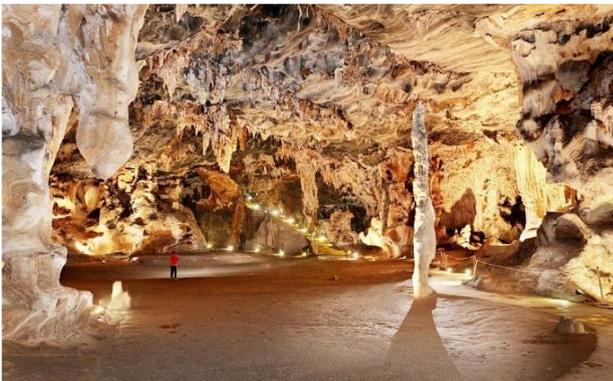




## Garden Route and Klein Karoo Tourism Strategy 2019 – 2023



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## **LIST OF ABBREVIATIONS AND ACRONYMS**

**BPO – BUSINESS PROCESS OUTSOURCING**

**GDP – GROSS DOMESTIC PRODUCT**

**NDP – NATIONAL DEVELOPMENT PLAN**

**RTO - REGIONAL TOURISM ORGANIZATION**

**LTO – LOCAL TOURISM ORGANIZATION**

**LED – LOCAL ECONOMIC DEVELOPMENT**

**VFR – VISITING FRIENDS AND RELATIVES**

**DEADP - DEPARTMENT OF ENVIRONMENTAL AFFAIRS AND  
PLANNING**

**DEDAT – DEPARTMENT OF ECONOMIC DEVELOPMENT AND TOURISM**

**PR – PUBLIC RELATIONS**

**NMU – NELSON MANDELA UNIVERSITY**

**SATSA – SOUTH AFRICAN TOURISM SERVICES ASSOCIATION**

**DMO – DESTINATION MARKETING ORGANIZATION**

**EPWP – EXPANDED PUBLIC WORKS PROGRAMME**

**PDP – PERSONAL DEVELOPMENT PLAN**

**ACSA – AIRPORTS COMPANY OF SOUTH AFRICA**

**SAT – SOUTH AFRICAN TOURISM**

**GR&KK – GARDEN ROUTE AND KLEIN KAROO**

**UNWTO – UNITED NATIONS WORLD TOURISM ORGANISATION**

**NTTS – NATIONAL TOURISM SECTOR STRATEGY**

## INTRODUCTION

The Garden Route District Municipality's Integrated Development Plan (IDP) final review 2018/2019 – 2021/2022 states that the tourism industry generally spans across the economic sectors, ranging from accommodation and catering, retail and wholesale, transport, manufacturing, business services and social services. The most visited towns in Garden Route and Klein Karoo include Knysna, Plettenberg Bay, Wilderness, Mossel Bay, George, and Oudtshoorn. Stilbaai is also a popular town for holiday homes. The most visited attractions by tourists in South Africa include the Garden Route (284 000 visitors in 2015), Karoo Ostrich Farms (144 000 visitors in 2015) and the Cango Caves (132 000 visitors in 2015).

Other popular tourist destinations include the Tsitsikamma National Park, Wilderness National Park, Knysna Elephant Park, Birds of Eden, Monkey Land, Robberg Nature Reserve, Knysna Heads, and Tenikwa Wildlife Awareness Centre. Festivals such as the Plett Food and Film Festival, Klein Karoo Arts Festival (KKNK) are also a major boost for the tourism industry in the District. These festivals highlight the importance of public and private sector collaboration in the development and promotion of the tourism industry.

The sectoral linkages, as well as the geographical linkages between towns and areas within the Garden Route, highlights the important role that the ostrich and goods and services from ostrich farming, dairy production, BPO, and oil and gas industries play in the economy. These industries do not only create employment and income in the region for the agricultural and manufacturing sector but also for the retail, transport, communications, catering and accommodation sectors as well as for the finance, real estate and business services sectors.

International and domestic tourism trends change as a result of economic, social and political change. The marketing and development of any strategy of any tourism destination should adapt to meet these new and demanding challenges.

The tourism unit of the Garden Route District Municipality developed this new tourism strategy for 2019-2023 in order to stay up to date with the ever-changing tourism environment and the economy. This is presented as a strategy to align with the reviewed IDP of the Garden Route District Municipality and is

intended to clearly define the strategic priorities for regional tourism and to streamline all tourism activities in the region.

