewerage treatment or access to water-borne sewerage;
- Pollution of watercourses and degradation of the riverine environment through illegal dumping along river banks;

- Visual pollution and unattractive landscapes and townscapes. This is mainly due to unattractive and excessive signage;
- Littering and vandalism;
- Degradation of the built environment in towns through lack of public toilet facilities and uncontrolled access by vagrants and street hawkers;
- Destruction of the built heritage of the area through poor planning and control of the development process.

These impacts are not currently specifically caused by tourism, but certainly have a negative impact on tourism and the development of the tourism potential of the area.

The Chris Hani District Environmental Management Plan (EMP) highlights areas of the environment which should be conserved and protected. Animal and vegetation species and cover are mapped and identified. Present and future environmental problems, and renewable resources are identified in each Local Municipality. The EMP identifies the following objectives and strategies.

- 1) Ensure clear delegation of responsibilities, consistency of functions in departments and ensure clear reporting and communication channels.
 - a) undertake an institutional structure audit and develop organograms for each LM and the DM to allocate and align responsibilities of departments
 - b) employ an environmental manager
- 2) Promote environmental awareness and build capacity
 - a) develop an environmental awareness and capacity building strategy
 - b) conduct broad environmental training for DM and LM personnel and Councillors
- 3) Ensure that all projects consider environmental issues and EIA's performed where appropriate
- 4) Ensure environmental reserve flow requirements are considered in any water supply projects
- 5) Promote environmental awareness in LM IDP process
- 6) Ensure land use planning considers environmental sensitivity and other constraints
- 7) Promote legal and regulatory compliance
 - a) employ a dedicated Environmental Manager
 - b) implement an environmental management system (EMS)
- 8) Improve water and effluent monitoring
 - a) develop programme for monitoring water resources and effluent discharges
- 9) Promote environmental conservation
 - a) effectively manage existing and identify new conservation areas
- 10) Promote better use and management of commonage and other land
 - a) develop a land use and management plan
 - b) implement and environmental management system (EMS)

- 11) Eradicate invasive alien species
 - a) develop invasive species management plan
- 12) Promote wetland protection
 - a) map wetlands and develop a wetland management plan
- 13) Promote more effective pollution monitoring and response
 - a) develop pollution monitoring and response plan as part of a Disaster Management Plan
- 14) Promote awareness and conservation of heritage sites
 - a) develop heritage site management and awareness plan
- 15) Implement by-laws where deemed appropriate
 - a) identify areas where by-laws are needed for environmental management
- 16) Ensure compliance with air quality legislation
 - a) appoint an air quality officer to coordinate matters relating to air quality management in the municipality
 - b) prepare an Air Quality Management Plan in its IDP
- 17) Promote game farming and eco-tourism opportunities
 - a) commission a feasibility study into further expanding game farming and eco-tourism projects
- 18) Water use management
 - a) undertake a thorough assessment of the water demand

These objectives and strategies, although mostly not aimed specifically at tourism, will if pursued have the effect of improving the overall environment in Chris Hani, making the area more attractive for tourists as well as for residents.

4.3.1 Protected Areas

The primary protected areas in the Chris Hani District Municipality include local nature reserves and parks, Provincial nature reserves, and National parks. Many of the areas identified constitute the surroundings of water reservoirs and dams. The inventory of protected areas is summarized in Table 11, and the details are contained in Appendix 8.

Protected Areas	
Local Municipality	Number
Inxuba Yethemba	2
Emalahleni	9
Lukhanji	3
Intsika Yethu	1
Inkwanca	3
Tsolwana	21
Sakhisizwe	12
Engcobo	12
TOTAL	63

Table 11: Summary of the inventory of protected areas in the Chris Hani area.

5 Focused Assessments and Analysis

5.1 Institutional Assessment

The Chris Hani DTO is organized around a Tourist Information Office in Queenstown.

Ideally, an institutional arrangement with a small staff complement should allow for the implementation of the core functions of a fully-fledged destination marketing organisation (DMO), namely:

- Facilitator
- Initiator
- Matchmaker
- Communicator

The Chris Hani DTO's capacity to progress much beyond the core functions of facilitator and communicator to include the functions of matchmaker and initiator will depend on human resource capacity and the relevant skills for such tasks as tourism development, inward investment, project development, partnership development, special event and conference development.

5.2 Tourist Information Management and Marketing Assessment

Management of tourist information and marketing in the Chris Hani District Municipality is handled in a distributed manner, with individual LTO / Tourism Association structures in the LMs undertaking limited individual marketing of the activities within their own area / town, and usually not even across their own entire LM.

There is currently no District-wide coordinated marketing which focuses on promoting tourism in the District in its entirety.

5.3 Assessment of Emergency Services and Infrastructure

The importance of emergency services and infrastructure from a tourism perspective is two-fold:

- Access to appropriate emergency services and infrastructure, specifically medical services;
- Availability of information regarding emergency services.

State hospitals are situated throughout the Chris Hani area, and these provide a broad range of basic medical care and ambulance emergency services. In addition, the area has a number of supporting clinics and mobile clinics (see Appendix 2 for complete list off all the facilities available).

HEALTH FACILITIES IN THE CHRIS HANI DISTRICT MUNICIPALITY	
Inxuba Yethemba Local Municipality	18
Tsolwana Local Municipality	16
Lukhanji Local Municipality	42
Emalahleni Local Municipality	36
Sakhisizwe Local Municipality	15
Engcobo Local Municipality	21
Intsika Yethu Local Municipality	36

(Source: Kyle Business Projects from Municipal Demarcation Board, Municipal Profiles 2006)

Table 12: Number of health facilities in the Chris Hani District Municipality.

POLICE STATIONS IN THE CHRIS HANI DISTRICT MUNICIPALITY			
1	CALA	18	DALASILE
2	SCHOOMBEE	19	GLEN GREY
3	MOLTENO	20	TSOMO
4	KLEINBULHOEK	21	BOLOTWA
5	CRADOCK	22	MORTIMER
6	HENDERSON	23	THORNHILL CISKEI
7	COFIMVABA	24	ELLIOT
8	XALANGA	25	HOFMEYR
9	BRIDGE CAMP	26	MIDDELBURG(K)
10	TYLDEN	27	KOLOMANE
11	ENGCOBO	28	NTABETHEMBA
12	DORDRECHT	29	QUEENSTOWN
13	INDWE	30	WHITTLESEA
14	BACELA	31	LADY FRERE
15	STERKSTROOM	32	TARKASTAD
16	GUBENXA	33	EZIBELENI
17	IDA	34	ILINGE

Table 13: Police Stations in the Chris Hani District Municipality.

The South African Police Services operate in 34 police stations in the area as shown in Table 13.

Whilst crime remains a serious issue within the District, the South African Police Services (SAPS) are undertaking numerous strategies through which to combat crime. SAPS records the incidence of crime on a daily basis, and utilises this information to manage the crime situation in the region.

Some of the key challenges faced by SAPS in addressing crime relate to the poor quality of some roads which lead to police stations. This is most notable in rural areas. The result is such that it is difficult for the residents of the area to access police stations. In addition, infrastructure capacity – particularly with regards to the holding cells is an issue. There is currently insufficient jail accommodation in the area. As a result, many convicted prisoners are kept in holding cells.

It is noteworthy that the SAPS boundaries and those of the Local and District Municipalities do not coincide. As a result, the coordination of activities is often a challenge.

There is no effective engagement between operators in the tourism industry and the SAPS to ensure a tourism-friendly response from the SAPS to incidents involving tourists.

The DTO / Tourism Development Officer should facilitate this development of the SAPS through tourism sensitization and capacity-building.

Although the Chris Hani IDP identifies strategies to promote the safety and security of residents and visitors, no specific measures are documented to ensure that the peculiar difficulties experienced by tourists (eg language barriers, loss of travel documents and financial instruments, medical or pharmaceutical requirements etc) are adequately managed.

5.4 Assessment of Transport Infrastructure

Roads in the Chris Hani area are a combination of tarred and gravel surfaces, in fair to poor condition. The roads throughout the District are as follows:

- The R56 trunk road runs through Dordrecht and Indwe towards Elliot in an east / west direction, and the the R344 main road runs between Sterkstroom and Dordrecht, while the R392 link road runs between Queenstown and Dordrecht – these are all in a fair to poor condition.
- The R393 (linking Lady Frere to Cala in the east) and R396 (linking Lady Frere to Indwe in the North) are both gravel roads in poor condition, but are currently earmarked for or undergoing improvement.
- The main N10 trunk road between Cradock and Middelburg has recently undergone major repairs, and is now in a fair condition.
- The R61 (Graaff-Reinet – Cradock – Queenstown, R390 (Cradock – Steynsburg), and part of the R56 (Middelburg – Steynsburg) are tarred and in fair condition.
- The R58 between Engcobo and Elliot is a tarred road in a reasonable state of repair.
- The R408 & R409 is tarred and in a reasonable stae of repair.

- The main road through Engcobo, Tarkastad and Hofmeyr is a tarred road in a good state of repair.
- The R344 between Tarkastad and Balfour is a gravel road in a bad state of repair. The Department of roads are in the process of repairing a portion of the road from Bedford.
- The R391 (Hofmeyr – R56) is a gravel road in a reasonable condition.
- The R401 (R61 – Hofmeyr) is tarred for 27km whilst 18km is gravel.
- The R401 (Hofmeyr – N10) is a gravel road in a reasonable condition.
- All District Roads in the Engcobo/Tsolwana area are gravel and in a bad state of repair – require extensive maintenance.
- The R58 (links Elliot with Cala and Engcobo to the south and Barkley East to the north) is tarred and in a reasonable condition.
- The R56 (links Elliot with Ugie to the north and Indwe to the south) is tarred and in reasonable condition.
- The TR 07401 (links Cala to Elliot via the R58) is tarred and in a reasonable condition.
- The DR 08040 (Cala - Lady Frere) is tarred and in a very good condition.
- The DR 08038 (Cala - R61) is a gravel road.

Within the urban areas the condition of the roads is with a few exceptions generally poor, and in many areas the handling of stormwater is problematic. Access across streams and watercourses is generally poor during rainstorms, and there is a district-wide need for the construction of appropriate causeways and bridges.

The following airstrips exist:

- at Engcobo – requires upgrading
- at Cradock and Middelburg
- at Tarkastad – requires upgrading
- at Blanco Guest Farm in the Tsolwana Local Municipality
- at Elliot

5.4.1 Communications

Communications infrastructure in the Chris Hani area comprises Telkom fixed lines and cellular base stations.

Although access to Telkom fixed-line service is limited, Telkom is promoting the deployment of DECT-based microwave systems throughout the area. Cellular service from the 3 networks is generally available to approximately 85% of the Chris Hani area.

Access to cellular telephone signals in the more remote areas and along the main roads is critical for tourism. The further deployment of network coverage into unserved areas should be addressed with the network operators.

