City of Cape Town

Tourism Development Framework for Cape Town

Executive Summary

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1   Background

1.1   Introduction

Tourism has been selected by the Council as one of the economic activities which will play an important role in Cape Town's future. The Council has developed a Tourism Development Framework that sets out the functions and projects that the Council needs to undertake in order to support the development of tourism in Cape Town. The Tourism Development Framework describes how the City plans to work with partners in the public and private sectors and communities to implement the Framework. The Tourism Development Framework will form an integral part of Council's IDP and broader processes such as the Growth and Development Strategy.

The Tourism Development Framework provides directives for preparing Cape Town to be able to provide the products and services that will attract tourists, and to serve our visitors better. The Tourism Development Framework also recommends actions to be taken to ensure that the people of Cape Town benefit economically and socially from the income generated by tourism. The Tourism Development Branch and various departments of the City of Cape Town will be the main parties responsible for the implementation of the Tourism Development Framework.

1.2   What is Tourism Development?

The City defines "Tourism Development" as entailing:

- The sustainable development and maintenance of tourism attractions, facilities and infrastructure
- Expanding the range of products and services available to meet the needs of tourists
- Building a tourism culture and awareness; and
- Building capacity of local business to benefit from the opportunities offered through the tourism industry, with special focus on spreading the benefits to the people of disadvantaged communities.

1.3   What is included in the Tourism Development Framework?

1.3.1   Policy Review and Situation Analysis

The **Policy Review** provides a summary of the principles, guidelines and strategies contained in related documents at national, provincial and city level that has informed the preparation of the Tourism Development Framework.

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The **Situation Analysis** contains an overview of the following destination components:

Tourism products	Tourist facilities & amenities
The natural, cultural, man-made attractions and resources that draw visitors to Cape Town.	The accommodation places (B&Bs, guest houses, hotels, etc.) where tourist stay, as well as tourist information centres.
Markets	**Infrastructure**
The people who visit Cape Town, their characteristics and their opinions and expectations of our tourist products, facilities and service levels.	The transport infrastructure that tourists use to travel to and within Cape Town, as well as road signs, landscaping, ablution facilities, cleansing, etc.

The Situation Analysis also contains a **SWOT analysis**, a summary of the Strengths, Weaknesses, Opportunities and Threats that Cape Town as a tourist destination needs to be aware of.

1.3.2 Tourism Spatial Framework

The tourism spatial framework describes the **spatial roles** that different places fulfil when tourists visit the city. For example, some places are the 'entrance gates' to the city or parts of the city, others are places where people stay over and use as a base to visit other areas, and so forth.

The tourism spatial framework also identifies **Tourism Development Areas** throughout the city. Each area has a distinctive character in terms of types of tourism products and resources found there, the types of tourist experiences currently offered, the potential to develop new products and the characteristics of the population of the area.

The Tourism Spatial Framework provides **recommendations** regarding the actions that can be taken in each Tourism Development Area in order to:

■ increase the attractiveness of the area by developing unique products and experiences that build on the resources of the area;

■ make it easier for tourists to get to and move around the area; and

■ help local people to develop tourism businesses and share in the benefits of tourism.

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1.3.3 Tourism Investment and Implementation Framework

The key objective of the TIIF is to identify activities and projects which can be placed into budgeting and business planning processes and capital expenditure programmes. The Implementation and Investment Framework details the actions that have to undertaken to achieve specific outputs for each of the goals. The framework also identifies the indicators to be used to measure the accomplishment of the actions, and indicates the party/s with lead responsibility for implementation. Indicative timeframes are also provided as a basis for detailed business planning.

The TIIF focuses on the role of the Branch: Tourism Development, Directorate of Economic Development and Tourism and various units of the City Administration. There are other parties involved in tourism initiatives both at a government and para-state level, but it is not their "core" business. There needs to be leadership and direction. The Branch: Tourism Development is the designated "champion" and catalyst for delivery. It must act as a conduit bringing together all relevant and interested parties.

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2 The consultative process

2.1 Background

This document outlines the approach, process and outcomes of the public communication and participation process for the Tourism Development Framework for the City of Cape Town.

Although public participation was not a legal requirement in this planning process, the project team recognised the importance of stakeholder involvement in the successful execution of the planning process and implementation. The following potential benefits of a participatory approach were identified:

- participation assists in establishing of a sense of ownership amongst stakeholders;

- participation can generate commitment to implementation in stakeholders;

- participation lends credibility to an organisation and process that is open to stakeholders' suggestions and opinions;

- participation helps to identify and resolve concerns before they turn into major problems; and

- countering undue expectations regarding the deliverables and outcomes of the process.

2.2 Stakeholder identification

The following questions were considered in the preparation of a stakeholder list:

- Who is responsible for the implementation of recommendations?

- Who is likely to mobilise for or against project recommendations?

- Who is potentially affected by the project and who are the representatives of those potentially affected?

- Who is likely to be interested and who are the representatives of those potentially interested?

- Who can contribute technical resources?

- Who can contribute knowledge and information?

- Who were previously disadvantaged and may require support?

- Who are influential figures and have local knowledge?

- Who are experts on expected key issues?

The following stakeholder groups were identified:

Internal	External
City Council	Other spheres of government
City of Cape Town officials	Statutory bodies and parastatals
Local Tourism Bureau staff	Private sector: Tourism and related industry
	Private sector: General business
	Private sector: Small business & emerging entrepreneurs
	Civil society

2.3 Stakeholder communication

2.3.1 Introduction

The participatory process consisted of the following main components:

■ establishment of a representative Technical Steering Committee

■ targeted communication with stakeholders

■ public meetings

Figure 1.1 illustrates the participatory process followed.

