



Draft Tourism Development Framework 2013 to 2017



March 2013

1 Introduction

The City of Cape Town (CoCT) is developing a Tourism Development Framework (TDF) of for Cape Town. In recognition of new global and local trends, opportunities and challenges facing the tourism industry, the commissioned Tourism Development Framework will have a Strategy and Business Plan for the 2013 to 2017 period.

This study is important in that it follows a developmental approach towards:

- ◆ Promoting responsible tourism in Cape Town;
- ◆ Economic, socially and environmentally sustainable development (ensure that Cape Town is a sustainable and responsible tourism destination)
- ◆ Promoting the equitable and wider spatial spread of tourism benefits to local communities
- ◆ Promoting forms of tourism which will enhance benefits to local communities
- ◆ Identifying economic opportunities for emerging entrepreneurs
- ◆ Proposing initiatives to empower local people
- ◆ Recommending tourism development which will bring wider benefits to the society
- ◆ Proposing tourism development which meets the needs of the local communities and tourist yields expectations
- ◆ Encouraging integrated tourism development
- ◆ Encouraging greater participation by the private sector towards realising responsible tourism

2 Study Methodology

The tourism planning process consists of stages as indicated in Table 1. These were used as a guide for the research process and the structuring of this framework.

Table 1: Stages in tourism strategy planning

Contextual analysis	An assessment of the general developmental and economic characteristics of the area to identify issues, constraints and opportunities relevant to tourism development.
Policy and programme review	A review of legislation, policies and regulations identify pertinent issues for tourism development in the area.
Destination situation analysis	This analysis provides information relating to the current situation facing the destination in order to identify strengths, weaknesses, opportunities and threats. The analysis should review the following aspects: <ul style="list-style-type: none">▪ Tourism supply▪ Tourism demand▪ Spatial issues▪ General infrastructure

	<ul style="list-style-type: none"> ▪ Institutional arrangements ▪ Impacts of tourism <p>Such an analysis typically ends with a SWOT analysis to summarise the key findings.</p>
Strategy formulation	The chapter contains the vision, strategic themes or thrusts, goals and actions (what i.e. programmes or projects, how, who, when) to provide strategic direction for tourism development.
Operational implementation plan	This involves packaging of various strategies and strategic considerations into an integrated implementation plan.
Tourism Development Area meetings	Eight tourism area development meetings will be held in the Metro East (Belleville, Khayelitsha and Mitchells Plain), Athlone, the Central Business District, Atlantis, Helderberg and the South Peninsular.
Public Participation Report	A report on the public participation process will be presented to council.
Submission and Approval	The final report was submitted to the Portfolio Committees, Mayco and Council for approval.
Source: The GTA (2006) recommendations as adapted by Urban-Econ for this strategy	

3 Tourism Spatial Development Framework

The TDF takes into consideration the Spatial Development Framework (SDF) which includes an interpretation of the spatial tourism economy.

- ◆ The Atlantic Seaboard is the main tourism node in Cape Town, but there is potential to expand tourism to other areas in order to spread the benefits of tourism across a wider geographical area and also to poorer areas.
- ◆ Tourism development opportunities have been identified mostly around natural, but also around cultural and heritage resources per district. These include a number of scenic routes which is not discussed in depth.
- ◆ The cultural and heritage value of the Cape Flats should be enhanced.
- ◆ Various infrastructure developments have had a positive impact on tourism in some districts.
- ◆ Creative industries and tourism are not developing into an important niche.
- ◆ Potential projects have been outlined.

4 SWOT Analysis

A SWOT analysis was undertaken based on the situation analysis as well as inputs from tourism stakeholders and visitor surveys. Table 2 outlines the SWOT analysis for Cape Town's tourism system.

Table 2: SWOT analysis for the tourism sector in Cape Town

STRENGTHS	WEAKNESSES
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Natural and cultural resources Destination characteristics and marketing strength Institutional arrangements and strong marketing body Responsible tourism issues Well known brand Diversified and private sector driven Hard and Soft Infrastructure	Social and security issues Skewed urban and tourism development High property prices in traditional tourism areas Threats of overdevelopment & Urban Sprawl Poor responsible tourism management Uncompetitive behaviour Skewed marketing to certain areas
OPPORTUNITIES	THREATS
Tourism product development and niche markets Domestic tourism Training and up-skilling Improved linkages Online marketing and new technology Tourism investment in low income areas	Economic factors such as global environment, national performance Competition from other destinations Seasonality IT and connection costs Competing land uses
Source: Compiled by Urban-Econ, 2012	