5.5 Issues Analysis

The following key tourism-related issues have been identified in the Chris Hani area:

1. Roads:
 - Quality and state of repair of the primary roads in and through the Chris Hani District
 - Quality of secondary roads in the area
2. Maximise synergy with and extract value from:
 - Karoo Heartland Route
 - Liberation Heritage Route
 - Friendly N6 Route
 - the Mountain Zebra National Park
3. Definition of the tourism product
 - Clearly define the tourism product in terms of the region's strengths
4. Black empowerment:
 - tourism must benefit the individuals in the community;
 - new tourism products
 - training & employment
 - measurement of job creation by tourism
 - measurement of HDI involvement in tourism
5. Training:
 - Local guides
 - Hospitality industry
 - Schools offer tourism-relevant curriculum
6. Product quality:
 - Guest houses – quality and registration
7. Marketing:
 - of the Chris Hani area
 - the individual towns
 - products
8. Distribution of tourism – spread to the other areas of Chris Hani by distributing new products
9. Organisational structure & responsibilities
 - Chris Hani Tourism
 - Relationship and functionality of individual Tourism Associations
10. Support:

- Support for SMMEs – SEDA office in Queenstown
- Link community to opportunities & advise on support
- Negative impacts of tourism on the lifestyle of residents
- Management of heritage

5.6 SWOT Analysis

The SWOT analysis is a strategic planning tool used to evaluate the Strengths, Weaknesses, Opportunities, and Threats involved in a project or industry. It involves firstly specifying the objective of the project, and then identifying the internal and external factors that are favorable and unfavorable to achieving that objective.

The SWOT are defined as:

- Strengths: attributes of the organization that are helpful to achieving the objective.
- Weaknesses: attributes of the organization that are harmful to achieving the objective.
- Opportunities: external conditions that are helpful to achieving the objective.
- Threats: external conditions that are harmful to achieving the objective

The identified SWOTs are used as inputs to the development of possible strategies, through repeated posing of the questions:

How can we Use each Strength?

How can we Eliminate each Weakness?

How can we Exploit each Opportunity?

How can we Defend against each Threat?

In the context of the Chris Hani District Integrated Tourism Plan, the SWOT analysis represents an aggregation of the SWOT analyses of the individual Local Municipalities, to identify the SWOTs which are common and therefore District-wide. These SWOT are then relevant as a basis for the development of District-based strategic actions, in order to promote the development of a growing, vibrant and sustainable tourism industry in the Chris Hani District.

The aggregated SWOT analysis for the Chris Hani District is given in the following sub-sections. The complete SWOT analyses for the individual Local Municipalities are given in Appendix 9.

5.6.1 Strengths

- Location – stop-over en route coast / inland
- Accessible – coastal cities (captive markets)

- Existing tourism routes & potential new routes (Liberation Heritage, N6, Karoo Heartland, Agritourism, Khoisan, Maluti)
- Range of heritage products (koi-San, frontier, Xhosa, British settler, liberation, fossils, rock art)
- Natural environments – parks, reserves
- Range and distribution of accommodation

5.6.2 Weaknesses

- Tourism brand: Lack of tourism brand identity for the District
- Marketing: Low cooperative marketing and promotion of the area
- Products and attractions: no critical mass of attractions, lack of cohesion in the tourism product
- Cooperation: Low cooperation between product owners / tourism roleplayers
- Transport infrastructure: Large distances between towns/ attractions, quality of road infrastructure
- LTOs – formal structures often lacking
- Tourist information / LTOs - quality & availability of tourist information (after hours), low cooperation and not benefiting from synergies with regional/provincial/national tourism organisations;
- Community tourism awareness - Lack of awareness about what tourism means to the community
- Tourism product signage
- Services and infrastructure: Capacity of bulk services, appearance of towns, emergency services

5.6.3 Opportunities

- Develop as preferred inland / coast stop-over destination: development of facilities and attractions for this market
- Develop a range of attractions to provide a varied tourism experience (heritage, environment, nature, fossils, rock art, agriculture)
- Coordinated marketing of the area through a brand strategy
- Develop tourism cluster destinations to encourage longer length of stay by targeting niche markets
- Improve cooperation and coordination between product owners – build itineraries
- Develop clusters and community-based products based on tourist routes
- Development of LTOs and tourist information centres / services
- Development of events and festivals

5.6.4 Threats

- Seasonality and maintaining sustainable occupancy levels
- Overdevelopment of nature-based tourism attractions & negative impact on the natural environment
- Lack of involvement of HDI community
- Poor support from ECTB / focus on coast
- Global warming and climate change
- Crime targeting tourists
- Competing Districts / Provinces

6 Tourism Vision and Strategy

6.1 Introduction

A vision statement is a statement of what an organization or industry intends to be in the future, and so facilitate understanding, planning and execution of the course of action necessary to achieve that vision. It is an expression of a long-term ambition, and serves to inspire the development of the organization in the direction of the vision, and at the same time provides a guide to decision-making. Defining the vision is an act of leadership – it provides ongoing leadership to the organization over time. The vision is intended to galvanize roleplayers to achieve defined objectives, even if they are stretch objectives, provided the objectives are specific, measurable, achievable, relevant and time-bound.

A good example of an effective Vision statement comes from New Zealand, which has the vision “Be the cleanest, greenest and most pristine country in the world”. This translates into a tourism positioning statement: “New Zealand - The best holiday left on earth”

A Mission statement tells you the fundamental purpose of the organization or broader goal for being in existence or in the business. It concentrates on the present, and typically explains what the organization provides to its clients. It could define the customer, the critical processes, and inform of the desired level of performance.

6.2 Tourism Vision

The Tourism Vision for the Chris Hani District Municipality was developed through a workshop process with the stakeholders in the area and the Project Steering Committee, and is derived to encompass the Tourism Vision statements of the Local Municipalities.

An analysis of the common elements of the Tourism Vision Statements of the Local Municipalities is shown in Table 14.

ANALYSIS OF TOURISM VISIONS IN THE CHRIS HANI DISTRICT	
Local Municipalities Tourism Vision	Common Elements
Inxuba Yethemba	
To be the preferred destination for nature-based, heritage and cultural responsible tourism experiences in the Eastern Cape province for the benefit of all.	Nature-based; Diverse culture; benefits to all
Tsolwana	
Inkwanca	
To make the Inwanca area a sustainable eco-tourism, cultural (including rock art) and adventure tourism destination.	Eco-tourism, cultural and adventure tourism destination
Lukhanji	
To make Lukhanji a sustainable tourism destination to the benefit of all its people.	Sustainability; benefits to all
Emalahleni	
To be the preferred destination for farm stays, nature-based and heritage responsible tourism experiences in the Eastern Cape province for the benefit of all.	Nature-based; heritage; benefits to all
Sakhisizwe	
Intsika Yethu	
A responsible and sustainable tourism destination of choice for historical and adventurous experiences in the Eastern Cape	Sustainability; historical and adventure experience
Engcobo	

Table 14: Analysis of the common elements of the Tourism Vision Statements of the Local Municipalities in the Chris Hani District.

The common elements of the Vision Statements include the following:

- Sustainability;
- Benefits to all people in the area;
- Nature-based tourism;
- Farmstays and agri-tourism;
- Heritage tourism;

The Tourism Vision for the Chris Hani District should articulate these common elements either explicitly or implicitly. The agreed Tourism Vision for the Chris Hani District is therefore expressed as:

“The Chris Hani District - a sustainable tourism destination offering visitors a quality nature-based and heritage experience with benefits for all people”

6.3 Tourism Mission

The Tourism Mission for the Chris Hani District Municipality District Tourism Organisation (DTO) was developed through a workshop process with the tourism stakeholders in the area and the Project

Steering Committee, and is premised on enabling the Chris Hani District to achieve its tourism vision. The agreed tourism mission for the Chris Hani District Municipality DTO has been defined as:

“Creating an enabling environment which encourages the development and promotion of the tourism industry through cooperation and coordination, and the inclusion of all stakeholders and roleplayers”

6.4 Tourism Development Strategy

A Tourist Destination is a combination of different products appealing to different market segments at each stage of development. The tourism development strategy identifies the business portfolio to be offered to the market, and is derived through an analysis of the tourism product offering and the potential target markets, and active selection of products and markets for emphasis in order to achieve the defined goals.

The process of developing the tourism strategy entails asking and answering the questions:

- What are the goals of the strategy?
- What are the products and product strengths in the area?
- What are the target markets?
- What is the product development strategy?
- How should the product be marketed?
- How do we measure development?

6.4.1 Goals of the Strategy

The growth and development strategy must be aimed at achieving the Tourism Vision of the tourism sector, **“The Chris Hani District - a sustainable tourism destination offering visitors a quality nature-based and heritage experience with benefits for all people”**. The strategy must drive development through the elements of the Mission of tourism in the area, namely **“Creating an enabling environment which encourages the development and promotion of the tourism industry through cooperation and coordination, and the inclusion of all stakeholders and roleplayers”**.

To achieve this, the Chris Hani area must maintain and grow its existing markets, and at the same time attract new markets to become a primary tourism destination.

Ultimately, the strategy must nurture a tourism industry which is growing in line with the defined benchmarks, and so is providing employment and prosperity for all the local stakeholders, and a satisfying tourism experience for visitors.

6.4.2 Definition of the Product

A tourism product is satisfying activity at a desired destination provided by the suppliers. It is a service rather than a tangible good. Tourism products exist as ideas in the minds of prospective buyers. The main service providers in the broader travel & tourism industry are the accommodation sector, the attractions sector, the transportation sector, the retail travel sector and the wholesale tour operators.

In the Chris Hani area, the accommodation sector and the attraction sector currently offer the main products.

Two factors contribute to the attractiveness of a tourism region, the primary features and the secondary destination features. Primary features include its climate, ecology, cultural traditions, traditional architecture and its landforms. Secondary destination features are the developments introduced specifically for tourists, such as hotels, catering, transport, activities and amusements.

Description of the product in the Chris Hani District Municipality

The Chris Hani tourism product focuses predominantly on:

- **nature-based attractions and activities:** National Park, nature reserves, game reserves, geological features, karoo experiences, hunting, paleontology-based attractions (fossils etc), farm stays and activities;
- **heritage-based attractions and activities:** the built heritage in the towns (architecture), the cultural heritage, liberation heritage, rock art;

This product is based on and reflects / showcases the strengths of the area, including the tranquility, remoteness, un-touched natural experience, and the natural environment.

6.4.3 Target Market Segments and Constraints

6.4.3.1 Definition of Target Market

The top 5 niche markets which were identified in the Chris Hani Municipality are:

1. Heritage tourism
2. Nature-tourism
3. Agri-tourism
4. Adventure tourism
5. Avi-tourism

Within these target niches, it is necessary to identify the target consumers, in order to correctly identify the most appropriate media.

6.4.3.2 Target Market Strategy

Primary Market

The primary target markets for tourists to the Chris Hani area have been identified as:

- Domestic holiday, VFR and Special Interest markets;
- Foreign (overseas) Leisure and Special Interest markets;

Secondary Markets

Within the broad primary target markets the following specific markets should be considered in media selection:

- Travelers interested in cultural and heritage tourism experiences
- Travelers interested in wildlife and nature
- Travelers interested in farmstays
- Travelers interested in "outdoor" and "adventure" vacations

6.4.3.3 Product Market fit - Domestic Tourism Market

The readiness and match of the tourism products in the Chris Hani area with the domestic market can be evaluated from the product-market mix data, as shown in Table 15.

CHIRS HANI DOMESTIC TOURISM PRODUCT - MARKET MIX						
Products	Education	Business	Holiday	VFR	Special Interest	TOTAL
Game/Wildlife			√	√	√	3
Heritage/History	√		√	√	√	4
Culture			√	√	√	3
Nature-based			√	√	√	3
Outdoor adventure			√	√	√	3
Conferences	√	√			√	3
Festivals/events	√		√	√	√	4
TOTAL	3	1	6	6	7	23

Table 15: Chris Hani – Domestic Tourism Product-Market fit.

6.4.3.4 Product Market fit - Overseas Tourism Market

The readiness and match of the tourism products in the Chris Hani area with the overseas market can be evaluated from the product-market mix data, as shown in Table 16.