2.3.2 Technical Steering Committee

The project team convened a Technical Steering Committee with representatives from different branches of the city administration, as well as provincial and national government departments and organisations that have a role in tourism development in the city. The steering committee consisted of the following organisations:

■ CoCT: Economic Development - Tourism Development, Key Sectors, Investment & Promotions, Specialist Support

■ CoCT: Environmental Management

■ CoCT: Health

■ CoCT: Open Space and Conservation

■ CoCT: Spatial Planning

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- CoCT: Transport Planning
- COCT: Public Transport
- CoCT: Emergency Services
- CoCT: Disaster Management
- CoCT: Community Facilities
- Western Cape Nature Conservation Board
- South African National Parks
- Western Cape Provincial Government: Economic Development and Tourism
- Western Cape Provincial Government: Cultural Affairs
- SACCAWU
- Prof D. Dewar – University of Cape Town (Review Consultant)
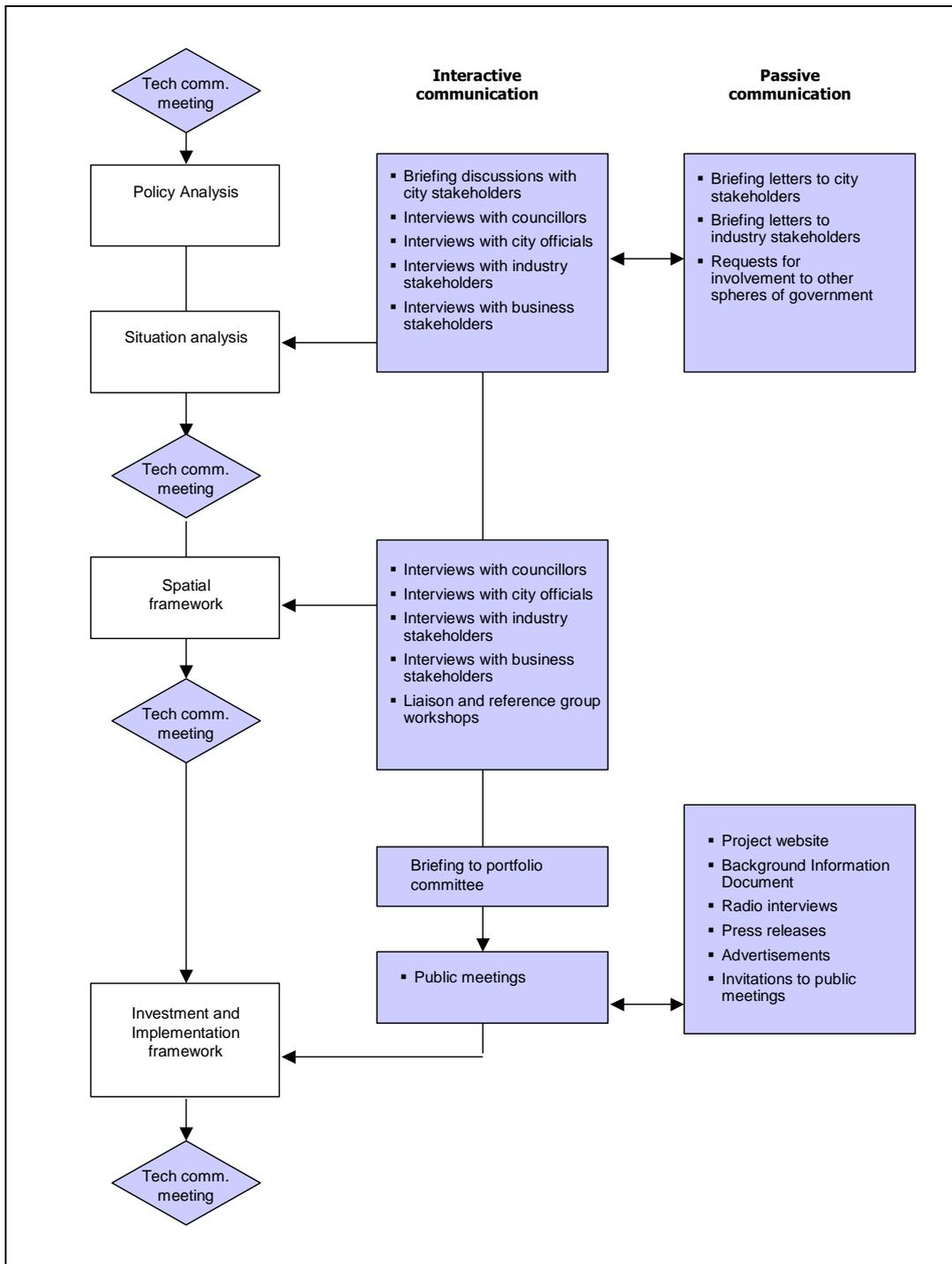
Figure 1.1 Cape Town Tourism Development Framework Process

2.3.3 Targeted consultation with stakeholders

Meetings were held with a range of stakeholders, e.g. Local Tourism Bureaux, Chamber of Commerce, in order to obtain their opinion about tourism development in Cape Town. In addition, working sessions were held with stakeholder forums in order to explore specific issues in more detail.

2.3.4 Public meetings

During the period 10 – 21 September eleven (11) public meetings were held at various locations across the metropole. A total of 121 Capetonians attended the public meetings.

Various media was used to communicate the process to the public.