The McKinsey & Company, who supported the Garden Route Rebuild Initiative (GRRRI) process, has assisted the Garden Route District Municipality with stakeholder engagements in order to compile this strategy for the region as part of their involvement in and commitment to the Garden Route Rebuild Initiative, which started in June 2017.

One – on- one meetings were scheduled with each municipal area's Local Economic Development (LED) department, Local Tourism Office (LTO) and private sector stakeholders to ensure buy-in and ownership of this strategy.

A final workshop was held with tourism stakeholders in April 2018 to collate and coordinate all inputs to the strategy.

## LEGISLATIVE FRAMEWORK

The strategy has been developed based on and within the context of the existing legislative policy framework on tourism development and marketing. Legislation and policies considered for developing this document include the following:

- **The Constitution of the Republic of South Africa, 1996** - The object of local government is to promote social and economic development (s150(1)(c))
- **Local Government Municipal Structures Act 117 of 1998, Section 84(1) (m)** – Clearly outlines the role and functions of the district and local municipalities in South Africa. Tourism is clearly identified as a function of the District Municipality and it states that the District Municipality is responsible for the promotion of local tourism for the area of the district municipality.
- **Local Government Municipal Systems Act 32 of 2000** – An integrated development plan must reflect the council's development priorities and objectives for its elected term, including its local economic development aims (s26(c))
- **National Development Plan 2030 (NDP)** South African tourism has aligned its role to the National Development Plan 2030. The National Development Plan (NDP) is the 2030 vision for the country. It envisions rising employment, productivity and incomes as a way to ensure a long-

term solution to reduce inequality, improve living standards and ensuring a dignified existence for all South Africans. The NDP recognises tourism as one of the main drivers of employment and economic growth. The New Growth Path (NGP) includes tourism as one of the six pillars of economic growth.

- **National Tourism Sector Strategy (NTSS)** - The NTSS advocates the development of a Domestic Tourism Growth Strategy aimed at increasing domestic tourism's contribution to the economy. The achievement of the NTSS's objectives is dependent on a collaborative effort between government and the private sector. NTSS provides a blueprint for the tourism sector in the pursuit of growth targets contained in the New Growth Path (NGP).
- **The White Paper on Sustainable Tourism Development and Promotion in South Africa, 1996** - provides a framework and guidelines for tourism development and promotion in South Africa. It identifies the roles that local government, communities and private business should play in promoting tourism.
- **Garden Route Spatial Development Framework** – The SDF visioning session held in 2017 highlighted the alignment of the regional brand and implementation of a regional tourism and investment marketing strategy for Garden Route.
- **Garden Route District Municipality Integrated Development Framework** - The Garden Route District Municipality IDP of 2017/2018 - 2022 identified tourism marketing and development & Film industry (film location catalogue) as a key developmental priority.

## INTERNATIONAL TOURISM TRENDS

International tourism globally has been growing by over 4 per cent per annum from 2010 and reached 4.4 per cent in 2015 (although there were wide regional variances). In 2016, the number of international tourist arrivals increased globally by 3.9% compared to 2015. Both the United Nations World Tourism Organisation (UNWTO) and World Travel and Tourism Council (WTTC) projections suggested that this average global growth rate of around 4 per cent was likely to continue as emerging economies such as China continue to grow. Lower growth rates were however projected for developed economies such as

the United Kingdom (UK), France and the United States (US) with higher growth in some developing economies such as China and certain South-East Asian economies.<sup>1</sup>

According to the UNWTO (2016), the majority of international tourists travelled for leisure and holiday purposes (53%), followed by 27% who travelled to visit friends and relatives (VFR), health, religion and other, and 14% who travelled for business and professional reasons during 2015. This indicates the key role that leisure and holiday-related tourism products play in increasing number of tourist arrivals globally. A number of major trends have been identified as impacting on the world tourism economy, and are equally relevant to South Africa.

(Source: UNWTO)

## **TOURISM IN SOUTH AFRICA**

Tourism in South Africa is one of the fastest growing industries in the country, and its potential to contribute towards job creation, poverty alleviation and GDP has been acknowledged by the South African Government. The tourism sector is not only a multifaceted industry that contributes to a variety of economic sectors, but also a labour-intensive industry with the capacity to create jobs.

The White Paper on the Development and Promotion of Tourism (1996) confirmed South Africa's approach to tourism as one, which is "government led, private sector is driven and community-based", and grounded in cooperation and close partnerships between all stakeholders. This sets the scene and is still relevant today.

