Culture and Heritage Tourism Strategy and Action Plan for Cape Town

City of Cape Town

PHASE 2: Situation Analysis

FINAL REPORT

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(Please reference source if any part of this document is used)

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1   Introduction

1.1   Background

The City of Cape Town has formulated a Tourism Development Framework that focuses on key tourism areas essential to the future development and positioning of Cape Town as a world-class tourism destination with a competitive edge.

Recognising that Cape Town's attraction as a visitor destination is largely based on its unique cultural and heritage resources, and that the diversity of cultures, lifestyles, heritage and environments sets it apart from many other cities, the Tourism Development Framework (2005) identified culture and heritage as one of the five key niche markets for Cape Town. The Niche Market Study (City of Cape Town, 2011) confirmed the importance of the niche market for destination Cape Town. EDGE Tourism Solutions was tasked by the City of Cape Town to prepare a Cultural Heritage Tourism Strategy and an Action Plan to support the expansion of this market.

1.2   The scope of this project

Figure 1 shows the areas of overlap and exclusion between natural and cultural heritage, and heritage and cultural tourism, annotated with examples of heritage resources in Cape Town for clarity.   The focus of this study falls mainly on tourism that relates to fixed historical or 'inherited' cultural resources. Temporary or occasional cultural heritage resources are included if these take place in fixed cultural heritage buildings or landscapes.

Figure 1   [Delineating cultural heritage tourism]

HISTORICAL PAST

CONTEMPORARY PRESENT

- 2 -

CULTURAL TOURISM

CULTURAL RESOURCES

HERITAGE TOURISM

District Six Museum

Castle Military Tattoo

The Old Town House

Spier "Infecting the City" Cape Town Jazz Festival

Robben Island

Blaauwberg Nature Reserve

Wolfgat Nature Reserve

The Cape Winelands

NATURAL RESOURCES

Rondevlei Nature Reserve

Historic buildings housing exhibitions

Re-enactment of historical event in historical building

Contemporary performing arts events

Landscapes that illustrate the combined works of nature and humankind

Cultural heritage resources within protected natural environments

For the purposes of this project the scope and definition of heritage will include:

- **Heritage sites, places and cultural landscapes including**: declared World Heritage Sites, Grade1 (national) and Grade 2 (provincial) sites and Grade 3 (local) heritage sites and heritage areas, as defined in the NHRA, and included in the SAHRA database and local registers. This definition may include monuments, memorials, buildings and assemblages of building, streetscapes, heritage precincts, cultural landscapes, archaeological sites, routes, and other sites of cultural significance, at a variety of scales.

- **Places of interpretation and presentation including**: national, provincial, province aided, local museums and private, institutional and community museums, interpretation centres, visitor attractions and sites with interpretive signage.

- **Contemporary activities and events** that draw on or reflect elements of Cape Town's cultural and regional heritage including: festivals and performances

1.3   Purpose of the report

The project consists of five phases, being:

- Phase 1: Project initiation
- Phase 2: Status quo
- Phase 3: Policy Principles and guidelines
- Phase 4: Cultural Heritage Tourism Strategy
- Phase 5: Action Plan

This report reflects the output of the first component of the Status Quo Analysis. Figure 2 details the activities undertaken during this component of work:

Figure 2   [Phase 2 scope of work]

2   Cultural Heritage sector definition, descriptions and analysis

2.1   Introduction

The first task in Phase 2 entailed defining 'heritage', culture', the 'cultural heritage sector' and 'cultural heritage tourism' for purposes of this particular study. This section provides an analysis of various definitions – academic, practitioner and legal, and concludes with a delineation of the scope of 'cultural heritage' to be included in developing the strategy and action plan.

2.2   Defining heritage

2.2.1   *National Heritage Resources Act No. 25 of 1999 (NHRA)*

For the purposes of the Act, the national estate – our **heritage resources** - include:

- Places, buildings, structures and equipment of cultural significance;
- Places to which oral traditions are attached or which are associated with living heritage;
- Historical settlements and townscapes;
- Landscapes and natural features of cultural significance;
- Geological sites of scientific or cultural importance;
- Archaeological and paleontological sites;
- Graves and burial grounds, including:
  - Ancestral graves;
  - Royal graves and graves of traditional leaders;
  - Graves of victims of conflict;
  - Graves of individuals designated by the Minister by notice in the Gazette;
  - Historical graves and cemeteries; and
  - Other human remains which are not covered in terms of the Human Tissue Act, 1983 (Act No. 65 of 1983);
- Sites of significance relating to the history of slavery in South Africa;
- Movable objects, including:
  - Objects recovered from the soil or waters of South Africa, including archaeological and paleontological objects and material, meteorites and rare geological specimens;
  - Objects to which oral traditions are attached or which are associated with living heritage;
  - Ethnographic art and objects;
  - Military objects;
  - Objects of decorative or fine art;
  - Objects of scientific or technological interest; and
  - Books, records, documents, photographic positives and negatives, graphic, film or video material or sound recordings, excluding those that are public records as

defined in section 1(xiv) of the National Archives of South Africa Act, 1996 (Act No. 43 of 1996).

Without limiting the generality of subsections (1) and (2), a place or object is to be considered part of the national estate if it has cultural significance or other special value because of:

- Its importance in the community, or pattern of South Africa's history;
- Its possession of uncommon, rare or endangered aspects of South Africa's natural or cultural heritage;
- Its potential to yield information that will contribute to an understanding of South Africa's natural or cultural heritage;
- Its importance in demonstrating the principal characteristics of a particular class of South Africa's natural or cultural places or objects;
- Its importance in exhibiting particular aesthetic characteristics valued by a community or cultural group;
- Its importance in demonstrating a high degree of creative or technical achievement at a particular period;
- Its strong or special association with a particular community or cultural group for social, cultural or spiritual reasons;
- Its strong or special association with the life or work of a person, group or organisation of importance in the history of South Africa; and
- Sites of significance relating to the history of slavery in South Africa.