- Background Information Document (summary of Tourism Development Framework) (Appendix A) prepared and distributed;
- Project website (www.capetown.gov.za/econdev/tourismdev) developed to provide access to all project documentation;
- Dedicated e-mail address (tourismdev@capetown.gov.za) established as channel for public comment;
- Press releases were issued to local radio stations and newspapers;
- Information talks were given on local community radio stations; and
- Summaries of the framework were distributed at every workshop/meeting, to libraries and tourism bureaus.

2.3.5 Issues arising from public meetings

The issues arising from the public meetings are summarised below:

1. Spatial imbalances in distribution of tourism in metropole
2. Need to bring planning for different economic sectors together in Integrated Development Strategy
3. Confusion regarding institutional roles and responsibilities
4. Requirement for community involvement in planning, decision-making
5. Need for 'accessible' tourism development support function, i.e. close to communities
6. Training, skills-building, educational programs
7. Requirement for tourism awareness throughout society – schools, CBOs, youth groups
8. Business development support: advice; mentorships; partnering with established business
9. Industry transformation – ownership patterns, industry attitude

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10. <u>Market-based development: understanding the markets we want to attract</u>

11. <u>Funding, resources and political will for implementation</u>

12. <u>Multitude of opportunities for partnerships</u>

Specific comments raised verbally at the public meetings or in written submissions received by the project team are reflected in a separate comment report.

3 Tourism vision and policy guidelines

3.1 Tourism vision

During 2000, the city developed the following overall vision for tourism, which was incorporated in the City's Economic Development Framework.

Cape Town tourism vision

To position Cape Town as a world-class competitor and South Africa's premier tourism and events destination and to maximise the economic spin-offs and jobs created.

The following broad strategic objectives were also identified:

- support the development of internationally known tourism icons attracting increased visitor numbers, and resulting in job creation and other economic spin-offs;

- spread the benefits of tourism through creating empowerment opportunities in the industry; and

- ensure the fundamental conditions are in place for an efficient and productive business and visitor environment that will attract and encourage tourists to return.

The principles, goals, strategic objectives and strategies of the Tourism Development Framework, are based on this vision and strategic objectives.

3.2 Policy principles

The Tourism Development Framework has been developed in the context of the Western Cape government's economic growth and development strategy (DEAAT 2000), the Western Cape's White Paper on Sustainable Tourism Development and Promotion (2001) and the City of Cape Town's Economic Development Strategy (2001).

The following Policy Principles underpinning the Tourism Development Framework are aligned with the afore-mentioned policy frameworks:

Sustainability

- Tourism will be underpinned by sustainable environment practices, respect for cultural values and contribute to sustainable livelihoods

- For tourism to be environmentally sustainable, the need to conserve and protect that which is of value must be balanced with the need to facilitate access at a level appropriate to the sensitivity of the area.

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- For tourism to be socially sustainable, host communities must actively participate in an ongoing way in its management, including the mitigation of its potentially negative effects such as environmental degradation, prostitution and abuse of drugs, alcohol and gambling.

- For tourism development to be economically sustainable, it should diversify opportunities, provide jobs and facilitate access to productive resources and Product development should be based on market requirements and trends

- For tourism to be institutionally sustainable, it should involve creative partnership between government, civil society and the private sector.

Social equity

- Tourism should benefit the population at large.

- Every effort should be made to encourage the participation of and benefit of women, the disabled, the youth and neglected or disadvantaged groups.

- The full spectrum of cultures inherent in the province should be reflected in tourism promotions.

- The potentially negative social impact of tourism should be minimised.

- Local people will participate in decision-making regarding the future of the destination

- Priority will be given to education and training

Environmental integrity

- The environment should be acknowledged as the cornerstone of the Cape Town tourism industry and environmental assets must be constructively developed to the benefit of tourism.

- The environmental impact of all tourism development plans must be carefully considered. Appropriate tourism strategies should be pursued in specific locations.

- All industrial, commercial, residential and agricultural development proposals must consider the potential impact on and conflicts with the potential for tourism growth. At the same time, tourism concerns should not necessarily take precedence over others.

- Spatial development plans and conservation efforts must take into account the tourism potential of the areas in question. Unique features should, as far as possible, be preserved.

- Visual, sound, water and air pollution must be limited and the effects of these hazards on tourists and the local population must be recognised.

Economic empowerment

- Tourism will be used as a development tool to enhance economic opportunities for local people

- Emerging entrepreneurs, in particular SMMEs, should be encouraged and facilitated to participate in the industry.

- Special efforts should be made to substantially facilitate participation and ownership in tourism among previously disadvantaged entrepreneurs.

<u>Co-operation and partnership</u>

- Partnerships between government, the private sector and local people will characterise the growth of tourism

- The government should guide the direction of tourism by providing the social, economic and environmental policy framework, public infrastructure, skills training, generic image and branding and a safe, well-maintained and sustainable environment that is conducive to tourism.

- The private sector should capitalise on the framework by investing in tourism and competing for a growing share of the tourism market, with increased profits.

- A motivated, skilled, adequately remunerated, protected and productive labour force should provide consistent, high-quality, world class service levels.

- The community at large should be encouraged to receive tourists in a hospitable manner and should be assisted to fulfil a watchdog role with regard to their resources.