Government's recognition of the critical importance of tourism in the economy is evident in the sector's inclusion as one of the priority areas in the initial Industrial Policy Action Plan (IPAP, 2007), the New Growth Path (NGP, 2010) and the National Development Plan (NDP, 2013). The sector is expected to make the required contribution to job creation and the continued growth of the economy. A stand-alone Ministry of Tourism was established in 2009 and the Tourism Act of 2014 was promulgated. The NDP is the national framework for the development of the South African economy. In that plan, tourism is identified as a highly labour intensive industry which stimulates the development of small businesses and which generates foreign direct investment and significant export earnings. Emphasis is placed on increasing the numbers of tourists entering South Africa and the amount spent; the availability of tourism

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infrastructure; positioning South Africa as a regional shopping and business centre, and ease of access by air and travel facilitation through favourable visa regimes.

(Sources: NTSS)

**Figure 1: International tourism indicators to South Africa, 2016-2017**

<b>International Tourism Indicators</b>	<b>2016</b>	<b>2017</b>	<b>16/17 y-o-y % change</b>
Total number of tourist arrivals	10.0 million	10.3 million	2.4%
Total foreign direct spend (excluding capital expenditure) from Tourists	R75.5 billion	R80.7 billion	6.9%
Total number of bed nights spent by tourists	88.8 million	120.6 million	35.7%
Average spend in South Africa per foreign tourist	R8,100	R8,400	
Average length of stay of tourists visiting South Africa	9.2 nights	12.2 nights	

\*Figure 1: Importance of tourism in the Western Cape, Wesgro 2016/17

## PROVINCIAL TOURISM TRENDS

The Western Cape accounted for 16.8 % of all South African tourist arrivals and received 28.6% of South Africa's tourist spend. In addition, the Western Cape held 19.3% of South Africa's bed nights recorded during the period.

*The Western Cape held the following share of South African tourists during 2017:*

Western Cape's share of <b>Africa Land</b> tourists visiting South Africa	3.1%
Western Cape's share of <b>Africa air</b> tourists visiting South Africa	26.7%
Western Cape's share of <b>American</b> tourists visiting South Africa	57.2%
Western Cape's share of <b>Asia &amp; Australasia</b> tourists visiting South Africa	43.6%

**Figure 2: Western Cape Performance indicators to South Africa, 2015-2017**

Western Cape Performance Indicators	2015	2016	2017	16/17 % Change
<b>International</b>				
Total number of tourist arrivals	1,323,283	1,568,357	1,727,913	10.2%
% Share of South Africa's arrivals	14.9%	15.6%	16.8%	-
Total foreign direct spend (excl capital expenditure)	R14.9 billion	R18.1 billion	R23.1 billion	27.8%
% Share of South Africa's spend	21.8%	23.9%	28.6%	-
Total number of bed nights spent by tourists	15,625,036	16,744,578	23,300,297	39.2%
% Share of South Africa's bed nights	19.2%	18.9%	19.3%	-
Length of stay	12.2 nights	11.1 nights	14.1 nights	-
<b>Domestic</b>				
Total domestic trips	1,829,000	2,139,000	1,388,000	-35.1%
Total direct domestic spend	R2.0 billion	R2.5 billion	R1.6 billion	-36.0%
Total annual domestic bed nights	8,316,000	10,393,000	533,000	-94.9%
Length of stay	4.8 nights	4.9 nights	3.4 nights	-

\* **Source SA Tourism, 2018**

## TOURISM OVERVIEW OF THE GARDEN ROUTE AND KLEIN KAROO



Garden Route & Klein Karoo is one of the most beautiful, awe-inspiring stretches of land in South Africa, if not the world.

Nestled between majestic mountain ranges and a brilliant blue coastline, the well-renowned Garden Route & Klein Karoo towns beckon their worldwide audience to sample the simple yet intoxicating, inviting yet thrilling beauty and encounters that are intertwined with the myriad of attractions inherent in its people, indigenous environment and culinary delights.

With all of this on offer, the Garden Route & Klein Karoo stretches from Witsand to Plettenberg Bay, right around to Oudtshoorn as well as Calitzdorp and Ladismith on the R62.

Garden Route & Klein Karoo is situated about 280km from Cape Town and is one of South Africa's richest botanical treasures, where you can lose yourself in nature, surrounded by the splendour of giant Yellowwood or Milkwood trees in one of the indigenous forests.