Further, the National Heritage Resources Act (NHRA) defines a heritage resource as "any place or object of cultural significance". It defines cultural significance as "aesthetic, architectural, historical, scientific, social, spiritual, linguistic or technological significance or value".

There is no definition of "cultural landscape" in the NHRA. However, in the City of Cape Town where iconic images and scenic experiences are closely linked to the cultural tourism experience, it is necessary to define and apply the notion of a cultural landscape. The World Heritage Committee has identified and adopted three categories of cultural landscape, ranging from (i) those landscapes most deliberately 'shaped' by people, through (ii) full range of 'combined' works, to (iii) those least evidently 'shaped' by people through qualities of association or for religious and artistic reasons(yet highly valued). ". The categories are identified as:

- "a landscape designed and created intentionally by man";
- an "organically evolved landscape" which may be a "relict (or fossil) landscape" or a "continuing landscape";

- an "associative cultural landscape" which may be valued because of the "religious, artistic or cultural associations of the natural element"[1]

2.2.2 UNESCO definitions of heritage

The broad definition of heritage as outlined in the UNESCO *Convention Concerning the Protection of World Cultural and Natural Heritage* (1972) includes:

- Monuments: architectural works, works of monumental sculpture and painting, elements or structures of an archaeological nature, inscriptions, cave dwellings and combinations of features, which are of outstanding universal value from the point of view of history, art or science;

- Groups of buildings: groups of separate or connected buildings which, because of their architecture, their homogeneity or their place in the landscape, are of outstanding universal value from the point of view of history, art or science;

- Sites: works of man or the combined works of nature and man, and areas including archaeological sites which are of outstanding universal value from the historical, aesthetic, ethnological or anthropological point of view.

- Natural features consisting of physical and biological formations or groups of such formations, which are of outstanding universal value from the aesthetic or scientific point of view;

- Geological and physiographical formations and precisely delineated areas which constitute the habitat of threatened species of animals and plants of outstanding universal value from the point of view of science or conservation;

- Natural sites or precisely delineated natural areas of outstanding universal value from the point of view of science, conservation or natural beauty.

The broad definition of heritage outlined in the UNESCO *Convention for the Safeguarding of the Intangible Cultural Heritage (*2003) includes:

- The practices, representations, expressions, knowledge, skills and traditions – as well as the instruments, objects, artefacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals recognize as part of their cultural heritage as may be expressed in, but not limited to, the following domains: oral traditions, local histories as well as language; rituals, performances and social practices; indigenous and local knowledge concerning nature, the universe and human environment, and traditional craftsmanship

2.2.3 Defining the heritage sector

Definitions of heritage in international and national policy documents are very comprehensive, and include both tangible and intangible natural and cultural heritage.

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[1] UNESCO (2005) Operational Guidelines for the Implementation of the World Heritage Convention UNESCO World Heritage Centre. Paris. Page 83.

Considering official definitions of the 'heritage sector' may shed further light on the scope of work.

Definitions of the heritage sector

"The heritage sector comprises museums (including art and other museums) and environmental heritage organisations (nature parks and reserves, zoological parks, aquaria and botanic gardens)". Australian Culture and Leisure classifications. (Australian Bureau of Statistics, 2001)

In the United Kingdom, the cultural heritage industry is defined as follows:

- Museums
- Archaeology
- Built Heritage
- Related Membership Organisations

(Creative & Cultural Skills, UK, 2009)

South Africa's Standard Industrial Classification (SIC) codes categorise the 'heritage sector' under the major group "Library, archives, museums and other cultural activities" under MAJOR 9: COMMUNITY, SOCIAL AND PERSONAL SERVICES.

Table 1   [SIC Codes related to the heritage sector]

9631   Library and archives activities
Includes a wide variety of documentation and information activities provided by libraries and archives. Activities of libraries of all kinds, reading, listening and viewing rooms, public archives, etc. This usually involves the organisation of a collection, whether specialised or not, the making of catalogues, the lending and storage of, e.g., books, maps, periodicals, films, records, tapes.
9632   Museum activities and preservation of historical sites and buildings
The operation of museums of all kinds such as art museums, museums of jewellery, furniture, costumes, ceramics, silverware, etc., natural history and science museums, technological museums, historical museums, including military museums and historic houses and all kinds of other specialised museums. Also included is the preservation of historical sites and buildings. 96320 Museum activities & preservation of historical sites & buildings 96322 Provision for management and operation of monuments, historical sites and buildings 96323 Management and operation of museum, cultural and heritage activities
9633   Botanical and zoological gardens and nature reserve activities
The operation of botanical and zoological gardens and of nature reserves including wildlife conservation, etc. 96333 Game parks, reserves incl. but not limited to wildlife, parks, zoological or animal parks and botanical gardens 96334 Activities of conservation bodies 96335 Wildlife conservation incl. wildlife, game, parks, game reserves, zoological establishments, botanical gardens etc

The delineation of the SIC categories to include both cultural and natural heritage resources under this sector is aligned with the UNESCO definition of heritage and SA's White Paper on Arts, Culture and Heritage. However, the City of Cape Town determined that the scope of this study excludes natural heritage.

2.3   Relevant policies and strategies

2.3.1   The World Heritage Convention

The *Convention Concerning the Protection of the World Cultural and Natural Heritage*, 1972, generally known as the World Heritage Convention, defines the kind of natural or cultural sites which can be considered for inscription on the World Heritage List. It sets out the duties of States Parties in identifying potential sites and their role in protecting and preserving them. By signing the Convention, each country pledges to conserve not only the World Heritage sites situated on its territory, but also to protect its national heritage. The States Parties are encouraged to integrate the protection of the cultural and natural heritage into regional planning programmes, set up staff and services at their sites, undertake scientific and technical conservation research and adopt measures which give this heritage a function in the day-to-day life of the community. State Parties are also

encouraged, amongst other things, to strengthen the appreciation of the public for World Heritage properties and to enhance their protection through educational and information programmes.