4   Tourism Development Challenges and Goals

Cape Town must meet a range of challenges to develop tourism sustainably and remain competitive in the global marketplace. The challenges have been clustered into a set of eight strategic themes, and form the basis for the Tourism Development Goals:

Strategic theme	Tourism Development Goal
■ **Sustainability**: The long term future of tourism in Cape Town is linked to developing tourism in a way that respects and protects our natural, cultural and built heritages and lifestyles, and leads to improved livelihoods for Capetonians.	1) Protecting and conserving resources for a sustainable future and supporting sustainable livelihoods
■ **Market–driven product development**: Our efforts to develop new products must be based on an understanding of what our markets want and focus on the unique characteristics of the city.	2) Meeting visitor requirements through world class product provision
■ **Partnerships**: More effective partnerships and alignment are required between public and private sectors, between different spheres of government, industry and communities, etc. Alignment and sector efficiency is achieved through clear definition of roles and responsibilities, rationalisation of activities and avoidance of duplication.	3) Providing leadership and working in partnership
■ **Investment facilitation**: Private and public investment in tourism facilities and infrastructure, is the backbone of tourism development. An investment environment conducive to attracting investment in tourism and general commercial activity is a key challenge in this respect.	4) Facilitating investment and commercial activity for sustainable growth and economic prosperity
■ **People development**: For the tourism sector to succeed and contribute to the livelihoods of Capetonians it must be supported by appropriate strategies for the training and skills-building and economic empowerment of individuals and small businesses.	5) Investing in people for long term future

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- **Quality service and standards**: There must be close alignment between the promises made to visitors and the products delivered. This requires focus on accessibility, safety, cleanliness, service quality, information provision, citizen attitude etc.

  → 6) Delivering a world-class visitor experience through quality service and standards

- **Linking Destination marketing and Product development**: We must ensure that we meet and exceed the promises made in our marketing activities through suitable product development.

  → 7) Marketing Cape Town more effectively as a unique, vibrant, all year round destination

- **On-going and focused research**: Our future decisions about product development and marketing must be based on sound and accurate market research.

  → 8) Ongoing research and information provision to specific target audiences

Tourism in Cape Town is undergoing an intense period of change, and there is consensus within the industry that strong leadership is necessary. Product quality and service delivery are becoming increasingly important. Attracting tourists in a competitive market requires ingenuity and commitment. The challenge is to manage industry change in a way that supports transformation and continued strong growth and development, and equips the tourism industry for the ultra-competitive global environment in which it finds itself. The City of Cape Town is committed to working alongside partners in the industry to ensure that Cape Town's tourism development goals are achieved.

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5 Implementation framework

Goal 1: Protecting and conserving tourism resources for a sustainable future and supporting sustainable livelihoods

Component 1: Institutional strengthening

Component objective: To develop programmes to ensure the implementation of the guidelines for 'Responsible Tourism Development' as an integral component of the City's Tourism Development Framework

Outputs		Key accountabilities	Priority	Timing
Output 1.1 All functions of City Administration are able to support Responsible Tourism effectively	**Impact indicator**[1] The consideration of the principles of Responsible Tourism is evident in the decision-making of all relevant departments.	**Branch: Tourism Development** Environmental management Arts and culture Social development	High	2005

Component 2: Education and awareness

Component objective: To increase awareness and understanding of RT and promote the application of environmentally, culturally and economically responsible practices

Outputs		Key accountabilities	Priority	Timing
Output 2.1 Information and toolkits are provided to the private sector, NGO and CBO sector to enable effective support for Responsible Tourism	**Impact indicator:** Increased awareness of RT amongst roleplayers	**Manager, Branch: Tourism Development** Industry organisations SATSA, SAACI, SAARTG, FEDHASA, GHASA, etc	Medium	2005/2006
Output 2.2 The private sector adopts a Responsible Tourism Code of conduct/ Charter	**Impact indicator:** RT Code of Conduct applied by operator		Medium	2006
Output 2.3 A Pilot "paying for conservation/community projects" scheme, which seeks, through voluntary means, to generate funds from visitors to support community-based /environmental initiatives introduced	**Impact indicator:** Voluntary Contribution Scheme Revenue generated for project assistance	Branch: Tourism Development Environmental Management Open Spaces and Conservation	Low	2006

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[1] Impact indicators are used to monitor the overall change brought about as a result of the implementation of the Implementation and Investment Framework.

Output 2.4 Informational materials and guidelines on responsible procurement/purchasing are prepared for industry and consumer use	**Impact indicators:** No of FTT certified businesses Percentage of goods and services procured locally Value (Rand) of locally procured goods and services as % of overall procurement	**Director, Economic Development and Tourism** **Branch: Tourism Development**	High	2005
Output 2.5 Informational materials and guidelines on the benefits of the protection of the quality of the destination are prepared for public and community use	**Impact indicators:** Changes in resident attitude towards attractiveness of environment for tourists	**Tourism Development Branch**; Environmental Management Marketing & Communications Media partners	High	**2005**
Output 2.6 Code of conduct for visitors to Cape Town is prepared and distributed	**Impact indicator:** Awareness of Code of Conduct amongst visitors	Branch: Tourism Development	Medium	2005
Output 2.7 Opportunities for 'volunteer tourism' developed and publicised	**Impact indicators:** No of volunteer tourists Monetary value of contribution	**Branch: Tourism Development** Destination Marketing Organisation	Low	2005 onwards
Component 3: Impact assessment and management				
Component objective: To manage the impact of tourism on communities, culture and the natural environment within the framework of RT				
Output 3.1 Impact assessments for proposed tourism-related development are prepared taking account the principles of Responsible Tourism	**Impact indicator:** No of EIA reports reflecting guidelines (as percentage of relevant EIA reports)	**Branch: Tourism Development** **Environmental Management** **Spatial Planning**	Medium	2005 onward

Output 3.2 Assessments of the impacts of tourism in honeypot/sensitive locations are conducted in order to determine constraints in terms of infrastructure capacity, resident impact and tolerance, environment carrying capacity, etc. and management plans prepared	**Impact indicator:** Improved resident opinion regarding impact of tourism on communities Improved resident opinion regarding participation in decision-making	Branch: Tourism Development **Environmental management** **Community Development**		High	2005 – 2006

Component 4: Measurement and monitoring	

Component objective: To effectively report on progress towards Responsible Tourism to stakeholders in order to recognise contribution or motivate renewed effort.	