### **Tourism trends in the Garden Route and Klein Karoo (Wesgro 2015 statistics)**

In 2015, the Garden Route District contributed 7.6 per cent to the economy of the Western Cape (WC), making it the 2nd largest non-metro area within the Province, following the Cape Winelands District. The manufacturing; the wholesale and retail trade, catering and accommodation; and the finance, insurance, real estate and business services sectors contributed the most to the economy of the District in 2015.

Around 1.3 million tourists visited the WC in 2015 equating to approximately 15.6 million bed nights (SA Tourism, 2016) and the majority of visitors to Garden Route and Klein Karoo (61.19 per cent) are domestic visitors originating from the Western Cape, Gauteng and Eastern Cape. A 38.28 per cent of visitors that originate from overseas visit from Germany, United Kingdom, and the Netherlands. The main reason for their visit was holiday/leisure (93.2 per cent), while 3.65 per cent visit for business. The top attractions in the Garden Route for visitors are scenic drives, gourmet restaurants, and outdoor activities (Wesgro, 2015). A new attraction in the area is the developing wine producers in the area of Plettenberg Bay, with 10.21 per cent of tourists visiting these farms in 2015.

Tourism is seasonal in the Garden Route and Klein Karoo, with a large influx of domestic tourists in the December and January period, which provides a major boost for local businesses during that time, with an increase in demand for fuel, retail goods and services. A small proportion of tourists (1.48 per cent) stay in holiday homes. Tourists with holiday homes tend to stay much longer (7 nights or more) which provides a valuable injection to the local economy. Knysna and Stilbaai are popular towns for people from Gauteng to invest in second homes.

The film industry has been identified as a development priority in the Garden Route District economy, hence the development and approval of a film strategy in October 2016. The Garden Route District has a variety of locations and landscapes as well as the newly established Garden Route & Klein Karoo Film Office responsible for the marketing of the region as a film destination and coordination of the industry as a whole. The Garden Route District has been the location for a number of television shows and films, including *The Breed*, *Lord of War*, *Bear Grills: Mission Survive*, *the Bachelor Finland* and *Black Sails*. Various basic film training and orientation programmes are implemented to ensure that as productions are attracted to the area; talented participants are developed to benefit from this growing industry.

## **REGIONAL TOURISM STAKEHOLDERS AND INSTITUTIONAL ARRANGEMENTS**

The Garden Route and Klein Karoo are adjacent and overlapping tourism regions within the administrative boundaries of the Garden Route District Municipality in the Western Cape Province. The regions have complementary attractions with the Garden Route stretching along the South Cape coastline and characterised by a number of scenic places that include beaches, mountains, forests, conservation areas, and heritage sites. The semi-arid Klein Karoo region is home to attractions such as the Cango Caves, ostrich and wine farms, nature reserves, and art and cultural events. Both regions offer high-quality tourism experiences for road-trippers, adventurers, sportsmen, foodies, and anyone who appreciates nature, art, culture and heritage.

The two regions have been marketed together by the national, provincial and local authorities responsible for tourism marketing and development.

There are seven local municipalities within the district and they all provide funding for local tourism offices (LTO's) which are either independent, non-profit organisations or departments within the municipality. Those with external LTO's use a range of organisational and funding models with some LTO's funded exclusively with public funds, and others that supplement their grant funding with membership fees and corporate sponsorship. A summary of the towns and their LTO's is provided in the following table.

Municipality	Settlements with a popover 2000	LTO	Institutional arrangements
Bitou	<b>Plettenberg Bay</b> , Kranshoek, Kurland	Plett Tourism	<p>Plett Tourism is an independent non-profit organisation with a board of directors and an executive chair who manages the operation. In addition to a grant from the Municipality, funds are raised from corporate sponsorships and events.</p> 
George	<b>George</b> , Wilderness, Uniondale Haarlem	George Municipality	<p>The municipality delivers the function in – house.</p> 
Hessequa	<b>Riversdale</b> , Heidelberg, Albertinia, Stilbaai, Slangrivier	Hessequa Municipality	<p>The tourism function is delivered in – house.</p> 
Kannaland	<b>Ladismith</b> , Calitzdorp, Vanwyksdorp, Zoar	Ladismith Tourism Calitzdorp Tourism	<p>The municipality funds both local tourism offices.</p> 
Knysna	<b>Knysna</b> , Sedgefield, Rheenedal	Knysna Tourism	<p>Wesgro is responsible for the delivery of tourism promotion services only on behalf of Knysna Municipality. They will work closely with the Local Economic Development (LED) department of Knysna Municipality to ensure better collaboration between tourism development and promotion.</p> 
Mossel Bay	<b>Mossel Bay</b> , Groot Brak, Hartenbos, Klein Brak	Mossel Bay Tourism	<p>Mossel Bay Tourism is an independent non-profit organisation with a board of directors. It receives an annual grant from the Municipality and raises funds from membership fees and events.</p> 
Oudtshoorn	<b>Oudtshoorn</b> , Dysselsdorp, De Rust	Oudtshoorn Tourism	<p>An independent non-profit organisation, Oudtshoorn Tourism receives a grant from the Municipality and membership fees.</p> 