CHRIS HANI FOREIGN TOURISM PRODUCT - MARKET MIX						
Products	Education	Business	Holiday	VFR	Special Interest	TOTAL
Game/Wildlife			√	√	√	3
Heritage/History	√		√	√	√	4
Culture			√	√	√	3
Nature-based			√	√	√	3
Outdoor adventure			√	√	√	3
Conferences		√			√	2
Festivals/events			√	√	√	3
TOTAL	1	1	6	6	7	21

Table 16: Chris Hani – Overseas Tourism Product-Market fit.

6.4.4 Product Development Strategy

The main focus of the Chris Hani DTO is marketing the Chris Hani area. This includes existing products and new products ready for marketing. Although product development is mainly the function of the private sector and service providers, the DTO can play a role in highlighting opportunities for product development in line with the tourism development strategy/priorities, and facilitating cooperation between product owners.

The product strategy for the Chris Hani Municipality encompasses:

- Include new products ready for marketing in route maps and other promotional literature produced by the LTO and DTO as marketing tools,
- Differentiation of product offerings;
- Local diversification of product offerings;
- Development of product linkages and clustering on a District basis;
- Promote and facilitate tourist route development;
- Include community-based tourism projects in marketing efforts;
- Include festivals and special events in marketing actions.

6.4.5 Product Marketing Strategy

The opportunity for Chris Hani Tourism to grow domestic tourism in the Chris Hani area depends on fitting the product offerings with the market segment profiles and then targeting these consumer segments with specific marketing campaigns. These marketing campaigns should be both initiated by Chris Hani Tourism, for example in the local Eastern Cape press and radio, and also piggy-backing on tourism promotions of the District, Provincial and National tourism organizations, such as the seasonal SA domestic tourism promotions (City Breaks, Mountain Escapes, Coastal Getaways, Cultural Discoveries, Countryside Meanders, Bush Retreats and Event Wonders).

The challenge is to cluster the natural, built, cultural and social tourist attractions into packaged tours, itineraries and product offerings for the different consumer tourism segments.

For international tourist markets, the focus must be on the primary channels used by overseas tourists – the internet and word of mouth. In addition, the DTO should target international tourists through the international marketing and promotion campaigns of SA Tourism, by ensuring that the Chris Hani tourism products are aligned with the SA Tourism marketing strategy for South Africa.

An important consideration is that all advertising and promotional material should support the Chris Hani brand identity and corporate communications strategy. All Chris Hani stakeholders should be encouraged to buy into the brand equity. Corporate business should also be encouraged to support and use the Chris Hani logo on all their corporate stationery and advertisements. This increases the exposure of the brand identity in different markets.

6.4.6 Benchmarks

6.4.6.1 Definition and Purpose

It is important before implementing the tourism growth strategy that realistic goals are set to measure performance against agreed targets. This assists the organization to be result-oriented and undertake a review of performance on a regular basis. Performance also needs to be benchmarked against other players in the tourism sector.

A benchmark is an index against which performance can be measured. It is a tool for determining whether certain functions are being performed effectively, and whether their growth is in line with other, comparable destinations, and what improvements need to be made. The starting point for establishing benchmarks for growth is to get a clear fix on the indicators of successful strategy execution. Once these have been established and the process of aligning the indicators with the tourism goals has been developed, then these indicators can be benchmarked against the best-in-industry, best-at-destination, best-in-world, best practice etc. The benchmarks chosen therefore need to be indicators which can be measured, and which give a good indication of performance against strategic objectives, and which can be measured against competitors and industry norms.

With a relatively poor database of tourism statistics, whether on supply or demand, this becomes a difficult task. However, as more reliable information becomes available then the performance standards can be updated and substantially improved.

6.4.6.2 Identified Tourism Benchmarks for the Chris Hani District Municipality

The following tourism benchmarks have been identified for the Chris Hani District Municipality:

- Total number of bednights occupied by international / domestic tourists;
- Average duration of stay of international (8.4n) / domestic tourists (7.6n);
- Average spend per person per day for international tourists (R550), and per person per trip for domestic tourists (R1092) [R143 per person per day];
- Occupancy rates in the different categories of tourist accommodation;
- Number of people employed in the tourism sector;
- Percentage HDI involvement in the tourism industry.

These benchmarks are in line with the statistics reported by SA Tourism, and are defined in more detail in the following sections. At this stage the benchmarks are defined, but the methodology for measuring the required data for comparison with the benchmarks will need to be defined and implemented.

6.4.6.3 Data Collection Methodology and Interpretation

At this stage the benchmarks required for the measurement of the tourism industry in the Chris Hani District Municipality are defined, in line with the tourism statistics available on a national and international basis.

The methodology for measuring the required data for comparison with the benchmarks is not in place, and can be a significant hurdle which needs to be overcome.

In practice, although accurate measurement of the performance of the tourism industry is to the advantage of every participant and product owner, product owners are very reluctant to provide the information which is required in order to calculate the performance. This hurdle must be overcome, possibly through the use of a respected third party, to ensure confidentiality of the data and also confidence in the results.

Although in each case a comparison is made to available Provincial and / or national statistics, these comparisons are not necessarily useful. In effect, the tourism industry in the Chris Hani area should measure its performance in a current year against its own performance in previous years, informed by a comparison of the current year's performance on a provincial and/or national basis with the same previous years.

6.4.6.4 Total Number of Bednights – International / Domestic Tourists

The number of tourist bednights spent in the tourist accommodation in the Chris Hani area compared to the Eastern Cape and SA bednights, is shown in Table 17.

CHRIS HANI BEDNIGHTS COMPARED TO 2005 PROVINCIAL & NATIONAL STATISTICS			
	Domestic	Foreign	Total
Chris Hani	-	-	339,810
*Eastern Cape	14,840,000	3,775,830	18,615,830
*South Africa	154,900,000	62,930,500	217,830,500

(* Source: Derived from SA Tourism, 2005)

Table 17: Chris Hani bednights compared to 2005 Provincial & National statistics.

The total bednights in Chris Hani (339,810), contributes 1.83% of the total Eastern Cape bednights, and 0.16% of the total SA bednights.

A breakdown of the total bednights spent in the Chris Hani area between domestic and foreign tourists is not currently available.

6.4.6.5 Average Duration of Stay

The average duration of stay by domestic and foreign holiday tourists in the Eastern Cape and South Africa in 2005 is shown in Table 18.

AVERAGE STAY (NIGHTS) IN CHRIS HANI COMPARED TO 2005 PROVINCIAL & NATIONAL STATISTICS		
	Domestic	Foreign
Chris Hani		
*Eastern Cape	3.8	6.5
*South Africa	6.3	11.0

(* Source: Derived from SA Tourism, 2005)

Table 18: The average length of stay by domestic and foreign holiday tourists in the Eastern Cape and in South Africa in 2005.

A breakdown of the average length of stay of domestic and foreign tourists in the Chris Hani area is not currently available.

6.4.6.6 Average Spend

The average spend by foreign tourists per day, analysed by the purpose of the visit, is shown in Table 19. This data indicates that foreign Holiday Tourists, part of the primary target market for the Chris Hani area, spend approximately R734.00 per person per day. The average spend per trip for all foreign tourists is analysed by category of expenditure in Table 20. Although the spending patterns for Holiday Tourists are expected to differ from the average, approximately 22.5% of expenditure is on local services such as accommodation, food & beverages, and leisure & entertainment.

FOREIGN TOURISTS SPEND PER DAY IN SA BY PURPOSE OF VISIT					
Year	All Foreign Tourists	Holiday Tourists	Business Tourists	VFR Tourists	Other Tourists
2004	R 1,400	R 860	R 2,636	R 629	R 1,038
2005	R 1,472	R 861	R 1,151	R 579	R 788
2006	R 1,000	R 700	R 900	R 400	R 400
2007	R 880	R 734	R 800	R 447	

(Compiled by Kyle Business Projects from SA Annual Tourism Reports)

Table 19: The average spend per day for foreign tourists in South Africa, by purpose of visit.

FOREIGN TOURISTS SPEND PER TRIP IN SA BY CATEGORY						
	2004	%	2005	%	2006	%
Accommodation	R 2,200	11.2%	R 2,300	10.0%	R 2,400	12.0%
Transport	R 1,000	5.1%	R 1,100	4.8%	R 1,100	5.5%
Food & Beverage	R 1,000	5.1%	R 900	3.9%	R 900	4.5%
Leisure & Entertainment	R 1,100	5.6%	R 1,200	5.2%	R 1,200	6.0%
Medical	R 2,500	12.7%	R 3,000	13.1%	R 3,300	16.5%
Shopping	R 4,500	22.8%	R 5,300	23.1%	R 5,600	28.0%
Other	R 7,400	37.6%	R 9,100	39.7%	R 5,500	27.5%
TOTAL	R 19,700	100%	R 22,900	100%	R 20,000	100%

(Source: Kyle Business Projects from SA Tourism Annual Report 2006)

Table 20: The average spend per trip for foreign tourists in South Africa, by category of expense.

Combining this data indicates that of the R734.00 average spend per person per day by foreign holiday tourists, approximately R165.00 should be spent on local services in the Chris Hani area.

6.4.6.7 Occupancy rates

The estimated occupancy rates in tourist accommodation in the Chris Hani Municipality are shown in Table 21. These data are grouped into accommodation types as defined in the Statistics SA accommodation occupancy statistics, which are shown for the 13-month period from December 2005 to December 2006.

CHRIS HANI DISTRICT MUNICIPALITY TOURIST ACCOMMODATION OCCUPANCIES										
Accommodation Type	Number of Beds								Average room occupancy Chris Hani	Average room occupancy SA (Dec 2005 - Dec 2006)
	Inxuba Yethemba	Tsolwana	Inkwanca	Lukhanji	Emalahleni	Intsika Yethu	Sakhisizwe	Engcobo		
Backpacker & Hostelling	0	0	0	0	0	0	0	0	0.00%	
Bed & Breakfast	75	25	45	416	23	114	91	30	37.79%	46.00%
Guest houses & Guest farms	530	188	0	324	57	88	0	0	30.60%	46.00% / 39.00%
Country House	22	0	0	25	0	0	0	0	25.32%	
Hotels	103	48	21	64	0	0	49	13	18.06%	66.00%
Lodge	70	95	0	84	23	0	22	0	17.83%	39.00%
Self-Catering	155	22	8	137	0	0	10	0	23.12%	
Caravan parks and camping sites	422	10	0	0	0	0	0	0	14.65%	18.00%
TOTAL	1,377	388	74	1,050	103	202	172	43	27.31%	

(Compiled by Kyle Business Projects)

Table 21: Estimated occupancy rates in tourism accommodation in the Chris Hani District Municipality. The average room occupancy rates in South Africa for the 13-month period December 2005 to December 2006 are shown for comparison (Source: Stats SA December 2006 Accommodation Occupancy Statistics).

Although the national occupancy statistics provide a benchmark figure, these average a wide range of grades of accommodation which may not necessarily be available in the Chris Hani area. For example, the national "Hotel" figures average all grades of hotels, from 0 star to 5 star, and all areas (urban, suburban, peri-urban and rural). These average figures may not be representative of the grades of accommodation available in the Chris Hani area.