Output 4.1 Regular progress reports prepared and publicised	**Impact indicator:** Responsible Tourism barometer published	**Branch: Tourism Development** Environmental management	High Medium	2005 – 2006
Output 4.2 City-wide Responsible Tourism Awards programme launched	**Impact indicator:** No and quality of enterprises entering awards programme	**Manager, Branch: Tourism Development**	Medium	2005

Goal 2:   Meeting visitor requirements through world class product provision

Creatively develop and bundle products and services, building on destination strengths (heritage and culture, natural environment, coastal location, Mediterranean climate) into tailored experiences that match the needs, expectations and aspirations of Cape Town's potential customers, including the most profitable prospect

Component 1: Product Development Support

Component objective:

To encourage the development of products appropriate and competitive for target markets, in a manner that creates rewarding and enriching experiences for visitors to Cape Town and fosters partnerships between industry members.

Outputs		Key accountabilities	Priority	Timing
Output 1.1 A cluster-based product development approach is adopted	**Impact indicator:** Product development clusters established	Branch: Tourism Development DMO: Product Development	High	2005
Output 1.2 A Cultural and Heritage Tourism Development and Marketing Plan and Programme of Action is adopted so as to ensure that strengthen the unique elements of Cape Town's culture, heritage and lifestyles in brand positioning and product development	**Impact indicators:** Cultural and Heritage Tourism Development and Marketing Plan and Programme of Action adopted	**Branch: Tourism Development** Arts & culture	High	2005
Output 1.3 A programme of actions aimed at 'telling the story of the city's history and heritage' and creating a sense of place in neighbourhoods and TDAs is implemented.	**Impact indicator:** Visitor and resident awareness and use of facilities and infrastructure created under programme	**Branch: Tourism Development** **Spatial Planning** **Urban Conservation** **Historical Societies** **Western Cape Dept of Cultural Affairs** **Iziko Museums**	Medium	2005/6
Output 1.4 A programme of actions aimed at celebrating the city's contemporary arts and heritage is implemented.	**Impact indicator:** Visitor and resident awareness of Cape Town's contemporary arts and heritage	Branch: Tourism Development Spatial Planning Arts & Culture\	Medium	Ongoing

		CT Convention Bureau		
		SAACI Western Cape		
Output 1.5 A Nature-based and Adventure Tourism Business and Marketing Plan is adopted.	**Impact indicator:** Adoption of Nature-based and Adventure Tourism Business and Marketing Plan	Branch: Tourism Development Product Development Alliance DMO: Product development	Medium	2005
Output 1.6 A programme of actions aimed at showcasing the area's natural environment and heritage is implemented.	**Impact indicator:** Visitor and resident use of, and appreciation for, Cape Town's natural environment	Branch: Tourism Development DMO: Visitor Services **South African National Parks** **COCT: Nature Conservation** **DMO: Product development**	High	2005
Output 1.7 A programme of actions aimed at enhancing the visitor's experience and understanding of CT as coastal city is implemented.	**Impact indicator:** Visitor appreciation of Cape Town's coastal assets	Branch: Tourism Development Environmental management Spatial Planning SANPARKS COCT: Nature Conservation DEAT: Marine and Coastal Management	Medium	2005/6
Output 1.8 A Wine and Cuisine Tourism Development and Business Plan with structured programme of actions are adopted.	**Impact indicators:** Awareness of wine and cuisine experiences amongst operators and tourists Visitor use of wine and cuisine experiences Visitor satisfaction rating of wine and cuisine experiences	Branch: Tourism Development DMO: Product development CT Convention Bureau DMO: Product development Market gardeners WC Dept of Agriculture Cellar operators Visitor information centres	High	2005

Goal 3:   Providing leadership regarding Tourism Development in the City of Cape Town and work in partnership

Component 1: Institutional strengthening

Component objective:

To develop the City's capacity to provide leadership in the implementation of the Tourism Development Framework

Outputs		Key accountabilities	Priority	Timing
Output 1.1 Financial plan and budget for programme implementation prepared and adopted	**Impact indicator:** Financial resources allocated	Manager, Branch: Tourism Development Director, Economic Development and Tourism	High	Second half 2004
Output 1.2 Human Resource Plan for Tourism Development Programme implementation prepared and adopted	**Impact indicator:** **Human resources allocated**	Manager, Branch: Tourism Development Director Economic Development and Tourism	High	Second half 2004
Output 1.3 Additional Tourism Development staff recruited, Project managers appointed and operational budgets provided through departmental budget	**Impact indicator:** **Additional staff recruited**	Manager, Branch: Tourism Development Director Economic Development and Tourism	High	2005
Output 1.4 Training needs of staff identified and staff trained in technical and extension skills	**Impact indicator:** **Staff upskilled**	Manager, Branch: Tourism Development	High	2005
Output 1.5 The establishment of a Special Purpose Vehicle intended to manage the development and implementation of major tourism development projects is investigated	**Impact indicator:** Viability assessment	Manager , Branch: Tourism Development	High	2005
		Director, Economic Development and Tourism	High	2005