## The Tourism Value Chain

Tourism is a complex industry, which involves a wide range of stakeholders and businesses working together at different levels to provide a service for individuals or a group of people travelling away from home for purposes of either leisure, business or VFR. Participants include:

- air, road, sea and rail transporters;
- accommodation providers such as hotels, backpackers, lodges, homestays, vacation rentals, caravanning and camping, and bed and breakfast establishments;
- all forms of entertainment, events and attractions (such as parks, and heritage sites);
- tour guiding services;
- restaurants and less formal food service companies;
- travel agents, tour operators and other intermediary services such as meetings professionals; and
- casino's, and shopping centres.

A multitude of "indirect" goods and service providers support the tourism economy, such as those providing food supplies, security, laundry, marketing and other services to the tourism industry

Tourism is misunderstood by many to only mean holiday travel. It is also about business and trade travel, medical and religious travel, and VFR (which accounts for most domestic travel). Special interest tourism (niche tourism), accounts for many particular motivators of leisure and purpose travel, including birding, food and wine tourism, medical tourism, ecotourism, science tourism and cruise tourism.

Furthermore, the system is supported by multiple relations and connections that the sector has with other sector departments, which are essential and have a high degree of influence on the delivery of a complete tourist experience.

Examples include:

- Interactions with the Department of Home Affairs around immigration policies, customs officials at ports of entry;
- the securing of a free and safe environment which is a competency of the South African Police Service (SAPS);
- the Department of Transport (DoT) on aviation and road infrastructure development;

- the Department of Cooperative Governance and Traditional Affairs (COGTA) in relation to support for local government/municipalities, and
- other government departments such as the Department of Arts & Culture (DAC), the Department of Sport & Recreation (DSR), and the Department of Environmental Affairs (DEA), all of which play a crucial role to support tourism.

Value chain analysis is an important technique to analyse the systematic behaviour of various stakeholders in the development and smooth functioning of the tourism sector of any specific area. Each and every driver is providing services to the tourists/visitors directly or indirectly.

See illustration of the value chain below.



## SWOT ANALYSIS

Information on the strengths, weaknesses, opportunities and threats with regard to tourism development and marketing was gathered through the stakeholder consultations. The region should capitalise on the strengths and opportunities and they should inform the strategic objectives and priorities for tourism development in the medium term. The strategy should also respond to and address the weaknesses and threats that have been identified.

<b>STRENGTHS</b>	<b>WEAKNESS</b>
Environmental diversity and beauty	Lack of tourism market data and analysis
Rich cultural history in the area	Fierce competition between towns resulting in independent marketing initiatives
Existing high-quality products and services across a range of tourism niches	Limited capacity available to co-ordinate tourism enterprise development and mobilise funding for collaborative programmes
Policies, regulation and strategies in place to guide development and operation	The region is perceived to be relatively expensive and exclusive in the domestic market
Easy domestic airport access (Cape Town, George, Plettenberg Bay and Port Elizabeth).	Infrastructure provision is uneven in the region, with poor quality visitor amenities in some areas
	Seasonal demand fluctuations
Established local institutions to promote and coordinated tourism (LTO's, SATSA)	No international flights to the local airport
<b>OPPORTUNITIES</b>	<b>THREATS</b>
Immediate positioning of the Garden Route as an alternative holidays destination to Cape Town	Inability to respond quickly enough to shifting marketing demand (brand may be becoming dated)
Strategy positioning of a regional tourism unit	Rising crime and road accident trend
Forum for collaborative between LED and tourism functions in local municipalities	The perception that the tourism industry is exclusionary and not transformed
Private and public sector collaborative	Local tourism capacity and funding challenges
Global demand for experience-based travel	Expanding of unregulated services such as Airbnb

Under-utilized cultural products that provide an opportunity for new product development and linkages across economic sectors	Environment concerns such as limited water supply
Consolidated PR and awareness campaigns for the Garden Route	Inadequate environment protection management

Garden Route & Klein Karoo tourism SWOT analysis.