There are currently two World Heritage Sites in the City of Cape Town. Robben Island, inscribed in 1999, and the Cape Floral Region Protected Areas, inscribed in 2004. A further property, provisionally named, The Cape Winelands Cultural Landscape is included on the World Heritage Committee's Tentative List.

Importantly, for the purposes of this project, State Parties are also required to: "endeavour by all appropriate means, and in particular by educational and information programmes, to strengthen appreciation and respect by their peoples of the cultural and natural heritage" and "shall undertake to keep the public broadly informed of the dangers threatening this heritage". (Article 27)

It is generally accepted that the management of tourism at World Heritage Sites is aligned with the International Council on Monuments and Sites (ICOMOS) Charters, outlined below. A guidance document, including the Managing Tourism at World Heritage Sites: a Practical Manual for World Heritage Site Managers (2002), and subsequent documents focus strongly on the issues of visitor management, carrying capacity and sustainability in relation to tourism.

2.3.2 *The World Heritage Sustainable Tourism Programme*

The overriding importance of tourism to World Heritage (WH), both as an opportunity or, if poorly managed as a threat, was recognised by the World Heritage Committee when it authorised the World Heritage Centre, in 2001, to develop the *World Heritage Sustainable Tourism Programme*.

This World Heritage Sustainable Tourism Programme encourages sustainable tourism actions at World Heritage sites. It develops policies and processes for site management and for the state parties to the Convention to address this increasingly important management concern. It implements actions to preserve sites for future generations and contributes to sustainable development and intercultural dialogue. It cooperates with WH Advisory Bodies, IUCN, ICOMOS and ICCROM, other United Nations Agencies such as UNDP and UNWTO and UNEP and engages the tourism industry to maximizes tourism's benefits and minimize its impacts.

The overall mission of the Tourism Programme is to aid the WH Committee and site management using tourism as a positive force to retain WH site values and to help mitigate site threats. The programme focuses on seven activities (which can also be applied to non-World Heritage sites). Namely;

- Building site **management capacity** to deal with tourism;
- **Training local community members** in environment and culture preservation and tourism related activities to receive tourism's benefits;
- Aiding communities around the sites to market their products and **use the World Heritage sites as a lever for local economic social and cultural development;**.

- Raising public awareness of outstanding universal values, or significance of the site, and **building pride and intercultural dialogue with local communities** and visitors through conservation education;
- Using **tourism generated funds to supplement site conservation** and protection costs;
- **Spreading the lessons learned** to other sites and protected areas and;
- Raising **awareness of the objectives of the World Heritage Convention**, other UNESCO conventions, activities and policies: for local and national public tourism authorities, tourism industry officials and tourists.

These activities accord broadly with other international conventions and charters dealing with sustainable and or responsible tourism.

2.3.3 ICOMOS International Cultural Tourism Charter, 1999

The *ICOMOS International Cultural Tourism Charter: Managing Tourism at Places of Heritage Significance*, 1999, provides an umbrella statement of principles to guide the dynamic relationships between tourism and places or collections of heritage significance. In addition to recognising the need to safeguard the enormous breadth, diversity and universal importance of cultural heritage, both tangible and intangible, the charter promotes two major concepts:

- making the significance of the site, or place, accessible to visitors and host communities in a well managed manner and;
- promoting cooperation between the conservation community and the tourism industry, especially given the fragility of the heritage resource.

The Charter sets our six principles to guide cultural heritage tourism:

- **Encourage Public Awareness**: Since domestic and international tourism is among the foremost vehicles for cultural exchange, conservation should provide responsible and well managed opportunities for members of the host community and visitors to experience and understand the community's heritage and culture at first hand.
- **Manage the Dynamic Relationship**: The relationship between Heritage Places and Tourism is dynamic and may involve conflicting values. It should be managed in a sustainable way for present and future generations.
- **Ensure a Worthwhile Visitor Experience**: Conservation and Tourism Planning for Heritage Places should ensure that the Visitor Experience will be worthwhile, satisfying and enjoyable.
- **Involve Host and Indigenous Communities:** Host communities and indigenous peoples should be involved in planning for conservation and tourism.
- **Provide Benefit for the Local Community**: Tourism and conservation activities should benefit the host community.
- **Responsible promotion Programmes**: Tourism promotion programmes should protect and enhance natural and cultural heritage characteristics.

The Charter notes that tourism can be a positive force for natural and cultural conservation but sounds a note of warning that excessive or poorly managed tourism and

tourism-related development can threaten the physical nature, integrity and physical characteristics of natural and cultural heritage and living culture.

2.3.4 *International Council on Monuments and Sites (ICOMOS) Charter for the Interpretation and Presentation of Cultural Heritage Sites, 2007*

The *ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites*, 2007 addresses: acceptable and appropriate goals for heritage interpretation; the principles which should underpin the technical means and methods appropriate in particular cultural and heritage contexts and; the general ethical and professional considerations that should help shape interpretation and presentation of heritage sites. In summary these include:

- **Access and Understanding**: Interpretation and presentation programmes should facilitate physical and intellectual access by the public to the site, facilitate understanding and appreciation for the site and foster public awareness of and engagement in the need for its protection and conservation.

- **Information Sources**: The meaning of the site should be communicated through interpretation and presentation based on evidence gathered through accepted scientific and scholarly methods, as well as from living cultural traditions.

- **Context and Setting**: The interpretation and presentation of the site should relate to its wider social, cultural, historical, and natural context and setting.

- **Authenticity:** The interpretation and presentation of the site must respect the basic tenets of authenticity in the spirit of the Nara Document (1994), communicate the significance of its historic fabric and cultural values, protect it from the adverse impact of intrusive infrastructure, visitor pressure, and inaccurate or inappropriate interpretation, and **safeguard the tangible and intangible values** of the site.

- **Sustainability**: The interpretation plan must be sensitive to its natural and cultural environment and promote public understanding of, and participation in ongoing conservation efforts.