Component 2: Partnership with Destination Marketing Organisation				
Component objective: To build effective partnerships between marketing and development functions and provide clear direction about who is responsible for which activities and functions and develop mechanisms to ensure functional alignment				
Outputs		**Key accountabilities**	**Priority**	**Timing**
Output 2.1 Information sessions outlining roles and responsibilities of DMO and City relative to Tourism Development conducted.	**Impact indicator:** Awareness and understanding of roles and responsibilities	Manager, Branch: Tourism Development Director, Economic Development and Tourism	High	Second half 2004
		DMO: Product development	High	Second half 2004
Output 2.2 Informational materials on the Tourism Development function of the CoCT is prepared for industry, public and community use.	**Impact indicator:** Awareness and understanding amongst industry, public and communities of roles and responsibilities	Branch: Tourism Development	High	Second half 2004

Goal 4:	Facilitating investment and commercial activity for sustainable growth and economic prosperity				

Component 1: Institutional strengthening

Component objective:

To ensure that government takes into account the employment and economic contribution of tourism when setting priorities for infrastructure development

Outputs		Key accountabilities	Priority	Timing
Output 1.1 Relevant information regarding the impact of tourism is provided to all divisions of the City Administration	**Impact indicator:** Reliability, accuracy and availability of information regarding economic impact of tourism	Branch: Tourism Development Universities and Technikons	High	2005/2006
Output 1.2 All functions of City Administration are able to support the development of tourism effectively	**Impact indicator:** "Whole of government" awareness of role in implementation of Tourism Development Framework	Branch: Tourism Development CoCT: Open Space and Conservation Spatial Planning Transport Community Facilities Environmental management	High	2005

Component 2: Transport infrastructure development support

Component objective:

To enhance transportation access to the destination, and to tourism areas and attractions in the city

Outputs		Key accountabilities	Priority	Timing
Output 2.1 A Tourism Transport Action Plan for Cape Town is developed	**Impact indicators:** ■ Visitor satisfaction rating of public transport ■ Air capacity from key source markets to Cape Town	**Branch: Tourism Development** **CoCT: Transport**	High	Second half 2004

Component 3: Infrastructure development support

Component objective:

To ensure that a conducive environment for private sector operations is created through public sector investment in infrastructure (e.g. facility signage, street and landscaping, public amenities) and public services (e.g. policing, cleansing) in supporting tourism operations and that planning processes are responding appropriately to industry needs

Outputs		Key accountabilities	Priority	Timing
Output 3.1 Infrastructure which supports product and market development is in place	Impact indicator: Greater local government commitment, indicated by increased or longer term commitment to funding	Branch: Tourism Development	High	2005 – 2009
Output 3.2 Infrastructure investment supports the economic development of communities is in place	**Impact indicator:** Awareness amongst councillors	Manager, Branch: Tourism Development Councillors	High	2005
Output 3.3 To ensure that the destination preconditions of safety and cleanliness are in place	**Impact indicator:** Visitor satisfaction rating of safety and cleanliness	Branch: Tourism Development	Medium	On-going

Goal 5: Investing in people in order to ensure that marginalized Capetonians are enable to participate in and are partners in the tourism sector, thereby contributing to the transformation of the industry.

Component 1: Research, planning and monitoring

Component objective: To develop City's understanding of the capacity-building and transformation challenges of the industry in Cape Town

Outputs		Key accountabilities	Priority	Timing
Output 1.1 Surveys are carried out to establish resident opinions regarding tourism and a data base established.	**Impact indicator:** Availability of information regarding resident attitudes to tourism	Branch: Tourism Development Universities & technikons Colleges Private training providers	High	2005
Output 1.2 A Tourism Education and Training Action Plan prepared	**Impact indicators:** ■ Relevance of education and training to industry needs ■ Competency levels of graduates ■ Industry absorption of graduates ■ Partnerships between providers and industry	THETA Western Cape Dept of Economic Development and Tourism	High	2005
Output 1.3 Regular reports regarding the employment contribution of tourism activity are published	**Impact indicator:** Availability and accuracy regarding employment contribution of tourism	Economic Development and Tourism	High	2005

Component 2: Institutional strengthening				
Component objective: To strengthen the capacity of the City to support the transformation of the industry				
Outputs		**Key accountabilities**	**Priority**	**Timing**
Output 2.1 The City is able to serve the needs of SMEs through appropriate resources and systems required to perform business support function	**Impact indicator:** Service satisfaction rating of clients	Manager, Branch: Tourism Development Economic Development and Tourism	High	2005
Component 3: Training and capacity-building				
Component objective: To improve the capability of people to enter into and work in the tourism industry				
Outputs		**Key accountabilities**	**Priority**	**Timing**
Output 3.1 Business support services aimed at improving business competence within the sector, and emerging entrepreneurs and SMEs in particular delivered	**Impact indicators:** ■ No of business start-ups ■ Percentage of black-owned tourism enterprises ■ Success rate of business start-ups ■ Profitability of enterprises ■ Confidence of business owners	Branch: Tourism Development Economic Development and Tourism Western Cape Economic Development and Tourism Tertiary institutions Industry	High	Ongoing