## WESTERN CAPE TOURISM STRATEGIC OBJECTIVES

- Prioritising the tourism sector as a future export income earner, tax generator and employment creator. Increasing resources and funding to effect or and improve tourism development and tourism marketing in the Western Cape, tourism mandate is not just marketing.
- Benchmarking to see what the most successful tourism destinations in the world do and try to replicate it in the Western Cape.
- Involving more of the local communities, which has great tourism potential and attract them to the tourism sector by providing them with better information about tourism activities and its benefits.
- The creation or improvement of policy that promotes tourism in the Western Cape.
- Strategic ideas to increase tourist arrivals to the Western Cape, for example, ease of travel and efficient booking systems, must be replicated in all the regions.

## REGIONAL VISION, MISSION, AND STRATEGIC PRIORITIES 2019 - 2023

### Regional Vision and Mission

The GR&KK is defined as one of the most beautiful destinations; the regional tourism vision **is to be an inspiring place to visit.**

This is aligned with the growing demand for experiences rather than products and is complementary and inclusive to the LTO's marketing campaigns.

The mission is to increase visitor numbers to the region through:

Strategic partnerships and collaboration,

Research based planning,

Implementation of agreed actions as agreed with the industry stakeholders:

- Developing sustainable new tourism products,

- Facilitating skills development to citizens,
- Creating a safe environment,
- Offering service excellence.

### Values and principles underpinned in Strategy

This strategy is underpinned by the following values and principles:

- Responsible tourism;
- Respect for culture and heritage;
- Service excellence;
- Sector transformation;
- Sustainability;
- Sound market research and performance measurement
- Partnerships between government, private sector and communities
- Transparency; and
- Integrity.

### Strategic objectives of Strategy

The strategic objectives, developed in line with this vision and mission, and informed by the national and provincial objectives and local opinions, are:

#### Effective Marketing

- Increase visitor numbers to the region;
- Enhance the effectiveness of international marketing to establish the Garden Route and Klein Karoo as a destination of choice;
- Expand and improve domestic marketing activities
- Attraction and hosting of events (business, sporting and lifestyle) to improve the seasonal and regional spread of tourism benefits.

#### Visitor Experience

- Diversify and enhance tourism product offerings
- Enhance local destination sites through cleanliness, safety and security, aesthetics, and information improvements
- Enhance tourist safety;

- Improve tourism skills and service excellence.

#### Destination Management

- Improve the focus and delivery of tourism marketing and development support provided by local government (Lobby and ensure policy sustainability support from B's for tourism)
- Effective streamlining and strengthening of collaborative efforts in the region to make more impact. (RTO)
- To provide knowledge to inform policy, planning and decision-making.

#### Transformation

- Promote Broad-Based Black Economic Empowerment (B-BBEE)
- Support sustainable Enterprise development (LED strategies includes tourism development).

#### Facilitate Ease of access

- Enhance ease of access to the region.
- Facilitate ease of doing business to ensure the growth of the tourism economy.

The strategic objectives is based on the following five pillars:

- Effective marketing;
- Visitor experience;
- Destination management;
- Transformation;
- Facilitate ease of access

### **ACTION PLAN FOR NEXT FIVE (5) YEARS**

Objectives	Actions	Role players	Key deliverable
Destination Management	Research and statistics	Lead: RTO B-municipalities/LTO's NMU SATSA Wesgro	- Partnering with research institutions (e.g. Universities) for data collection and analysis.