- **Inclusiveness**: The interpretation and presentation of the site must be the result of meaningful collaboration between heritage professionals, host and associated communities, and other stakeholders.

- **Research, Training, and Evaluation**: Continuing research, training, and evaluation are essential components of the interpretation of the site.

2.3.5 *The UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage, 2003*

Cultural heritage does not end at monuments and collections of objects. It also includes **traditions or living expressions inherited from our ancestors and passed on to our descendants**, such as oral traditions, performing arts, social practices, rituals, festive events, knowledge and practices concerning nature and the universe or the knowledge and skills to produce traditional crafts

The *Convention for the Safeguarding of the Intangible Cultural Heritage*, 2003, requires that States that have ratified it safeguard living heritage on their territories and in

cooperation with others. The Convention affirms that the intangible heritage of all communities, whether they are large or small, dominant or non-dominant, deserves respect.

In terms of the Convention, safeguarding living heritage means taking measures aimed at ensuring the viability of intangible cultural heritage. This does not mean freezing its form, reviving some archaic practice, or creating multimedia documents for an archive. Rather, **safeguarding means trying to ensure that the heritage continues to be practised and transmitted within the community or group concerned**.

Communities must be actively involved in safeguarding and managing their living heritage, since it is only they who can consolidate its present and ensure its future. States that ratify the Intangible Heritage Convention are obliged to safeguard heritage through measures such as protection, promotion, transmission through formal and non-formal education, research and revitalisation, and to promote greater respect and awareness.

Note: South Africa has not yet acceded to this convention, but is preparing to do so.

2.3.6 *The City of Cape Town's Integrated Metropolitan Environmental Policy (IMEP)[2] Sectoral Policy on Cultural Heritage*

The City of Cape Town's *Integrated Metropolitan Environmental Policy*, 2005 outlines a vision for the environment, details policy principles and an implementation strategy. The policy sets out 14 sectoral approaches, including cultural heritage.

The *Cultural Heritage Strategy for the City of Cape Town*, 2004, proposes a consolidated and coordinated approach to the management of the cultural heritage of the City of Cape Town. It:

- sets a policy and framework for the management and protection of cultural heritage resources
- responds to the obligations placed on local government through relevant national legislation, i.e. the National Heritage Resources Act, 1999, and
- provides a framework for cooperation between the national, provincial and local spheres of government in respect of cultural heritage.

The IMEP outlines a vision for the effective management of the City's heritage resources, namely:

> *Cape Town is a unique historic city. It derives its character from a dramatic scene setting, its historical townscapes and cultural landscapes, it's cultural and heritage diversity and the traditions and memories that arise from its past.*

The IMEP articulates the City's commitment to the preservation, protection and enhancement of the City's diverse cultural heritage. This includes:

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[2] Cultural Heritage Strategy for the City of Cape Town: Integrated Metropolitan Environmental Policy adopted by the City of Cape Town in 2005.

- Recognising the rich cultural heritage of the City of Cape Town;
- Recognising all cultures and religions represented within the City of Cape Town and;
- Ensuring the inclusion of cultural values, sites, landscapes of historic significance, areas of scenic beauty and places of spiritual importance in planning and decision making.

The IMEP sets out a number of management objectives. These relate broadly to the identification, assessment, statutory protection, management and administration of the City's cultural heritage resource. Of particular relevance to the development of a heritage tourism strategy are the following:

- Objective 5: The City shall protect and enhance heritage resources through projects, interventions and incentives, and communicate the value of heritage to the public.
- Objective 6: The City shall communicate the value of heritage resources through education resource development, public projects, the media and the formation of partnerships with relevant groups.

The IMEP articulates a number of policy principles. These are summarised below.

- **Access**: Citizens should enjoy rights of access to public heritage resources as part of the common legacy of the historic city. Furthermore, "the City shall encourage access to heritage sites and ensure that such sites are appropriately marked and explained for public understanding".

- **Archaeology**: the City of Cape Town is rich in archaeological resources, which represents much of the undocumented history of Cape Town. Furthermore, "the City shall encourage the display and interpretation of archaeological resources".

- **Authenticity**: Each heritage resource reflects a unique expression resulting from a particular historical process. The original fabric of the heritage resource determines its value and can be read as an historical record reflecting its historical significance and cultural value.

- **Community participation**: Community participation in heritage is a vital part of sustainable heritage management. The communities of Cape Town have a key interest in heritage and an essential role to play in identifying and protecting heritage resources. Communities are valuable resources of knowledge, and partnerships between authorities and the public may empower both.

- **Context and Scale:** The social and landscape context of heritage sites is critical in the understanding and conserving of their significance. The context can be both social and spatial, taking into account both historical and contemporary perceptions.

- **Cultural diversity:** Heritage places and practices are identified and understood from diverse cultural perspectives. These may be contested or change over time. Furthermore, "The City will ensure that different readings and perceptions of heritage are acknowledged," and "The City will allow for cultural diversity and contestation, while seeking being representative of the broad range of places and practices that are meaningful to cultural groups and, "The City will ensure that the heritage environment is enriched by the cultural diversity of the communities of Cape Town though the encouragement of events and traditions; and the commemoration and

conservation of heritage sites and structures which represent the histories of many communities".

- **Cultural landscapes**: The City of Cape Town and surrounding areas are regarded as a unique and dramatic natural and cultural landscape. Within this landscape a wide variety of cultural landscapes can be identified which differ in scale and nature. They provide evidence of the City's history over time and contribute to a sense of place and identity. They provide dynamic reference points and positive instruments for growth and change. Furthermore, "the City shall ensure that the protection of the cultural landscape is enhances by recognising and giving value to the many layers of cultural significance resulting from the area's long history and prehistory", "The City will conserve the unique cultural landscape and scenic qualities of the region for the benefit of its inhabitants and for tourism" and, "the City will ensure the identification and appropriate management of such cultural landscapes as fundamental to the economy and well being of the City".

- **Development:** Growth and development are essential to the economic life of a city and its inhabitants. Heritage management should seek to work within and guide development, to protect heritage resources and to support economic growth.