Component 4: Extension Services and Participatory structures				
Component objective: To establish enabling mechanisms and partnerships for information sharing, capacity – building and local level planning and decision-making				
Outputs		**Key accountabilities**	**Priority**	**Timing**
Output 4.1 City-supported extension established to deliver awareness creation and business development functions and support partnership formation	**Impact indicators:** ■ Citizen perception of accessibility of advisory services ■ No of partnerships established	Economic Development and Tourism Branch: Tourism Development	High	2005
Output 4.2 A 'Women in Tourism' networking cluster to address gender-specific tourism development challenges is established	**Impact indicator:** Participation of women in tourism industry	Manager, Branch: Tourism Development	Medium	2005
Output 4.3 A framework and programme for key stakeholders to raise their awareness of the significance of tourism is developed and implemented	**Impact indicator:** Citizen understanding of tourism	Branch: Tourism Development Schools Industry members	High	2005
Output 4.4 A framework and programme for consultations and participation and awareness creation of the Tourism Development Framework is devised and carried out	**Impact indicator:** ■ Citizen perception of the 'level of service' delivered by the Branch: Tourism Development ■ Councillor awareness of content of Implementation Framework	Branch: Tourism Development Sub-council co-ordinators CoCT: Libraries Tertiary institutions Schools	High	Ongoing
Output 4.5 Area-based tourism action plans are prepared	**Impact indicator:** Area-based tourism action plans in place	Branch: Tourism Development	High	Ongoing

Goal 6: Delivering a world-class visitor experience through quality service and standards				
Component 1: Service quality research and training				
Component objective: To enhance visitor experiences in Cape Town				
Outputs		**Key accountabilities**	**Priority**	**Timing**
Output 1.1 Cape Town's tourism operators provide a range of high quality experiences for their customers underpinned by professional business practices.	**Impact indicator:** Visitor perception of service levels	Branch: Tourism Development DMO Tertiary institutions Private training providers	High	On-going
Output 1.2 Visitor information centre staff provide fair and unbiased information	**Impact indicator:** Unbiased information provision		High	Ongoing
Output 1.3 Capetonians are hospitable to visitors	**Impact indicator:** Visitor **perception** of Cape Town's welcome		High	2005
Output 1.4 Tourist facilities and attractions to accommodate visitors with disabilities	**Impact indicators:** ■ **No of accessible facilities as % of overall supply** ■ **Satisfaction levels of disabled visitors**	Branch: Tourism Development	Medium	2005/5

Goal 7: Marketing Cape Town more effectively as a unique, vibrant, all year round destination

Component 1: Market segmentation and target marketing

Component objective: To target the right market segments for sustainable growth based on market intelligence

Outputs		Key accountabilities	Priority	Timing
Output 1.1 Destination Marketing organisations and tourism operators are able to develop effective marketing strategies based on specific market segments identified through consumer research	**Impact indicator:** Targeted marketing based on market intelligence	**DMO** Branch: Tourism Development Tertiary institutions	High	2005

Component 2: Marketing strategies and tactics

Component objective: To optimise the seasonal and geographic spread of tourists and to increase market share in identified markets

Outputs		Key accountabilities	Priority	Timing
Output 2.1 Strategies and tactics are put into place to increase the percentage of visitors that arrive outside the defined "peak season" whilst peak volumes are maintained	**Impact indicator:** Seasonality patterns	DMO	High	Ongoing
Output 2.2 Strategies and tactics are put into place to attract a greater share of the domestic market and Western Cape residents to Cape Town	**Impact indicators:** Market share of domestic market		High	Ongoing
Output 2.3 Traditional and online marketing media and industry distribution channels are used to increase consumer access to destination and tourism product information	**Impact indicator:** Satisfaction of end users with ability to access destination information	DMO	High	2005

Output 2.4	Impact indicator:	Branch: Tourism Development	High	Ongoing
Product development takes in place in marginal areas in order to increase the spread of visitors and the spread of tourism benefits	Geographical spread of tourism			

Goal 8: Ongoing research and information provision to specific target audiences				
Component 1: Research				
Component objective: To improve understanding of our customers through improved collection, exchange and dissemination of research				
Outputs		**Key accountabilities**	**Priority**	**Timing**
Output 1.1 Frameworks and processes to gather and communicate research intelligence to the tourism industry are put into place	**Impact indicator:** Availability, accuracy and relevance of market intelligence	Branch: Tourism Development DMO Tertiary institutions	High	2005

5.8 Priority strategic interventions

5.8.1 Introduction

The Investment and Implementation Framework identifies a range of actions which need to be undertaken over the next five years in order to ensure achievement of the Tourism Development Goals. Four areas of action can be lifted out as Priority Strategic Actions, to be addressed as first order actions immediately. The four areas of action are:

- Develop a work programme for implementation

- Building capacity for implementation in the Branch: Tourism Development;

- Addressing the co-ordinated delivery of development, and

- Resolving destination access and accessibility.

These priorities should be the focus of attention within the first year of implementation.

5.8.2 Developing a work programme and resource plan for implementation

The Implementation and Investment Framework indicates broad timeframes for implementation, as well as key roleplayers for identified actions. A number of strategies in the 2004-2009 Implementation Framework require a change of focus, rather than additional funding. The achievement of some strategies, however, will depend on increased funding for either once-off costs or to cover ongoing costs for activities. A detailed work programme and financial and resource plan and budget for programme implementation should now be prepared by the Branch: Tourism Development, taking into consideration budgets available and existing business plans for the 2004/2005 financial year.

Whereas the Branch: Tourism Development will be the principal implementer of some of the identified actions, various other activities require collaboration with other departments and organisations. Upon approval of the Tourism Development Framework, the Branch Tourism Development should communicate the content of the implementation framework to relevant departments and organisations. The Branch should also address the incorporation of joint activities into the budgeting processes and business plans of relevant departments and organisations through the establishment of a Cape Town Tourism Development reference group (Goal 4, Component 1 - Institutional strengthening, action 1.2.1).