			<p>- The investigation of new and emerging market segments to focus tourism marketing efforts (e.g. Indian, Chinese, halal etc.)</p>
Effective Marketing	Marketing and Promotion of the region	Lead: RTO B-municipalities/LTO's ACSA	<p>Development of a Regional Marketing material: Develop marketing material e.g. brochures, map. Provide effective updated tourism information and compile route information.</p> <p>Coordination of attendance to Marketing platforms:</p> <ul style="list-style-type: none"> <li>• Branding of region</li> <li>• Set up appointments with tour operators and agents to sign agreements</li> </ul> <p>(*Annual Indaba/ **World Travel Market/</p>

			<p>***Gauteng Getaway)****Namibian Tourism Expo; Regional Tourism Website/Social Media: The Regional Tourism Office (RTO) developed a website and facebook page to market the region. All Local Tourism Office's (LTO's) websites are linked to the RTO website. Updates a regional events calendar on the website. Distribute marketing material at various tourism information locations e.g. Cape Town, George &amp; PE Airports. Constant updating of content and ensure correct links to and from the website. Translation of website into 4 foreign languages. Coordinate and facilitate Itineraries for</p>
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			<p>Media/Tour Operators etcetera:</p> <p>Co-ordinating tour operator, media and film educational to the region.</p> <p>Drawing up tailor-made itineraries to best showcase our offerings and attractions for these groups.</p>
Destination Management	Investigate the regional destination-marketing organisation, as part of the Garden Route Development Agency investigation.	<p>Lead: RTO/Led unit/ PMU unit</p> <p>B-municipalities</p> <p>LTO's</p> <p>SATSA</p> <p>DEDAT</p> <p>SA Tourism</p> <p>DEADP</p>	<p>To investigate the establishment of a central DMO responsible for, Generation of tourism research and insights, Establishment of international branding presence, Creation of packages for tour operators and private tourists, Central execution of marketing activities for the region.</p> <p>Workshop with tourism stakeholders (government and private sector) to</p>

			discuss an institutionalisation strategy for tourism.
Transformation	Tourism development projects: To create employment opportunities by implementing tourism projects.	Lead: RTO Francois Ferreira Academy B-municipalities EPWP DEDAT National Tourism	The coordinating and facilitating of tourism development initiatives in the region to ensure SME's (Small and medium enterprises) and unemployed youth are upskilled and are able to obtain employment. Cater Care project/Assistant Chef training; PDP's for all Cater Care students. To implement the Expanded Public Works Programme (EPWP) targeted at the unemployed, youth, women and people with disabilities, as well as an enterprise development support programme for tourism that creates employment opportunities, i.e. export development

			programme (arts and crafts).
Visitor Experience	The Promotion of Tourism Routes	Lead: RTO B-municipalities/LTO's DEDAT National Tourism Private sector	The investigation of current routes and the status quo of these routes in the District, as well as the investigation and development of new routes with possible linkages into the various towns, resulting in a spread of tourism spend across the district.
Effective marketing	GR&KK Festivals and Events	Lead: RTO Wesgro B-municipalities/LTO's	The support of festival and events. The compilation of an electronic Festival and Events calendar in the district to avoid duplication or events occurring simultaneously.
Effective marketing	To increase domestic travellers to Garden Route and Klein Karoo	Lead: RTO LTO's/B-municipalities SATSA/Private sector/SKAL	Facilitate the initiation of a Garden Route Pass for affordable experiences for domestic travellers (SA ID/SA Passport)

			Seasonal tourism campaigns to address decrease in domestic travellers.
Facilitate Ease of access	ACSA Garden Route Airlift initiative	Lead: ACSA/GRDM All 7 B-municipalities/LTO's Private sector/Business Chambers Agriculture Dept and Farmers Associations.	Form part of Steering Committee and Project committees to drive the tourism agenda in terms of the airlift initiative.
Visitor experience	Tourist Safety Plan	Lead: RTO DEDAT	Update/review current safety plan

## Marketing Platforms

### \*Annual Indaba

INDABA brings together a showcase of Southern African tourism products and services for the international travel trade. Exhibitors in the DEC (Durban Exhibition Centre) include provincial authorities, provincial products and African Countries. In the ICC (International Convention Centre), exhibitor categories include accommodation, tour operators, game lodges, transport, online travel, media publications and industry associations. Outdoor exhibitors include transport, camping and safari companies.

### \*\*World Travel Market Africa

World Travel Market Africa is the leading B2B exhibition for the inbound and outbound African travel & tourism markets. It is a very important platform for us to reach the International Tour operators market.

4127 industry professionals from over 60 different countries & regions at WTM Africa.

Takes place annually in April at CTICC (Cape Town).

### **\*\*\*Gauteng Getaway Show**

The Gauteng Getaway Show takes place at the Ticketpro Dome in September annually.

Showcasing over 350 exhibits including travel destinations, accommodation, outdoor gear, 4×4 products and accessories, motor homes, caravans and trailers, camping equipment and adventure operators.