- **Environmental sustainability:** heritage management needs to be sustainable to ensure access. To ensure a sustainable heritage environment, management should balance demands placed on the environment by people and commercial activities without reducing the capacity of the environment ro provide for itself and for future generations. Furthermore, " council shall meet the demands placed on the historic built environment and cultural landscapes without reducing the capacity of the heritage environment to provide for future generations and without limiting the opportunities for future changes in heritage values and meaning.

- **Heritage, tourism and economic growth:** Heritage resources are valuable economic resources, especially with respect to tourism. Attractive adaptive reuse of historic buildings, applied sensitively, can encourage investment and support economic growth while preserving and enhancing the unique character of the City. Furthermore, "the City shall encourage the use of heritage resources for job creation through tourism", "the City shall encourage the presentation of heritage sites and landscapes for tourism purposes', "the City shall encourage tourism-related activities that utilise historic resources and sites" and "The City shall encourage investment in adaptive reuse of historic sites, and discourage their demolition or inappropriate alteration".

- **Heritage significance**: Heritage management requires the identification and interpretation of heritage areas of significance and conservation. Furthermore, The City shall ensure the appropriate protection and enhancement of its heritage resources of cultural significance by, inter alia, "recognising the many layers of cultural significance resulting from the areas long history including the pre-colonial period; and the changing roles the city has played over time.

- **Integration**: To be effective, heritage decisions should be integrated into economic, environmental and planning processes.

- **Interpretation:** The value and significance of some heritage sites is not self- evident. They require interpretation to explain their significance. Interpretation may be multi-layered and even conflictual. Interpretation of the heritage of Cape Town and environs should acknowledge its often painful and oppressive past. Explanation of significance may be through appropriate processes involved in consultation, interpretation, markers, plaques and memorials. Furthermore, "The City will ensure that heritage sites are appropriately and accurately interpreted, to reach as many Capetonians and visitors as possible", "the City will ensure that heritage sites are appropriately marked and commemorated where necessary", "the City will ensure that interpretation is informed by appropriate academic research and public participation, including oral histories where necessary" and, "The City will ensure that interpretation, consultation and research inform the identification of cultural significance".

- **Tangible and intangible heritage:** Cultural value resides in both tangible and intangible heritage. Oral traditions, ceremonies, events and knowledge systems are a vital part of heritage. Intangible heritage enriches the experience of the physical environment through memory and knowledge. Living heritage is an integral part of contemporary experience and links social and individual memory to daily life.

- **Urban regeneration:** The restoration and reuse of historic structures is a catalyst in the urban regeneration of Cape Town. The management of heritage sites and structures is most successful when integrated into general conservation and development strategies for urban regeneration.

In summary, the IMEP links the scenic and cultural significance of the City and environs, the enriching qualities of cultural diversity of the area, its heritage and the potential for development and tourism growth.

Note: While the IMEP includes a number of points under each policy principles, only those that relate directly to cultural heritage tourism have been highlighted in this report.

2.4   Cape Town's cultural heritage resources

2.4.1   *Cultural heritage resource or cultural heritage tourism resource?*

The development of an appropriate and creative cultural heritage tourism strategy for the City of Cape Town requires a clear understanding of the nature and the extent of the cultural heritage resource base.

While the definitions of cultural heritage, noted earlier in this document suggest that the cultural heritage resource base should include both tangible and intangible elements such as heritage sites, places of interpretation and cultural practices, the question we should be asking is, ***what is it that turns a heritage or cultural resource into a tourism resource or attraction***?

Simply stated, heritage focuses on the aspects of individual, community and national identity and history, while cultural heritage tourism deals with the way in which history and culture is presented to and experienced by others.

The assessment of the tourism potential of a heritage or cultural resource relates to: the nature of the place or activity, the significance of the place or activity, the presentation or interpretation of the place or activity, the conservation and tourism contexts and the relationship between these. Questions that we have asked in assessing whether a heritage resource may also be classified as a tourism resource include the following:

- Is this resource or activity in the public domain?
- Is it physically and/or visually accessible to visitors?
- Is its significance interpreted or presented appropriately?
- Is it visitor ready, i.e. are the required facilities in place/can visitor facilities be created in order to convert a resource into an attraction?
- Does the resource present a well managed opportunity, i.e. does it have a management and visitor management strategy?
- Will tourism activity compromise the resource in any way?
- Does it meet the criteria for authenticity?
- Will it offer visitors an enjoyable and satisfying experience?
- Is it linked either thematically or spatially to other cultural resources?
- Does the cultural resource exhibit, celebrate and /or interpret notions of regionalism?

Heritage resources that meet the criteria defined above are also considered to be appropriate cultural heritage tourism resources.

2.4.2 *Analysis of cultural heritage tourism resources*

In this report we make a distinction between the following types of resources:

- Cultural heritage sites, landscapes, ensembles and precincts
- Sites of interpretation including museums, monuments or memorials
- Cultural heritage practices and traditions
- Tourism routes and tours which may include a combination of any of the above

2.4.2.1 <u>Cultural heritage sites, landscapes, ensembles and precincts</u>

The study has undertaken an audit of heritage objects, sites, groups of buildings, streetscapes, cultural tourism routes and cultural landscapes in the cultural tourism domain. The audit has also identified issues on a site by site basis of issues relation to access, location and interpretation.

Sites, identified as cultural heritage tourism resources have been included because they meet one or more of the following criteria:

- Historical social value
- Narrative value
- Ability to demonstrate
- Authenticity
- Aesthetic appeal

- Scenic

- Access (visual and functional)

- Regional qualities

Generally, successful tourism sites combine a number of criteria. They may provide experiential layers, ability to demonstrate an aspect of history, recreational activity and traditions, and regional scenic context. Some sites have powerful iconic significance, both in terms of the regional and national history, or powerful dramatic landscapes or significant architectural sites. It should be noted that the significance of cultural sites is not always self evident and needs to be appropriately interpreted.