6.4.6.8 Number of people employed in the tourism sector

SUMMARY OF ESTIMATED TOURISM EMPLOYER AND EMPLOYEE NUMBERS 2000				
Group	Employers	%	Employees	%
Hospitality	35,830	85.0%	476,700	80.0%
Gambling and lotteries	850	2.0%	20,500	3.0%
Tourism & travel services	2,870	7.0%	38,600	6.0%
Sport & recreation	1,560	4.0%	34,400	6.0%
Conservation and leisure	900	2.0%	30,300	5.0%
TOTAL	42 000	100.0%	600 000	100.0%

(Source: Kyle Business Projects from Sector Skills Plan – 2000)

Table 22: The estimated number of employers and employees in the tourism industry in South Africa in 2000.

6.4.6.9 HDI Involvement in the Tourism Industry

HDI involvement in the tourism industry is measured nationally against the Tourism BEE Charter and Scorecard. The Charter and Scorecard measure participation in 7 main areas, namely ownership, strategic representation, employment equity, skills development, preferential procurement, enterprise development, and social development. A national baseline study was conducted on small tourism

enterprises (turnover < R5 million) in 2006. The measured degree of compliance against the 2009 targets is shown in Table 23.

CHRIS HANI DISTRICT MUNICIPALITY TOURISM BEE SCORECARD					
Measure	Chris Hani 2009	National Baseline 2006 (% compliance with 2009)	2009 Weighting	2009 Sub-Weighting	2009 Target
Ownership		6.00%	15.00%	15.00%	21.00%
Strategic representation					
Black people at board level		3.00%	14.00%	3.50%	30.00%
Black women at board level		0.00%		3.50%	15.00%
Black people in Executive Management		2.00%		3.50%	30.00%
Black women in Executive Management		0.00%		3.50%	15.00%
Employment Equity					
Black people in Management		1.00%	14.00%	2.50%	35.00%
Black women in Management		1.00%		2.50%	18.00%
Black people in Supervisory / Skilled Roles		2.00%		2.50%	45.00%
Black women in Supervisory / Skilled Roles		0.00%		2.50%	23.00%
Black people in Staff Establishment		13.00%		2.00%	53.00%
Black women in Staff Establishment		13.00%		2.00%	28.00%
Skills Development					
% Payroll spend on accredited skills development		10.00%	20.00%	5.00%	3.00%
% of Skills Dev spend on black employees				5.00%	75.00%
# of learnerships as % of total employees				5.00%	2.00%
# of black learners as % of total learners				5.00%	80.00%
Preferential Procurement		11.00%	15.00%	15.00%	40.00%
Enterprise Development		33.00%	14.00%	14.00%	1.00%
Social Development					
CSI spend as % of post-tax profits		28.00%	8.00%	3.00%	1.00%
% of new recruits with no prior work experience				2.00%	10.00%
Status of TOMSA levy collector				3.00%	YES

(Source: Kyle Business Projects from Tourism BEE Charter Council - Baseline Study: Small Tourism Enterprises)

Table 23: The Tourism BEE Scorecard, showing the 2006 national baseline degree of compliance of small tourism enterprises (turnover < R5 million) with the 2009 targets.

The degree of compliance with the Scorecard by the tourism enterprises in the Chris Hani District Municipality is not currently known. Each tourism enterprise should be encouraged to evaluate themselves against this Scorecard, and so provide data on the HDI involvement in the tourism industry in the Chris Hani area.

6.5 Tourism Institutional Framework

6.5.1 Background

An overview of the institutional relationships between the national, provincial, district and local levels in the tourism industry in South Africa, including the public and private sector, is shown in Figure 16. An understanding of these relationships is important for an DTO to ensure success in making use of collaborative (piggy-back) marketing of the local tourism products with Provincial and National campaigns.

Tourism Institutional Relationships

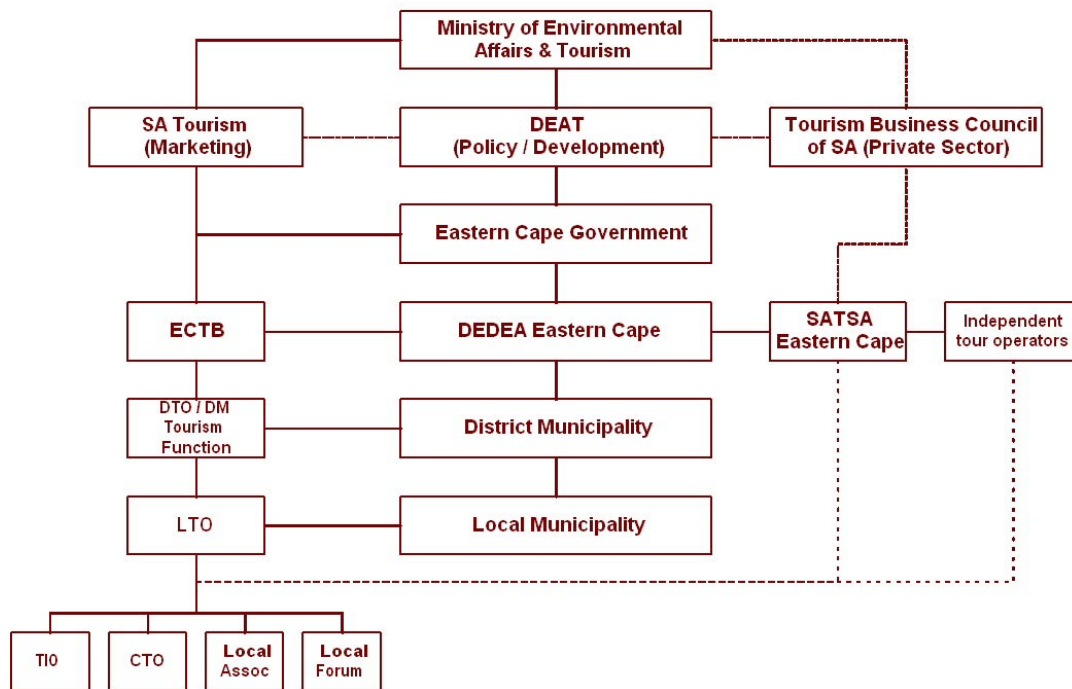


Figure 16: The institutional relationships between the national, provincial, district and local levels in the tourism industry in South Africa.

6.5.2 Developing an effective Visitor Information Network

Although tourist information centres carry different names in different countries, in effect they basically do the same job. Distinction should however be made between the role and function of a Destination Marketing Organisation (DMO) and a Tourist Information Centre (TIC).

A DMO's main function is the actual marketing of the destination and a TIC's main function is providing tourist/visitor information. TIC's are usually a division/department of a DMO, especially in large cities, whereas in small towns the local tourist information centre is both a DMO and a TIC because of limited resources. Some TIC's operate out of a Library building and are not either visible or accessible. One has to add to the equation regional tourism organizations (RTO's) who network with the larger destination marketing agencies but assist the smaller towns with co-operative marketing actions. DMA's receive funds from local municipalities and subscribing members but RTO's only receive funds from district municipalities unless they are a Section 21 Company.

The District Tourism Organisation (DTO) should in effect play a coordinating role, and develop an effective visitor information network thereby linking all the fully functioning LTOs in the District.

6.5.3 Proposed Tourism Institutional Framework Model for the Chris Hani District

The proposed Tourism Institutional Framework Model for the Chris Hani District is shown in Figure 17.

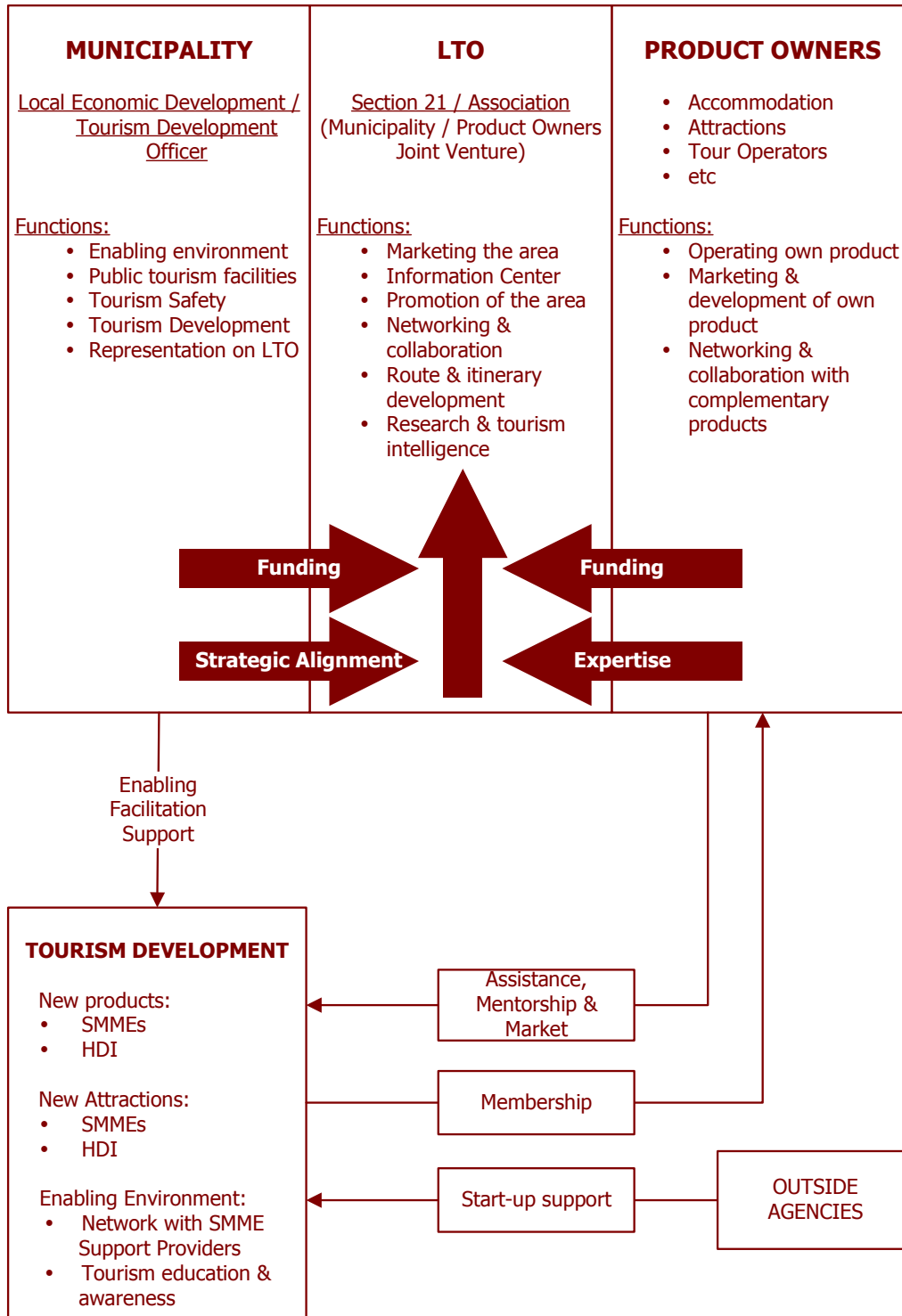


Figure 17: The proposed Tourism Institutional Framework Model for the Chris Hani District.

In this model, the LTO is structured as an independent organization which is a joint venture between local government and the product owners in the area.

Tourism product owners contribute to the LTO through subscriptions and by providing specialist expertise to the Board of the LTO.

Local government contributes to the LTO by providing funding and strategic alignment through the Board of the LTO with the goals and objectives for tourism in the area.

The LTO itself undertakes the activities required to achieve the first strategic priority, namely growing the tourism economy by increasing the number of visitors, and so increasing the economic benefits of tourism to the area as a whole.

The performance and success of the LTO against this strategic priority can be measured, inter alia by measuring the growth of the bednights sold in the area per annum and the effectiveness of the marketing programme.