5. Tourism Strategy Directive

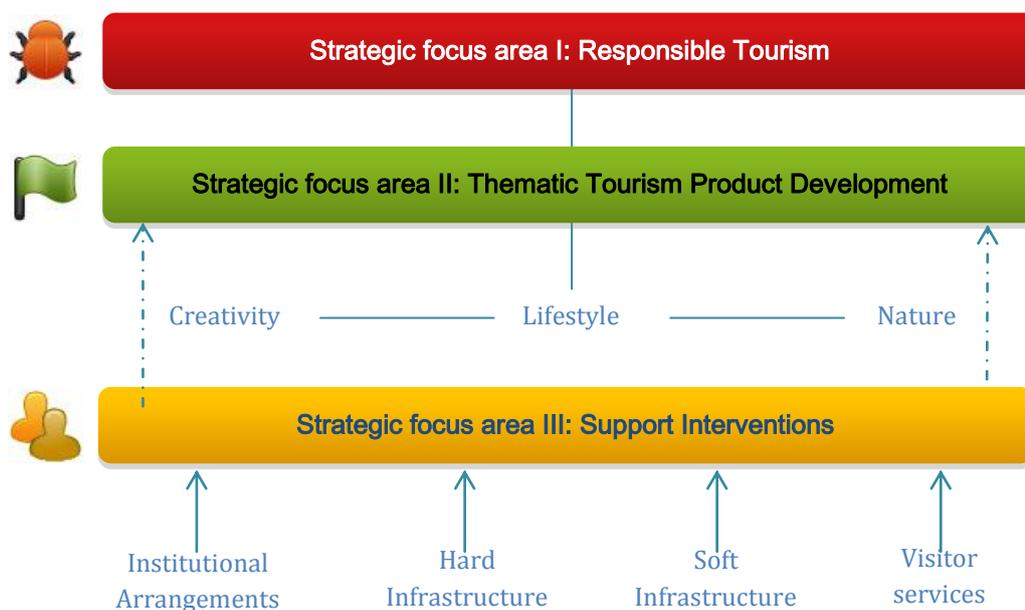
The aim of the TDF is to outline guiding principles, strategic focus areas, key actions and projects (or programmes) for targeted future tourism development in Cape Town.

Guiding principles include:

- ◆ Responsible Tourism
- ◆ Enhance domestic tourism
- ◆ Conserve heritage resources for tourism development
- ◆ Stimulate tourism product development

The summary outline presents the organisation and flow of the strategic elements. The strategic focus areas are outlined below.

Figure 1: Strategic focus areas



The vision for tourism development in Cape Town is as follows:

To position Cape Town as a world class competitor and South Africa's premier Responsible Tourism and events destination

6) Priority Projects

Projects selected as part of the study process were assessed and measured against prioritisation criteria which consider:

- ◆ impact in terms of job creation, SMME promotion, skills development, contribution to the economy
- ◆ Visibility in terms of market potential, project sustainability and implementation considerations

Weights were attached to the criteria chosen, which allowed catalytic projects for development during the next five years to be identified. The prioritised projects are presented per strategic focus area in Table 3.

Table 3: Priority projects per strategic focus area

	Responsible tourism
	<ul style="list-style-type: none"> ◆ Enhanced responsible tourism awareness campaign and workshops ◆ Enhanced responsible tourism awards and other incentives
	Thematic tourism product development
	<ul style="list-style-type: none"> ◆ Cultural heritage trail with improved tourism interpretation centres and infrastructure ◆ False Bay Coastline tourism opportunities ◆ Creative tourism platform – artists and creative firms in the inner city ◆ Public transport for tourism ◆ Markets ◆ Smart phone/ mobile travel App for Cape Town
	Support interventions
	<ul style="list-style-type: none"> ◆ Tourism forum meetings which bring various stakeholders and stakeholders in the local tourism system, tourism enterprises and education institutions together ◆ Targeted tourism entrepreneur programme

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- ◆ Service excellence in tourism
 - ◆ Smart information centres and
 - ◆ Tourism signage
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7) Monitoring and Evaluation

Monitoring activities are internal activities that should be conducted by CoCT tourism department during the process of project implementation, in order to assess the level of effectiveness and efficiency of implementation. The evaluation component intends to express and incorporate the lessons learnt from previous experiences into the decision making process of future development programmes. Monitoring and evaluation is the most efficient when clear outcomes and indicators are identified:

- i. **Outcomes** are long-term impacts such as local economic development, job creation, SMME development, etc.
- ii. **Indicators** can be defined as the measurements that give us information about the change in the condition of certain elements in an economy.

8) Governance and Management Recommendations

The implementation of the TDF needs to be underpinned by the following governance recommendations.

- **Spreading the Benefits of Tourism:** to address Cape Town's uneven spatial patterns
- **Creating an Enabling Environment:** to build capacity at all levels and to formulate a strategy to reduce economic leakages, have continued investment and avoid overregulation
- **Foster Collaboration and Partnership:** by marketing and ensuring a shared vision
- **Enhance Community Involvement:** Through identification of areas of opportunity, community participation and decision-making to ensure ownership

9) Public Participation Process

A comprehensive public participation process is driven to ensure broad participation by citizens and stakeholder groups. The TDF is made available for perusal at a 110 City Libraries throughout the City, Public engagement meetings are conducted in the tourism development areas as identified in the Tourism Spatial Development Framework, and information available on the City's website and in local media. The public participation process will take place from 1- 30 September 2013.