Other significant cultural tourism sites may be of specialist or thematic interest. These may include military sites, sites associated with railway history or sports history; or sites of specific architectural and urban interest. However, because of the nature of the environment in places, such specialist sites may also be within the context of scenic environments or environments of human interest.

While tourism seeks out sites, narratives, traditions and events which combine the criteria of regionalism and authenticity, it is also true that excessive exposure, marketing and commercialism of such sites generated by tourism activity may eventually diminish and reduce their significance. Sites of cultural heritage tourism significance should therefore be carefully managed to ensure that development which ensues is appropriate to the significance of the site.

It must be noted that:

- Many heritage sites which may be of interest in terms of specialist themes i.e. In architecture, are privately owned and not open to the public nor are likely to be

- Some cultural sites which may be of interest to tourism carry cultural sanction which should be respected. These relate to dress code, codes of behaviour and gender issues

- Some sites are deemed 'sacred sites' and have been excluded from the list as they are not intended for visitation by tourists

- Routes may link heritage sites (i.e. through historical walks) but may also form the backdrop for traditions and festivities

- Sites may have little physical evidence of cultural tourism value but may nevertheless be of significant cultural value

- Local traditions in relation to cultural environment, particularly cultural landscapes, form a significant component of local identity and should not be overlooked. These include picnics, walks and promenades.

In regional environments such as Cape Town, with a strong scenic and environmental component, the lines between cultural and natural heritage have been hard to separate. It has therefore been necessary to adopt and inclusive approach which may be tightened at a later stage.

Buildings or ensembles of buildings in the public domain

Buildings or *ensembles* of buildings combine public and tourism access, visual interest, representivity, landmark status and proximity to other areas of tourism interest. They do not represent all heritage-related structures in the Cape Metropole.

Private homes and buildings which have no access to the public, and which are heritage resources were generally excluded unless they were visually prominent and formed part of a significant townscape.

Only landmark buildings or buildings of intrinsic significance for tourism have been included. For others, see "Townscapes and streetscapes". A number of significant heritage buildings function as museums and are listed as both.

Sites of significance and tourism interest including known archaeological sites of cultural significance.

These are relatively undeveloped sites with narrative experiential and historical interest - "Ability to demonstrate". These include significant burial grounds, sites of military battles, caves of historical/cultural significance and entire (generally open) spaces which reflect the history of the metropolitan area e.g. District Six, Green Point Common, Freedom Square, Rondebosch Common, Blaauwberg Nature Reserve, Peers Cave, Muizenberg.

Ensembles and Precincts of heritage tourism significance

An *ensemble* is a collection of cultural sites which are linked thematically or aesthetically; as well as collections of buildings over two or more, and which are of interest for tourism. It excludes streetscapes and townscapes which are defined at a broader scale.

A *precinct* is a defined and spatially legible place of cultural tourism interest. It includes architectural and historical interest; public open space and cultural landscape characteristics; and is within a generally pedestrian-friendly environment. These include significant cultural city spaces such as Greenmarket Square, Church Square, the Grand Parade, the Company's Garden, The Parliamentary Precinct, The Somerset Road Precinct, the Welgelegen Mostert's Mill Precinct, Groote Schuur Estate, the Mamre Mission historic core and many of the historic wine farms, their werfs and landscape contexts.

Cultural landscapes of significance and tourism interest

There are landscapes which combine scenic cultural and experiential qualities. They include the lower slopes of the Table Mountain National Park, the Constantia Winelands and aspects of the Cape Point Nature Reserve.

Themes

Key themes covered in the selection of heritage sites, ensembles and landscapes include:

- Struggle for democracy/apartheid legacy
- Landmark
- Military, battles
- Industrial History
- Heritage niche market

- Architectural including Early Cape, Georgian, Victorian, Arts and Crafts, Art Deco, Modern Movement, Apartheid architecture, contemporary and post modern
- Scenic and contextual
- Places of worship
- Maritime
- Labour
- Science technology
- Amenity spaces parks and squares
- Cultural/recreational
- Commercial
- Environmental/ecological
- Regional historical
- National Historical
- Transport and historical transportations route

2.4.2.2 Sites of interpretation including museums, monuments or memorials

Museums and places of interpretation

Fifty-two museums or places of interpretation have been identified. These include World Heritage Sites, national institutions, local authority museums, private museums, community-based museums, museums belonging to societies or associations or attached to government or tertiary institutions.

The majority of the museums identified are located in the centre of the city or in the traditionally white suburbs such as Simon's Town, Fish Hoek, Durbanville, Newlands, Rondebosch, Somerset West and Hout Bay, with notable exceptions in Lwandle and Langa.

With a couple of notable exceptions, (Prestwich Memorial, District Six Museum, Lwandle Migrant Labour Museum and the Old Langa Pass Office and Court) museums are dominated by white colonial history. In recent years there has been an upsurge of interest in slave history. This is reflected in the attention which has been given to it in several museums. Iziko's Slave Lodge acknowledges the role of slaves in the life of the city. Groote Constantia, for example, while focusing on the way of life of the colonial settlers, incorporates information about the slaves who lived and worked on the farm. Vergelegen deals similarly with slave history. Smaller museums including the Bo-Kaap Museum, the Simon's Town Museum and the Heritage Museum (Amlay House) also incorporate the history of slaves and others who came to Cape Town from the East.

The District Six Museum, with its focus on the history of forced removals, narrates a particular chapter in Cape Town's history. Similar stories are told to a lesser degree in other museums.

The history and heritage of the city's black residents is largely invisible in the city's museums.

Notwithstanding the critical deficits noted above, the city has a range of museums that may appeal to the diverse interests of cultural heritage tourists, as well as those with a more general interest in the city.