Through its existing structures but informed by (and in some cases in collaboration with) the LTO, local government undertakes activities to ensure an enabling environment for tourism and public facilities and attractions.

In addition, through the LED / Tourism Development Officer local government undertakes the development of new products and attractions specifically with emerging tourism entrepreneurs and SMMEs. This development will also in some cases involve collaboration with existing product owners, specifically for assistance, mentorship, and access to the market. This element can be facilitated through the LTO, but takes place outside the core function of the LTO, such as in a development forum.

In this manner, local government takes on the tasks required to achieve the second strategic priority, namely diversifying the tourism industry to all sectors of the population.

The success of this strategic priority can be measured by measuring the growth in numbers of emerging tourism entrepreneurs and SMMEs, the growth in their businesses, and by the growth in membership of the LTO.

6.5.4 Application of the Proposed Tourism Institutional Framework Model for the Chris Hani District

The proposed tourism institutional framework model described in Section 6.5.3, has been applied to the Chris Hani District in Figure 18.

This structure essentially makes provision for the following:

- The Chris Hani District Municipality has an LED/Tourism Development Officer;
- The Chris Hani District has an RTO / DTO with a senior marketing person;
- Each local municipality has an LED / Tourism Development Officer
- Each local municipal area has an LTO, which has:
 - A person with marketing expertise;
 - Tourist information offices in all the main centers, manned by Information Officers.

Within this structure, the District-level resources undertake activities on a district level, liaise with parties from other Districts and the Eastern Cape Province, and provide some coordination of the activities at the Local Municipality level. One of the key tasks at the district level is to facilitate networking between the parties in the Local Municipalities.

The resources at the local level undertake activities within the local municipality.

This structure is an ideal solution, but may only be achieved over a period of time as the necessary resources are developed or become available.

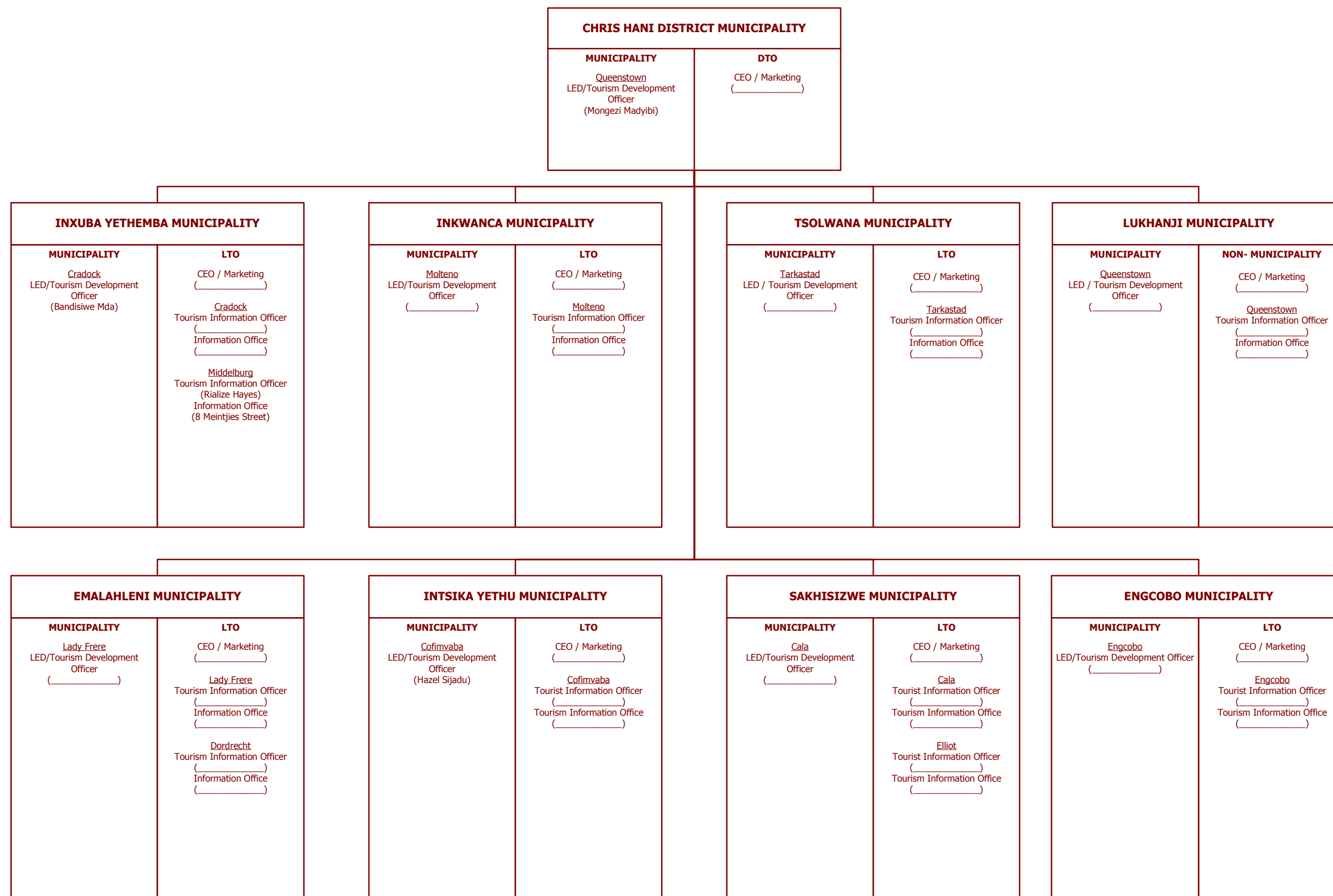


Figure 18: The proposed tourism institutional framework for the Chris Hani District, after applying the model described in Section 6.5.3.

6.5.5 Internal Structure & Operations of the LTO

The internal structure of the LTO must be focused on pursuing its strategy and achieving its objectives through the activities it undertakes.

The structure of successful LTOs internationally is generally similar to the structure shown in Figure 19. This structure can accommodate very large organizations with many tens or hundreds of staff, but can also be adapted to suit small organizations.

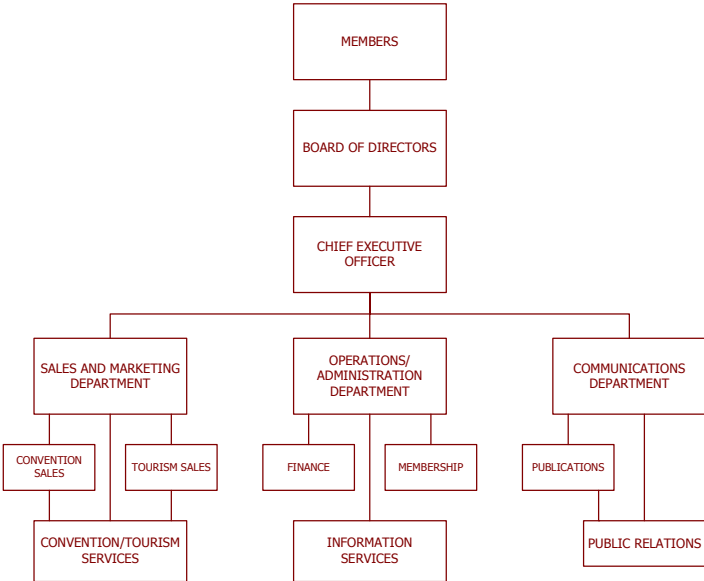


Figure 19: The general structure of successful LTOs.

The key elements of the structure of an LTO are shown in Figure 20. This structure clearly focuses on the core business of the LTO if it is to achieve its strategic objective of growing the tourism economy by increasing the number of visitors, and so increasing the economic benefits of tourism to the area as a whole. Although the Figure refers to the CEO, this structure equally defines the activities and focus areas of a small LTO operated by a single person. The structure also makes clear that the Board is involved in the LTO through specialist committees, through which specialist expertise is available to the LTO.

Again, in a small organization, the members of the Board may contribute their specialist skills directly by assisting and guiding the staff of the LTO.

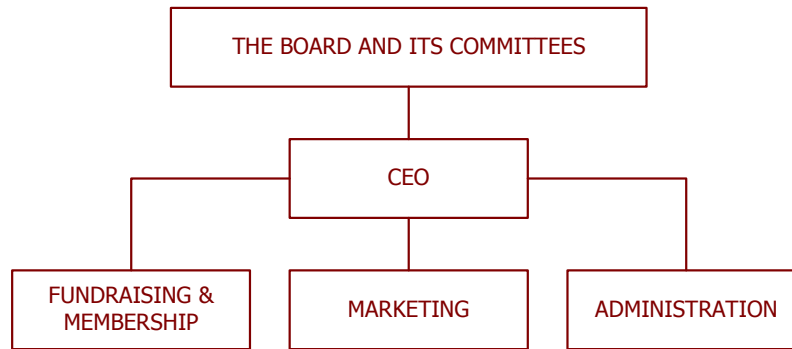


Figure 20: The key elements of the structure of a successful LTO focus on the core business of the organization to drive its strategy and achieve its strategic objectives.

As discussed in Section 6.5.3 and shown in Figure 17, the primary focus of the LTO is on marketing and promoting the area for tourism. Within this focus, the LTO must be familiar with and apply the four “P’s” of marketing, which apply to any industry and stand for:

- Product
- Price
- Place (Distribution)
- Promotion

In the context of the tourism industry these four foundation pillars of destination marketing are explained in Appendix 1 – Destination Marketing, and are encapsulated in the “Tourism Pyramid”, illustrated in Figure 21.

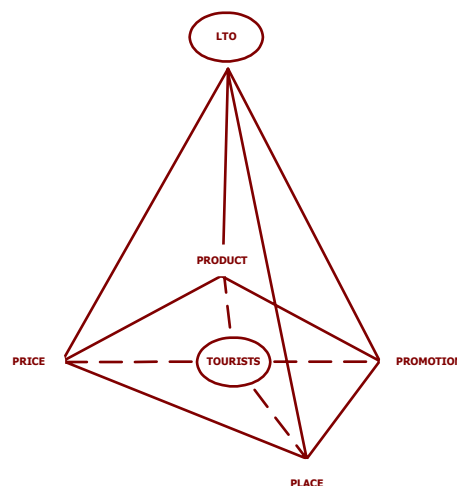


Figure 21: The Tourism Pyramid, illustrating the application of the four “P’s” of marketing in the tourism industry.

Once the internal structure and focus of the LTO is defined, the interactions with the stakeholders can be defined in terms of the market segments for the LTO, as shown in Figure 22.

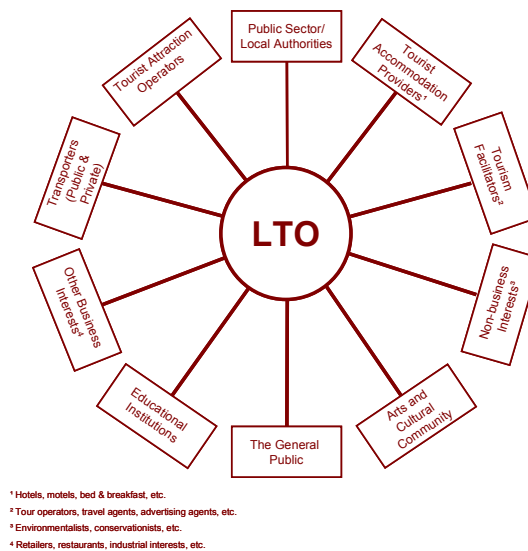


Figure 22: The internal market segments for the LTO, defined by the interactions with stakeholders required in order to achieve its strategic objective.