Membership of the reference group should include:

- CoCT: Economic Development & Tourism
    - Tourism Development (convenor)
    - Business support
    - Strategic Economic Development Information and Research
    - Informal trading
    - Business areas improvement
    - Sector support

- CoCT: IDP co-ordinator
- CoCT: Environmental Management
- CoCT; Spatial Planning
- CoCT: Urban Conservation
- CoCT: Transport
- CoCT: Community Facilities
- CoCT: Emergency Services
- CoCT: Disaster Management
- CoCT: Health

Concerning joint action with organisations outside of the City of Cape Town, the Branch: Tourism Development should engage with the identified organisations in order to determine the most suitable 'vehicle' for implementation, e.g. inclusion into organisation's business plan, project-based working group, etc., as well as timeframes for implementation. Implementation partnerships with the following organisations are required:

- Department of Environmental Affairs and Tourism
- South African Heritage Resources Agency
- Western Cape Destination Marketing Organisation
- Western Cape Dept of Economic Development and Tourism
- Cape Town Partnership

- Western Cape Nature Conservation Board
- South African National Parks
- Department of Environment and Cultural Affairs
- Iziko Museums

The convening of a Cape Town Tourism Development reference group is required to facilitate the preparation of a work programme and resource plan for implementation.	2nd half 2004
Branch: Tourism Development to engage with organisations external to the City of Cape Town in order to establish implementation partnerships.	2nd half 2004

5.8.3 Building the capacity of the Branch: Tourism Development

This implementation framework seeks to identify the most effective response to the many challenges which need to be confronted by the City and industry. The five-year Implementation Framework will guide the activities of all staff, ensuring that the Branch: Tourism Development focuses on core business activities. The Branch currently consists of two professional staff members who are called upon by a wide range of internal and external stakeholders for representation on steering committees, assistance on projects and input into strategic planning processes. The Branch acknowledges that only a fraction of activities that this type of division in a world city should ideally be attending is currently addressed.

The successful implementation of the Tourism Development Framework will be dependent on building the capacity of the Branch through the recruitment and selection of staff with the required skills and experience to drive delivery. The staff network of the branch should make provision for 'extension officers' located in communities and directing the implementation of area-specific recommendations. Training and development activities will ensure that new and existing staff members have the skills to support the strategic direction.

The resourcing of the Branch: Tourism Development in terms of additional staff and adequate budget is regarded as the second step towards the implementation of the Tourism Development Framework. Achievement of Goal 3, Output 1.1. 1.3 within thesecind half of 2004 is required to set into motion the delivery of the Tourism Development Framework	**2nd Half 2004**

5.8.4 Co-ordinated delivery of development projects

The Branch: Tourism Development has in the past provided strategic input into various developmental projects, e.g. Lookout Hill. Due to an increase in the number and magnitude of projects, there is a growing need to look into a dedicated delivery and management mechanism.

The best option institutional arrangements, taking into consideration the conditions governing local authority funding and expenditure as well as overall direction in terms of the City's and provincial Growth and Development Strategies, need to be investigated.	**2005**

5.8.5 Transport infrastructure and services

The presence of adequate transport infrastructure is a pre-requisite of a developing tourism industry and an important base on which tourism plans and investment initiatives can be built. The availability of airlift to Cape Town is widely regarded as a constraint to the growth of the destination, whilst the lack of quality public transport links inhibits the spread of both tourists and residents within the destination.

5.8.5.1   *Air access*

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

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

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

In the short term, SAA is unlikely to expand its routes, new resorts are unlikely to be built and South African Tourism is unlikely to make a major difference given its marketing budget. The charter option must therefore be seriously considered. Tour operators package charter flights along with accommodation and ground handling services. The flight is not scheduled and the plane is under control of the charter company. The City of Cape Town and Western Cape Province should take the lead in developing a charter programme, perhaps together with the Eastern Cape. The combination of Cape Town, Garden Route and Addo would appear to be an attractive package tour. Alternatively initial emphasis could be placed on Cape Town as a single destination.

5.8.5.2   *Public transport*

World class destination cities, such as Melbourne, Sydney, London, Barcelona, feature convenient public transport systems providing ease of access to major attractions and destination areas for tourists. These systems are designed to serve the commuter needs of residents first, with tourists being a secondary user group. Cape Town's public transport network is characterised by degraded infrastructure, inconvenient service schedules, inadequate safety and cleanliness. These characteristics impact negatively on regular commuters and the majority of tourists do not perceive the available public transport services as an option to move around within the destination.

The City has embarked on a project-driven and outcomes-oriented Mobility Plan. Consultation with divisions across the City Administration has been limited due to a fast-track approach. Although the need for rapid delivery is recognised, the input of stakeholders with a direct stake in improved transport services should not fall by the wayside.

There is a need for constructive engagement between the Branch: Tourism Development and Transport regarding the Mobility Plan in general and the resolution of the provision of specific public transport links in particular.	**2nd half 2004**

5.9 Conclusion

As Cape Town enters this second phase of its evolution as a destination for tourism and commerce, there is mounting pressure on tourism to deliver on its promises of economic empowerment and job creation. There must be a realisation that tourism is not the solution to all social and economic problems facing either South Africa or Cape Town. It is a highly competitive international business with high economic and social stakes. Being competitive is a requirement. An integrated tourism development framework that provides leadership and direction is an important step toward the implementation of many existing and planned initiatives and the overall delivery of tourism in the city. Success will be measured by delivery not rhetoric.