### **\*\*\*\*Namibian Tourism Expo**

The Namibian Tourism Expo is a consumer show focusing on experience, eco-tourism and networking.

Takes place annually in June in Windhoek.

## **TRANSFORMATION IN THE TOURISM INDUSTRY**

The slow pace of transformation in the tourism sector is still a concern. According to the Transformation Strategy for The Tourism Sector developed by the National Tourism Department in 2018, challenges include the sector's inability to become globally competitive and to successfully facilitate the inclusion of the previously disadvantaged Black people in the sector.

Transformation is a process by nature. Thus, it is crucial that a synergy between all government spheres involved at national, provincial, and local levels as well as the private sector including large enterprises (LEs), qualifying small enterprises (QSEs) and exempted micro enterprises (EMEs) is developed. This will ensure successful implementation and linkages within the transformation scope of the tourism sector. (Transformation Strategy for the Tourism Sector; 2018)

The awareness of legislation and policies has the potential to increase social effectiveness and radical economic transformation in the tourism sector, through policies such as:

- The Tourism White Paper
- The National Developmental Plan
- The National Tourism Sector Strategy
- The Amended Tourism B-BBEE Sector Code

### **Sector-specific challenges with regard to tourism transformation**

According to the 2017 Tourism BEE Charter council:

- The vast majority of tourism enterprises have no black female shareholding
- Exempted Micro Enterprises (EMEs) and Qualifying Small Enterprises (QSEs) have not introduced any full black shareholding into their organisations since they are predominantly family owned and managed businesses.
- There is still a very low level of black female absorption at directorship level of tourism enterprises.
- The recruitment and retention of black skilled staff present a challenge in meeting Employment Equity targets, particularly for Large Enterprises where more specialised skills are required.
- Access to funding remains part of the challenges.
- Awareness of the tourism sector-specific code, as compared to the DTI's generic code, is low.

In May 2016, the Minister of Tourism appointed the new members of the Tourism B-BBEE Charter Council and requested that a plan to accelerate economic transformation in the sector be developed;

The Council submitted the plan to the Minister in February 2017, which was approved in March 2017;

The plan focuses on practical initiatives that can be implemented by the Tourism Industry within the short, medium and long term to rapidly advance the course of transformation in the tourism sector;

The plan proposed the following five (5) key strategic actions to drive transformation in the tourism sector:

- Ensure effective monitoring of compliance with the B-BBEE Codes
- Supporting new entrants into the market
- Institutional Support for new and existing businesses
- Tourism Human Resource Development (THRD)
- Recognition and rewards

## **EVALUATION AND REPORTING MECHANISM**

The successful implementation of the District Tourism Strategy will be possible through proper monitoring and evaluation. This will be done through the Garden District Council Portfolio Committee for Economic Development and Tourism.

## CONCLUSION

Overall, growth, transformation, redistribution and skills development are recurring themes in the development of the tourism industry in the Western Cape and Nationally. Significantly, these themes emphasise the need to utilise the sector to promote economic development in the region.

This strategy has presented an overview of the priorities for regional tourism in the GR&KK for the next 5 years. Roles and responsibilities of the various stakeholders have been defined and categorised.

The process of marketing and managing an area as a destination involves strategic steps:

- identifying the target market, assessing the motivations and needs of that market,
- developing supply-side products and services to satisfy the demands,
- developing a marketing plan with promotional goals,
- developing advertising and media campaigns with an appropriate theme for the target market,
- creating a media and public relations strategy and finally,
- paying special attention to the monitoring, performance and effectiveness of the marketing plan to ensure its success.

A review of strategies and practices that have been successful and is used to define the priority actions and outcomes for the medium term period of implementation.

Destination management and marketing are to create an appealing destination that visitors will choose over another similar destination based on its offerings. Destination marketing is not an easy task as there are so many considerations and furthermore, the appeal of the destination will be ongoing and ever-changing and therefore requiring the constant participation of the municipality, tourism organisations and the residents of the district. The process requires constant review and reflection, by ensuring that a monitoring and evaluation system is in place for regional tourism, the stakeholders will be able to learn as they go and respond more rapidly to shifting markets and opportunities.

The decline in domestic tourism indicates the need to promote a culture of travel amongst all SA's to ensure that industry role players, SAT, Provincial Government and municipalities invest more effort and resources towards unlocking and encouraging domestic travel.