6.5.6 The Board of the LTO

The Board of the LTO is critical to ensure the success of the LTO. Particularly in the case of a small LTO with limited resources, the members of the Board provide valuable skills and specialist expertise to drive the functioning of the LTO.

The structure and composition of the Board should be informed by the South African tourism landscape, the presence and activities of tourism organizations or their members in the area, and the requirement to provide specialized expertise to the Board and the staff of the LTO.

6.5.6.1 The South African Tourism Landscape

The South African tourism landscape, comprising key players from government, industry and NGOs, is illustrated in Figure 23.

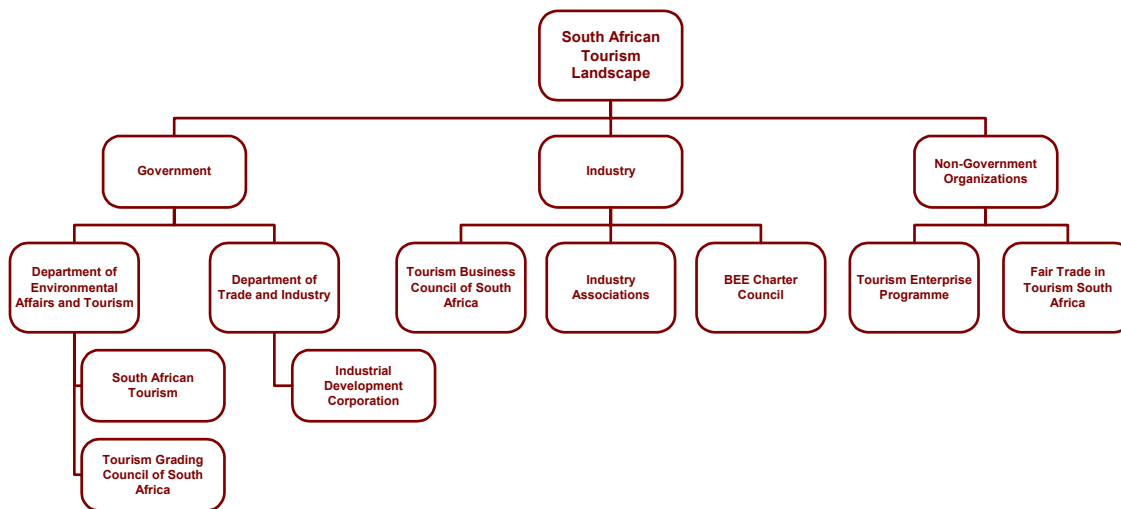


Figure 23: The South African tourism landscape.

6.5.6.2 The Tourism Business Council of South Africa (TBCSA)

The TBCSA is the united voice of the tourism business sector involved in tourism - it does not replace the trade associations but rather represents the combined interests of the business sector. Its primary purpose is to engage with all stakeholders in developing macro strategies that create an enabling environment for tourism development.

The composition of the Management Board of the TBCSA, which is shown in Table 24, illustrates the diverse skills and industries which represent the basic skillsets required for a management board.

TOURISM BUSINESS COUNCIL OF SOUTH AFRICA COMPOSITION OF THE MANAGEMENT BOARD	
MEMBER	POSITION / ORGANISATION
Chairperson	MD: The Don Suite Group
Vice Chairperson	CEO: Tourvest Investment Corporation
Member	CEO: City Lodges Hotels
Member	CEO: Southern African Tourism Services Association
Member	Director: Kifaru Tourism
Member	GM: Airports Company of South Africa
Member	GM: Southern African Vehicle Rental & Leasing Association
Member	PR & Communications Director: Coca Cola Southern Africa
Member	Executive Director: Tourism - South African National Parks
Member	Director: Face to Face Tours
Member	MD: Winchester Mansions Hotel
Member	Public Relations: National Automobile Association
Member	Chairperson: TOMSA and Savoy Hotels
Member	CEO: Board of Airline Representatives of South Africa
Member	MD: Southern Sun Hotels, Inns & Resorts
Member	MD: Bid Travel
Member	CEO: Association of South African Travel Agents
Member	Chairperson: SA Association for the Conference Industry
Member	CEO: Fair Trade in Tourism South Africa
Member	Chairperson: Federated Hospitality Association of South Africa
Member	Chairperson: Community Tourism Association of KZN

Table 24: The composition of the Management Board of the Tourism Business Council of South Africa, illustrating the mix of skills and industries required to ensure successful operation and representation.

6.5.6.3 Key Non-Governmental Tourism Organisations in South Africa

Non-governmental organizations (NGOs) in the tourism sector generally comprise all the industry associations, which represent and promote the interests of the industry and their member sectors (see Table 25). It is possible that each of these NGOs are represented in each local municipality, even through the membership of the NGOs by a local product, and so it may be feasible to obtain membership of the Board of the LTO derived from the different industry sectors represented by the NGOs.

TOURISM NGOs IN SOUTH AFRICA		
TRADE ASSOCIATION/ORGANISATION	ACRONYM	ROLE AND FUNCTION
Association of South African Travel Agents	ASATA	Represents over 500 travel agents and tour operators
Bed & Breakfast Association of South Africa	BABASA	A voluntary association of owners/managers of SMME accommodation
Board of Airline Representatives of South Africa	BARSA	A business association to facilitate, promote, represent & protect its members
Backpackers South Africa	BTSA	Expressed purpose to ensure that its members provide good service
Coach Operators Association of Southern Africa	COASA	Affiliated to SABOA but represents luxury long-distance tour bus operators
Federated Hospitality Association of South Africa	FEDHASA	Functions both as a Trade and Employers' Association
Field Guides Association of South Africa	FGASA	Sets standards for Field Guides throughout Southern Africa
Guesthouse Association of Southern Africa	GHASA	Represents a group of over 200 unique and quality guesthouses
Restaurateurs Association of South Africa	RASA	Ensures that there is a lobby and a voice to speak on behalf of restaurateurs
Southern African Association for the Conference Industry	SAACI	Represents over 600 members dedicated to maintaining & improving standards
Southern African Bus Operators Association	SABOA	Represents the interests of bus operators in South Africa
Southern African Tourism Services Association	SATSA	Represents the private sector of the incoming tourism industry
Southern African Vehicle Rental & Leasing Association	SAVRALA	A trade association representing vehicle renting, leasing & fleet management
Tourism Business Council of South Africa	TBCSA	The voice of the business sector involved in tourism
Tourism Enterprise Partnership	TEP	Facilitates the growth and development of tourism SMMEs
Tourism Marketing South Africa	TOMSA	A trust account that collects funds via a consumer levy on tourism products

Table 25: Key non-governmental tourism organizations in South Africa, representing the interests of their member sectors.

6.5.6.4 Recommended Structure / Composition of the Board of the LTO

Depending on the size of the tourism industry in the area, the Board of the LTO should consist of about 5 – 8 members, at least half of which should be active in the tourism industry. Key skills and expertise which should be included are:

- Attorney
- Accountant
- Community representative
- Non-tourism business
- Tourism business (accommodation, attractions, service providers)
- Marketing

- Representative of the Municipality

6.5.7 Resource Requirements for the LTO

The resource requirements for the LTO can be categorized as:

- Physical (premises, equipment etc);
- Financial (start-up capital, ongoing revenue);
- Human (staff).

These resources are briefly discussed in the following sections.

6.5.7.1 Physical Resources

The key physical resources required for the LTO include:

- **Premises:** these should be well-located for access by tourists, and preferably independent of any of the product owners. The site should be easy to get to for the general public and tourists. The premises should have sufficient internal space for the layout of the information office, as well as for administrative offices. The parking area should be accessible for public and private transport including busses, and sufficient for the envisaged traffic. The premises must have electricity, water, sanitation, and telephone connections. The premises must be clearly signposted
- **Equipment:** The LTO will require the appropriate office furniture (desks etc), as well as display racks for information brochures. Telephone, fax and PC with internet access and e-mail facilities are required. An outside display area for after-hours reference should be available.
- **Stock:** The LTO should have stock of information brochures:
 - All attractions and tourist facilities in the local area;
 - Most attractions and tourist facilities in the neighboring areas / District;
 - Major attractions and tourist facilities in the Province;

6.5.7.2 Financial Resources

The financial resources required for the successful start-up and operation of the LTO include start-up capital for the purchase of the required equipment and establishment of the information office, and operating capital to pay the annual operating expenses.

The start-up capital should cover the acquisition and set-up of the required physical resources. Assuming that the premises are either leased or provided at no cost by the municipality, and

depending on the scale of the LTO, a capital cost of about R50,000.00 should be sufficient for the basic requirements.

An example of an operating budget for an LTO is shown in Table 26. This budget can serve as a guideline for the development of a specific budget to suit the intended size and operations of the LTO, and the available funding.

EXAMPLE OF A TOURISM MARKETING AND DEVELOPMENT BUDGET FOR AN LTO						
Budget	First Year		Second Year		Third Year	
Income						
Municipal Subsidy	R 276,365	61.0%	R 303,900	59.8%	R 335,000	58.6%
Membership Subscriptions	R 32,575	7.2%	R 49,000	9.6%	R 53,000	9.3%
Other (sales, commissions)	R 144,303	31.8%	R 155,185	30.5%	R 183,380	32.1%
TOTAL INCOME	R 453,243	100.0%	R 508,085	100.0%	R 571,380	100.0%
Expenditure						
Salaries & Wages	R 246,817	53.9%	R 275,000	55.0%	R 317,200	55.5%
Admin & Office Costs	R 142,260	31.1%	R 143,875	28.8%	R 157,250	27.5%
Travel	R 10,605	2.3%	R 12,000	2.4%	R 15,000	2.6%
Brochures	R 24,876	5.4%	R 21,600	4.3%	R 24,800	4.3%
Trade & Consumer Shows	R 10,587	2.3%	R 22,000	4.4%	R 25,000	4.4%
Advertising & Promotions	R 2,500	0.5%	R 3,600	0.7%	R 6,000	1.1%
Internet (Direct Marketing)	R 9,600	2.1%	R 11,000	2.2%	R 12,000	2.1%
PR & Media	R 6,288	1.4%	R 6,000	1.2%	R 6,750	1.2%
HR Development	R 4,317	0.9%	R 5,250	1.0%	R 7,300	1.3%
TOTAL EXPENDITURE	R 457,850	100.0%	R 500,325	100.0%	R 571,300	100.0%

Table 26: Example operating budget for an LTO for a period of 3 years. Some of these amounts may be scaled depending on the overall size of the LTO. For example, salaries & wages expenses depends on the number of staff.

6.5.7.3 Human Resources

As in most organizations, having the right human resources is critical to ensuring the success of the LTO. Having the wrong people or the wrong skills will doom the LTO to mediocrity of failure.

The primary focus of the LTO is in marketing and networking. It is therefore critical that the key staff in the LTO have the appropriate marketing skills and temperament. To ensure that the marketing approach is followed within the organization, the most senior person on the staff should be from a marketing background, preferably with experience in the tourism industry.

If separate staff are employed to operate the tourist information office, these staff should also have a marketing / customer service background, and should receive job-specific training on customer service, marketing, the tourism industry, and specific orientation on the local products and attractions.

Critical for the success of a small LTO with a limited budget is having access to specialized expertise through the composition of the Board. Members of the Board should be selected to provide a mixture of tourism marketing, development and operating expertise and experience, as well as if possible financial and legal expertise. The Board then will be a valuable resource for the LTO, providing specialized guidance for the LTO in all its activities.