Themes covered by city's museums include:

- The history of viticulture and winemaking: Groote Constantia, Vergelegen
- Rugby
- Milling: wind and water mills
- The liberation struggle: Robben Island, Mayibuye Centre
- Local history: Hout Bay, Simonstown, Fish Hoek Valley, Goodwood, Parow
- Medical history: Cape Medical Museum, the Heart of Cape Town
- Slave History: The SA Missionary Museum, Iziko Slave Lodge, Prestwich Memorial
- Naval history: the Naval Museum, SA Maritime Centre, SAS Somerset, Mouille Point Light House
- African Gold: though very little information about South Africa's heritage is included
- Music
- Islamic culture: The Heritage Museum, The Bo-Kaap Museum
- Fish Hoek Valley Museum
- Archaeology/early inhabitants: Iziko South African Museum, Fish Hoek Museum, Simon's Town
- Dutch colonial history: Het Posthuys
- Military History: Castle of Good Hope, SA Airforce Museum; Chavonnes Battery
- Forced removals: District Six Museum, Simon's Town Museum
- Visual Arts: Iziko South African National Gallery, Michaelis Collection/ Old Town House
- Natural history: Iziko South African Museum
- Migrant labour: Lwandle Migrant Labour Museum
- Cape Town: Koopmans de Wet, Rust en Vrede
- Mission History: Mamre Moravian Mission Station; SA Mission Church
- Jewish history: SA Jewish Museum, Cape Town Holocaust Centre
- **Sacred Sites: Kramat of Sheik Yusuf, for example, have, in principle, been excluded from the list as they are not intended to be tourist attractions.**

Monuments and memorials

Monuments and memorials include large-scale public facilities like Rhodes Memorial, urban features such as fountains and bridges, monuments commemorating individuals or events (including several related to the City's struggle history), and war memorials.

2.4.2.3 Intangible cultural heritage

Intangible history, i.e. "the practices, representations, expressions, knowledge, skills and traditions – as well as the instruments, objects, artefacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals recognise as part of

their cultural heritage as may be expressed in, but not limited to, the following domains: oral traditions, local histories as well as language; rituals, performances and social practices; indigenous and local knowledge concerning nature, the universe and human environment, and traditional craftsmanship".

While intangible elements contribute significantly to Cape Town's identity and sense of place, the use of this resource for cultural heritage tourism has to be managed with particular sensitivity, except under clearly defined circumstances: where it is embodied: in places of interpretation, for example Groote Constantia, or Kalk Bay Harbour; sites of interpretation, for example the Bo-Kaap; included in tours offered to visitors, for example, township tours or; in public festivals and events, for example, the Minstrel Carnival.

- The Groote Constantia and Vergelegen wine estates comprise a number of inter-related components including interpretative exhibitions, historic buildings, displays of historic artefacts, gardens or agricultural fields and wine-making facilities. Visitors to these estates are offered the full experience, including cellar tours, opportunities to taste the wine and enjoy traditional cape cuisine.

- A visit to Kalk Bay Harbour, situated in the historic fishing district, offers opportunities to engage with fishermen and -women, watch and purchase fish from the quay-side or enjoy a meal in one of several restaurants. To some extent, this offers visitors an insight into the history of the area, but, more importantly, it offers an opportunity to interact with local people.

- Tours of the Bo-Kaap cover the architecture of the area, sacred sites - cemeteries and mosques, places of interpretation such as the Bo-Kaap Museum, visits to artists' workshops, and opportunities to enjoy typical Cape Malay fare.

- Township tours typically involve visits to sites of historic interest, arts and crafts studios or projects, traditional healers and opportunities to enjoy a meal in a tavern or shebeen.

- The Cape Town Minstrel Carnival, and the New Year's Eve march through the city is a tradition which has its history in slavery, but has continued and grown to become the highlight of the city's New Year festivities for residents and visitors alike.

Properly managed, the tourism and travel industry can bring substantial benefits on both a macro- and local level to the sustainability of intangible cultural heritage. It may bring revenue to enhance and safeguard heritage practices or to revitalise traditional industries. On a more human level, by bringing in revenue, tourism has the capacity to strengthen local people's self-respect, values and identity, thereby safeguarding aspects of their intangible heritage and enhancing their development potential.

While tourism has the potential to enhance and preserve the tangible and intangible cultural heritage on which it relies, if it is not managed and controlled, it can also degrade and irreversibly damage this very same valuable resource. There are countless examples of how cultural tourism, although potentially profitable in the short term, has damaged fragile historical and cultural resources, thereby undermining their value.

The challenge is to develop tourism that supports sustainable human development while simultaneously contributing to the safeguarding of living heritage.

2.4.2.4   Cultural heritage routes and tours

The potential for self-guided tours and interpreted routes has, with a few notable exceptions been under-utilised.

Self-guided walking tours and interpreted routes

These are routes, whether self guided or tour guided, or published, and using a variety of transport options which combine sites with a narrative thread. They include the central city slave route, the footsteps to freedom route, the military route, a variety of wine routes and physical scenic routes of cultural interest, such as Chapman's Peak Drive, the cableway to Table Mountain, and the Scenic Rail Route from Muizenberg to Simon's Town.

Interpretive signage has been erected in several areas to guide visitors and draw attention to aspects of its cultural and natural heritage. Areas where such signage may be found include: the Victoria & Alfred Waterfront, Table Mountain and The Fan Walk. A street side installation in Langa commemorates and presents aspects of the townships history and marks the approach to the Old Pass Office.

Tours by tour operators

Tours offered by various Cape Town's tour operators fall broadly under the following themes:

- **Exploring the city**: These are largely cultural tours, incorporating museums, monuments, the Company's Garden and the Bo-Kaap and District Six. Some tours also include the V&A Waterfront.
- **Winelands:** Includes the Constantia and Durbanville winelands and related historical points of interest.
- **Township tours:** Cultural tours for visitors to experience local township life.
- **Nature and wildlife:** This includes the Cape Floral Kingdom, Boulder's Beach, Kirstenbosch, Table Mountain, private game reserves and trips up the west coast for whale watching.
- **Cape Peninsula:** Tours along the peninsula usually include Cape Point, the Atlantic seaboard, Hout Bay and Chapman's Peak drive, and Simon's Town.