6.5.7.4 Funding the LTO

Funding the LTO is always a challenge. The main function of the LTO is marketing the area, and this entails advertising, promotion, networking, and giving away free information to visitors and the industry. The LTO is therefore essentially a cost center, rather than a revenue center.

Generally, funding for the LTO comes from 3 main sources:

- Municipal subsidy
- Membership subscriptions
- Other sources (commissions on reservations, sale of information material, fundraising)

Although the municipal subsidy is generally the primary source, especially at start-up, the success of the LTO can drive the balance of funding for the LTO to a point where the membership subscriptions and other sources make up a substantial proportion of the total. Without income from the transient room tax (TOMSA fund), the municipal subsidy will remain an important source of funds for the LTO.

Annual membership subscriptions should be set at a level to provide some income to the LTO, but also provide value to the product owner in terms of benefits received. Typical benefits which the LTO can offer to product owners include:

- Collective branding and marketing of the area and special events;
- Networking with other product owners and neighboring areas;
- Central reservations / referrals;
- Representation of the product as part of itineraries to local and international trade shows;
- Access to media during media tours, and for special events;
- Networking with emerging entrepreneurs to provide services and attractions.

Funding for the LTO can also be derived from fundraising, specifically from local businesses. This can be motivated on the economic benefit derived by the area from an increase in direct tourism spending. According to the World Travel and Tourism Council's simulated Tourism Satellite Account model for South Africa in 2007, every R1 directly spent by a tourist enables the tourism economy to contribute R2.54 to the GDP, amounting to a total of R3.78 total economic activity. Growth in the tourism industry is therefore in the interests of all businesses in the area, not just the tourism product owners.

In considering potential sources of funding for the LTO, the funding market should be segmented and the appropriate approach devised for each selected target segment. An example of the segmentation of the funding market is shown in Figure 24.

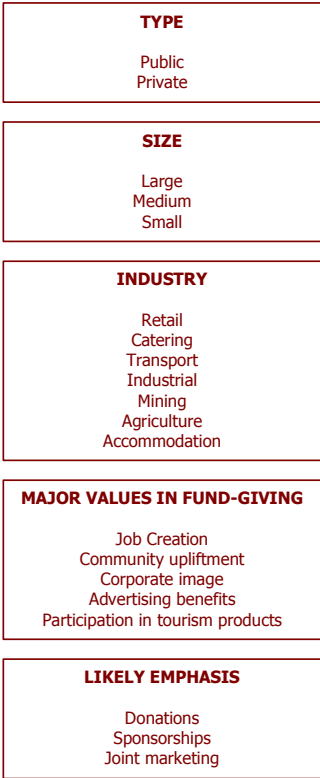


Figure 24: Example of the segmentation of the potential funding market for LTOs.

6.5.8 Internal Structure, Operations and Resource Requirements for the DTO

Similarly to the LTO, the internal structure of the DTO must be focused on pursuing its strategy and achieving its objectives.

Successful District Tourism Organizations (DTO) are formed around the same fundamental principle: appropriate tourism business can be attracted to a destination more effectively through a representative organization than through independent individual actions. A DTO therefore serves like a co-operative, representing all components of a District / destination’s tourism industry, including hotels, restaurants, tour operators, attractions, transport carriers, local authorities as well as the retail and commercial resources that are important to tourists.

The key action words are **cooperation** and **coordination**. In effect this means forging mutually beneficial cooperative alliances to increase the competitive advantage of the district.

Each component of the tourism industry of a destination is extremely competitive; yet they share that competitive spirit with the DTO in order to make it an effective organization able to carry out a comprehensive, unified marketing program for their community. A new word was coined during the process of collaborative economic development (cluster process) i.e. **co-opetition** (cooperation in order to become more competitive). The DTO is therefore a destination or community's single most important marketing organization, projecting an image for that destination into the various target markets.

In a district where a local municipality has commissioned the preparation of a Tourism Sector Plan (TSP) for the municipal area, the DTO has an important task to consolidate the various local municipality TSP's into a single TSP for the district i.e. a **Tourism Master Plan**. Thereafter, in fulfilling this key task the **Core Function** of a DTO is to effectively implement an integrated **Plan of Action** and this requires an **Appropriate Structure** and an overall **Tourism Strategy** for the district.

Where necessary and appropriate, the DTO must further provide vital district-wide coordination and support for the individual LTOs in the District. The support roles could include direct funding support through grants, provision of specific training, capacity building and human resource development, and support and coordination of joint marketing efforts among the LTOs. The DTO should also provide an avenue for interface with external support service providers for the development of products and the industry in the District, and interface to District and Provincial Government structures, and to national structures such as the SAPS.

The structure of successful DTOs internationally is generally similar to the structure of successful LTOs shown in Figure 19, but with a greater emphasis on the coordination and management of District-wide tourism development and marketing activities.. This structure can accommodate very large organizations with many tens or hundreds of staff, but can also be adapted to suit small organizations.

The resource requirements for the DTO are again similar to those required for an LTO, except that the premises should be geared mainly for office use, and not primarily for access by the public. They may be located adjacent to the premises of the local LTO.

The financial resources required for the DTO are similar to those for the LTO, but with the addition of a budget item for support activities to the LTOs. These costs include those for funding capacity building workshops and training, public tourism awareness-building workshops, and general coordination activities and support.

It is clear that small towns in rural areas will require financial support through means of a subsidy to establish a LTO. It is recommended that this subsidy should be provided through the DTO (CHARTO in the CHDM). The DTO should therefore receive sufficient funding to operate effectively, and also provide the subsidy to the rural towns wishing to establish a LTO. The availability of the subsidy from the DTO would provide an incentive to establish a LTO, and ensure greater cooperation and communication between the CHDTO and LTOs in the area. The subsidy should be linked to performance, and any LTO failing to operate effectively would have the annual subsidy withdrawn.

The total financial budget for the DTO should reflect the additional costs expected for the coordination and support activities of the DTO, in addition to the amounts shown in Table 26, adjusted for the anticipated scale of the activities and the total resources available. It is anticipated that the annual budget of the DTO in the Chris Hani District (CHARTO) should amount to between R1.5m and R2 million, and the annual subsidy granted to LTOs would amount to at least R50 000 per annum.

7 Tourism Spatial Development Plan

7.1 Purpose of the Tourism Spatial Development Plan

The spatial characteristics of any area provide a varied mixture of natural features, resources, infrastructure, settlements and attractions, upon which the area's unique tourism experiences are offered. These spatial characteristics could include mountainous regions and sparsely populated farmlands, densely settled areas, coastal regions, the cities and towns, the farm tracks and freeways, railways and harbours and the unique cultural milieu, which are all intrinsic to the area. In order for the Responsible Tourism Sector Plan (RTSP) to be an effective guide for future spatial distribution of tourism development, a thorough understanding of these spatial characteristics is required.

The Spatial Development Plan (SDP) should highlight the areas of opportunity, describe the tourism sub-regions, identify the existing tourist routes and relate these features to the appropriate gateways, staging posts, distribution points and existing major attractions. The purpose of the SDP is to identify the various components which influence tourism activities and development potential giving consideration to the tourism project proposals included in the IDP. The various attributes are then mapped together to generate a Tourism SDP.

7.2 Topography, Biomes, and Conservation Areas

The topographical features, biomes and conservation areas in the Chris Hani District Municipality are shown in Figure 25, Figure 26, and Figure 27 respectively.

7.3 Current Tourism Environment

The current tourism environment in the Chris Hani District Municipality is shown in Figure 28. This plan shows the existing defined tourism routes, and the location of the tourism products in the area. The list of the marked tourism products, with their map ID numbers, is given in Table 27. The complete details of the tourism products are given in Appendix 6.

Areas of specific interest for tourism are identified in Figure 29.

ID #	NAME	ID #	NAME	ID #	NAME	ID #	NAME
LK1	Ailsa Cottage	LK41	Val's Guest House	IK19	Johannes Meintjies Art Gallery	IT39	Egg Rock
LK2	Aloe Grove Guest Farm	LK42	Masonic Hotel	IK20	Vegkoppies Boer War Memorial Site	IT40	Erin Country House & Farm Cottage
LK3	Camelot B&B	LK43	Rose n Crown	IT1	150 Years of the Great Trek	IT41	Fish River Cottage
LK4	Carnarvon Estates/ The Stagger Inn	LK44	Sterling Hotel	IT2	Aloes Guest House	IT42	Funky Farm
LK5	Carthews Cornor	LK45	Queenstown Airport	IT3	Amali Guest house	IT43	Gereformeerde Kerk
LK6	Cosy Cottage	LK46	Entrance to Lawrence De Lange Game Reserve	IT4	André Bed & Breakfast	IT44	Grave of Olive Schreiner
LK7	Cottage The / Dew Drop Inn B&B	LK47	Lawrence De Lange Game Reserve Entertainment Area	IT5	Annie's House	IT45	Grootfontein Agricultural Institute
LK8	Grace Land Lodge	LK48	Longhill Nature Reserve Picnic Area	IT6	at Schoombee Karoo Accommodation	IT46	Haystead & Ford Building
LK9	KB's Exclusive	LK49	Longhill Nature Reserve Entrance	IT7	Audreyana B&B	IT47	Heritage House
LK10	Kelbricks B&B	LK50	Walter Everitt Gardens	IT8	Beaulahland	IT48	Hillston Farm Cottage
LK11	Linga Longa	LK51	Queenstown Town Hall	IT9	Beestekuil Holiday Farm	IT49	Hotel Middelburg Lodge
LK12	Longview Lodge	LK52	Queenstown - Hexagon	IT10	Betjieskraal Guest House	IT50	Joan's Overnight
LK13	Milner Cottage	LK53	Ruth Lock Shell Art Gallery	IT11	Breë Street	IT51	Karel Theron Primary School
LK14	Mountain Splendour	LK54	JC Marshall Art Gallery	IT12	British Military Pumping Station	IT52	Karoo Country Inn Hotel
LK15	MX Overnight	LK55	Queenstown Library	IT13	Brittish Officers Mess	IT53	Karoo Herberg
LK16	Norwegian Wood	LK56	Queenstown Museum	IT14	BrookField	IT54	Karoo Manor House
LK17	Parkside	LK57	Queenstown Memorial Gardens	IT15	Brulberg Reserve	IT55	Karoo Ouberg Lodge
LK18	Rose Lodge	LK58	Queenstown Golf Club	IT16	Burger Monument	IT56	Karoo Pred-A-Tours
LK19	Siesta B&B	LK59	Entrance to Imvani Game Lodge	IT17	Butterfly Way	IT57	Karoo River Rafting & Cabins
LK20	Studio The	LK60	Bongolo Dam	IT18	Cape Education Department Museum	IT58	Karoo Safari Lodge
LK21	Tiny Gecko B&B	LK61	Waterdown Dam	IT19	Carlton Heights Guest Farm	IT59	Karoo Wire Art
LK22	Twin Oaks	LK62	Bullhoek Masacre Memorial Site	IT20	Carochalets & Camping	IT60	Koelfontein Karoo Guest Farm
LK23	Victoria Manor	IK1	Central Hotel	IT21	Celtis Garden Cottage	IT61	La Fontein
LK24	Wagon Inn	IK2	Phoenix Hotel	IT22	Chair Monument	IT62	Lazy Gecko
LK25	Wainwright Cottage	IK3	Die Herberg	IT23	College Road Guest House	IT63	Lemon Hoek Guest Farm
LK26	Whistler's Corner	IK4	Valschfontein	IT24	Commando Drift Nature Reserve & Dam	IT64	Louvain
LK27	Imvani Game Lodge	IK5	Mountain Lodge Safaris	IT25	Conway Lodge/Halali Safari	IT65	Lynfaden B & B
LK28	Tsolwana Game Reserve	IK6	Laetita Farm Lodge	IT26	Cradock Four Gallery	IT66	Maliphuhle Lilinge Lamakhosikazi
LK29	Aristocrats	IK7	Suurfontein Guest Farm	IT27	Cradock Inn	IT67	Manor Holme cottage
LK30	Avenue Guest House	IK8	Branston Lodge	IT28	Cradock Municipal Caravan Park	IT68	Market Square
LK31	Burrough Guest Lodge The	IK9	Valschfontein Guest Farm	IT29	Cradock Spa	IT69	Market Street
LK32	Buxton Lodge	IK10	Hazelmere	IT30	Cradock Tourist Information Office	IT70	Memorial at Kwanonzame Township
LK33	Carrickmoor Guest Farm	IK11	Stagger Inn	IT31	Cumnor Guest House	IT71	Mi kasa Su Casa
LK34	De Oude Werf Guesthouse	IK12	Black Eagle Lodge	IT32	Desert Inn	IT72	Middelburg Manor
LK35	Heritage Guest House	IK13	Rooipoort	IT33	Die Oude Pastorie	IT73	Middelburg Municipal Caravan Park
LK36	Hexagon Guest House	IK14	Jenny's Cottage	IT34	Die Tuishuise	IT74	Middelburg Tourist Information Office
LK37	Homestead The	IK15	Broughton	IT35	Dit en Dat	IT75	Mount Melsegger Karoo House
LK38	McDonald's Guest House & Caravan Park	IK16	Molteno Dam	IT36	Dorpshuis Guest House	IT76	Mountain Zebra National Park
LK39	Meerlin Guest House	IK17	Molteno Library / Museum	IT37	Dundas Street	IT77	My Home Your Home
LK40	Mountain View Guest House	IK18	Molteno NG Church	IT38	Dutch Reformed "Mother" Church	IT78	Nannheim B & B

ID #	NAME	ID #	NAME	ID #	NAME	ID #	NAME
IT79	Nickye & Co Cottage	EM6	Highveld Lodge	EG37	Grave of Nobengula(Nyanga)	SA30	Agricultural Technical Services Building
IT80	Nietgemand B&B	EM7	Dordrecht Kloof	EG38	King Rharhabe Grave (Ngqogi)	SA31	Hota Mbuleni Waterfall
IT81	Old Waterpump	EM8	Bradgate B&B	EG39	Engcobo Guest House	SA32	Mbenge Waterfall
IT82	Oukop "Hill"	EM9	Highland Lodge	EG40	Mastandi Guest House	SA33	Mahlungu Waterfalls
IT83	Oukor Overnight Rooms	EG1	Ngqobusini Waterfall	EG41	Ulundi Hotel	SA34	Mbodlane Waterfall
IT84	Palm House	EG2	At Khovoti Forest	EG42	The White House B&B	SA35	Intaba Lodge Waterfall
IT85	Protea Place	EG3	Khalinga Mountain	EG43	Fundani Community Centre	SA36	Farm Waterval Waterfall
IT86	PW Vorster Museum	EG4	Singeni Location	EG44	Ikwezi Lomso Community Centre	SA37	Farm Brosdile Waterfall
IT87	Rooipoort Guest Farm	EG5	Tsazo Paintings	EG45	Xuka Art Centre	SA38	Farm Suainabhal Waterfall
IT88	Schooling House	EG6	Elucwecwe Paintings	EG46	Isivivane Rain Mountain	SA39	Langanci Forest
IT89	Schoombeesklip	EG7	Kwa Xoxo Paintings	EG47	Ezihogweni Evil Forest	SA40	Mahlungulu Forest
IT90	Shalom Guest Lodge	EG8	Hill of Vultures	SA1	Cala Town	SA41	Cala Forest
IT91	Sherborne B & B Farm	EG9	Qoba Mountain	SA2	Mnx	SA42	Drakensberg Mountain
IT92	Sir John Cradock Guesthouse	EG10	Ngqobusini Waterfalls	SA3	Tiwane	SA43	Mtinggwevu Mountain
IT93	Sonnett Olls Gallery	EG11	Mnyoko Mountain/Forest	SA4	Upper Lufuta	SA44	Mbenge Mountains
IT94	Steam Roller	EG12	Mkonkotho Forest	SA5	Mbodlane	SA45	Cape Vulture Colony (Ixhalanga)
IT95	The Cradock Club	EG13	Khovoti Forest	SA6	Sifondile(Lahlangubo Caves)	SA46	Thompson Dam Nature Reserve
IT96	The Cradock Four Memorial	EG14	Khalinyanga Mountain	SA7	Intaba	SA47	Mnx Mission
IT97	The Cradock House	EG15	Mtuntloni Mountain	SA8	Inkciyo	SA48	DRC Mission
IT98	The early 20th century horse drinking trough	EG16	Kumanina Forest	SA9	Denorbin	SA49	Monument for Political Heroes in Cala
IT99	The Fish Eagle	EG17	Ngxangxasi Wetland	SA10	Xalanga Sandstone Bridge at Cala	SA50	Chief Gecelo's Grave at Mbhenge
IT100	The Great Fish River Museum	EG18	Gulandodo Forest	SA11	Cala Magistrate Court	SA51	Hota Mbeleni Peach Project
IT101	The Inxuba Yethemba Municipal Park	EG19	All Saints Forest	SA12	Cala Town Hall	SA52	Masithembe Arts and Crafts (Cala)
IT102	The Irelander	EG20	Manzana Forest	SA13	Cala Anglican Church	SA53	Elliot Beaders (Elliot)
IT103	The Jurie Lombard Watermill	EG21	Khalinyanga Forest	SA14	Cala Roman Catholic Church	SA54	Mbenge Beadwork Project
IT104	The Schreiner House	EG22	Cefane Forest	SA15	Cala Dutch Reformed Church	SA55	Nyalasa Beadwork Project
IT105	The Stables	EG23	Ezihogweni Forest	SA16	Cala High School	SA56	La Gilda Hotel
IT106	Tjaart's Lodge	EG24	Satans Nek	SA17	Cala Hospital	SA57	Sinako B&B
IT107	Uncedo Lwethu Women's Group	EG25	Qhulunqu Mass Grave	SA18	Cala Holy Cross Convent	SA58	The Palace B&B
IT108	Victoria Manor	EG26	King Ngubencuka's Grave	SA19	Cala Old Prison	SA59	Kwa Nokhaya B&B
IT109	Vusubuntu Cultural Village	EG27	Clarkbury Mission	SA20	Cala Road Police Station	SA60	Topiary B&B
IT110	Wall of Remembrance	EG28	St Albans Mission	SA21	Cala Road Railway Station	SA61	The Stone Post Self Catering
IT111	Warden House	EG29	Mjanyana Leper Institute	SA22	Xalanga Hotel and Bar	SA62	Myburgh Lodge
IT112	Witkrans Lodge	EG30	Manzana Mission	SA23	Old Farm House	SA63	The Rose Garden
IT113	Wolwelei B & B	EG31	Lehehewini MK Camp	SA24	Transkei/RSA Border Post	SA64	Merino Hotel
EM1	Indwe Resort	EG32	All Saints Mission	SA25	Dutch Reformed Church	SA65	Elliot Caravan Park
EM2	Indwe Hotel	EG33	Njanga High School (Thabo Mbeki)	SA26	Du Plessis Hall (First Church)	SA66	Thompson Dam Resort
EM3	Washington Guest Farm	EG34	Quthubeni Village (Walter Sisulu)	SA27	Town Hall	SA67	Langhurst B&B
EM4	Jonashoek B&B	EG35	Quthubeni Great Place	SA28	Anglican Church	SA68	Intaba Lodge
EM5	97 Grey Street B&B	EG36	Ntaka Battlefield	SA29	Library	SA69	Tulloch Self Catering

ID #	NAME	ID #	NAME	ID #	NAME	ID #	NAME
TS1	The Royal Hotel	TS24	Commando Drift Nature Reserve	TS47	Isolomzi Dancers	IY5	Gcibala2
TS2	Lesleys B & B	TS25	Tsolwana Game Reserve	TS48	Itekeng Bead project	IY6	Gcibala3
TS3	Carrickmoor Guest Farm	TS26	Ratelshoek Guest Farm	TS49	Tsarona Pottery	IY7	Lutuli
TS4	Blanco Guest Farm	TS27	Falcon Ridge	TS50	Maluti Sotho Hats Project	IY8	Lutuli
TS5	Knowley Cottage	TS28	Groen Fontein	TS51	Thandolwethu Beadwork	IY9	Sibonda
TS6	Redcliffe	TS29	Lelik Poortjie	TS52	Traditional Dancing Group	IY10	Mbulu
TS7	Highland Home	TS30	Hartbeesfontein	TS53	Tsolwana Game Reserve	IY11	Tsomo Information Lay-bye
TS8	Tsolwana Game Reserve	TS31	Carrickmoor Guest Farm	TS54	Amaqwati Tribal Area	IY12	Tsomo Methodist Church
TS9	Commando Drift Nature Reserve	TS32	Amajuba	TS55	Commando Drift nature Reserve	IY13	R61 - Gateway Information Office
TS10	Ratelshoek Guest Farm	TS33	Wildschutsberg	TS56	Vlekpoort Nature Area	IY14	Cofimvaba Information Office
TS11	Rhino Inn Caravan Park	TS34	Modderfontein Battle Site	TS57	Fenella Falls, Spring Valley	IY15	Tsomo Methodist Church
TS12	Glenetive	TS35	Olive Schreiner house	TS58	Amajuba Farm	IY16	St Marks Church
TS13	Athlone Guest House	TS36	Hendrik Potgieter House	TS59	Swallow Kranz Game Reserve	IY17	St Marks Town Centre
TS14	Die Pondokkie	TS37	Slagtersnek Rebellion Site	TS60	Wildschutsberg Game Reserve	IY18	St Marks Gateway Information Centre
TS15	Zeta's B & B	TS38	Bulhoek Massacre Site	TS61	Rietfontein Game Reserve	IY19	Qamata Traditional Council
TS16	Pieterien B & B	TS39	Commando Drift Battle Site	TS62	Bowers Hope Game Reserve	IY20	Qamata B&B
TS17	Victoria Hotel	TS40	Dutch Reform Church	TS63	Winterberg Conservancy	IY21	Horse Riding Ground - St Marks
TS18	Lilyfontein Lodge, Ntabathemba	TS41	Anglo-Boer War Memorial	TS64	Toorberg	IY22	Camama Chesiro B&B
TS19	Swallow Kranz Hunting Lodge	TS42	Hofmeyer Museum	TS65	Bamboesberg	IY23	Lubisi Resort Dam
TS20	Bowers Hope Hunting Lodge	TS43	Covenant Memorial, Fonteintjie	IY1	Esigubude	IY24	Heritage (Ncora)
TS21	Hunters Hill Hunting Lodge	TS44	Ncedisizwe Cooperative	IY2	Nyhaba		
TS22	Rietfontein Hunting Lodge	TS45	Amahlubi Dancers	IY3	Elalini		
TS23	Bamboes Guest Farm	TS46	Zamakulunga Dancers	IY4	Gcibala1		

(Source: Kyle Business Projects)

Table 27: The tourism products identified by the project and marked on the spatial plan of the current tourism environment in Figure 28. The ID number refers to the identification number on the spatial plan. Full details of the products are provided in Appendix 6.