Further details of the destinations included in these tours is available in Appendix C.

3   Cultural Heritage Tourism

3.1   Introduction

Following on the analysis of the **supply** of cultural heritage tourism resources/assets in Section 2, the following two sections relate to the **demand side** of cultural heritage tourism, i.e. the size, profile and value of the **market**.

The first step towards a description of the demand for cultural heritage tourism in Cape Town is an understanding of the meaning of key terms and drawing of boundaries. This section presents an analysis of the terms 'heritage tourism' and 'cultural heritage tourism', concluding with a working definition for this study. The second part of Section 3 provides an overview of relevant polices and strategies. Section 4 follows with a review of the various studies of cultural/cultural heritage tourism markets, presenting both theoretical views of the make-up of the market and facts and figures about the size and profile of culture and heritage tourism markets.

3.2   Defining heritage and cultural tourism

A wide range of meanings exist for the term **cultural tourism**, as is reflected by a search of the academic literature and destination strategies and policies.   The United Nations World Tourism Organisation (UNWTO) (1985) defines cultural tourism from two different approaches.

- The **narrow definition** includes movement of persons essentially for cultural motivations such as study tours, travel to festivals and other cultural events, visits to sites and monuments, travel to study nature, folklore or art, and pilgrimages.
- The **wide definition** includes all movements of persons for the purpose of satisfying the human need for diversity, tending to raise the cultural level of the individual and giving rise to new knowledge, experience and encounters (Richards, 2008).

The Association for Tourism and Leisure Education (ATLAS) also defines cultural tourism from a technical and conceptual approach. The technical definition refers to *all movements of persons to specific cultural attractions such as heritage sites, artistic and cultural manifestations, arts and drama outside their normal place of residents* (Richards, 2008). The conceptual definition, on the other hand, refers to *the movement of persons to cultural attractions away from their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs*.

The definition of cultural tourism in the White Paper on Development and Promotion of Tourism (South Africa, 1996b:v) includes cultural aspects that are of interest to the visitor and can be marketed as such. These include customs and traditions of people, their heritage, history and way of life. The definition of cultural tourism is comprehensive, including culture, heritage and the physical environment. It is described as "*that activity, which enables people to experience the different ways of life of other people, thereby gaining at first hand an understanding of their customs, traditions, the physical*

environment, the intellectual ideas and those places of architectural, historic, archaeological or other cultural significance which remain from earlier times".

A selection of the multitude of definitions of cultural tourism that have been coined over time is shown in Table 2.

Table 2   [Definitions of cultural tourism]

Definitions: Cultural Tourism
Cultural tourism may be defined as that movement which involves people in the <u>exploration or the experience of the diverse ways of life of other people</u>, reflecting all the social customs, religious traditions, or intellectual ideas of their cultural heritage (IOCOMOS Charter for Cultural Tourism, Draft April 1997). Cultural tourism can be defined as that activity which enables people to experience the <u>different ways of life of other people</u>, thereby gaining at first hand an understanding of their customs, traditions, the physical environment, the intellectual ideas and those places of architectural, historic, archaeological or other cultural significance which remain from earlier times. Cultural tourism differs from recreational tourism in that it seeks to gain an <u>understanding or appreciation of the nature of the place</u> being visited (IOCOMOS Charter for Cultural Tourism, Draft April 1997). The movements of persons for essentially <u>cultural motivations</u>, which they suggest includes study tours, performing arts, cultural tours, travel to festivals, visits to historic sites and monuments, folklore and pilgrimages (WTO, 1985) Cultural Tourism encompasses <u>heritage including intangible heritage, contemporary and popular culture, and creativity</u>. Performing, visual and literary arts, museums, built and social heritage, historic landscapes and gardens, crafts, architecture, film, religion, broadcasting, food and sport can be included within the definition of cultural tourism. It links with and benefits from creative industries. (European Cultural Tourism Network) http://www.ectn.eu.com/cardiffdec.php A cultural tourist is defined as a person who stayed more than 40 kilometres away from home for at least one night and <u>attended a cultural venue</u>. (Note that cultural venues were defined to comprise the following venues and activities: art gallery; museum; animal/marine park; botanical garden; library; popular music concert; classical music concert; theatre; dance; opera or musical theatre; other performing arts; and cinema.) (Australian Bureau of Statistics, 'Domestic Cultural Tourism in Australia, 1994-95', 1997). Cultural tourism is defined by attendance by inbound visitors at one or more of the following <u>cultural attractions</u> during their visit to Australia: <u>festivals or fairs</u> (music, dance, comedy, visual arts, multi-arts and heritage); <u>performing arts or concerts</u> (theatre, opera, ballet and classical and contemporary music); <u>museums or art galleries; historic or heritage buildings, sites or monuments; art or craft workshops or studios; and Aboriginal sites and cultural displays</u> (Bureau of Tourism Research, 'Cultural Tourism in Australia', 1998, p.7). Cultural tourism is tourism that focuses on the <u>culture of a destination - the lifestyle, heritage, arts, industries and leisure pursuits of the local population</u> (Office of National Tourism 'Fact Sheet No 10 Cultural Tourism', 1997). Cultural tourism defines the phenomenon of people travelling specifically for the sake of either experiencing <u>another culture or the cultural attractions of a place</u> (Arts Industry Tourism Council, 'Cultural Tourism Development in Victoria', June 1997). Cultural tourism covers products which <u>authentically reflect the culture of the destination</u> (e.g. lifestyle, heritage and industrial activity) and visitors who seek an <u>understanding of that culture</u> (Tasmanian Department of Tourism, Sport and Recreation, 'Strategies for Growth', 1995). Visits by persons from outside the host community motivated wholly or in part by interest in the <u>historical, artistic, scientific or lifestyle/heritage offerings of a community, region, group or institution</u>.

(Lord, 2002)

As could be expected definitions of 'cultural tourism' refer exclusively to cultural resources or assets associated with a destination's people and their cultures. Cultural tourism is not delimited to experiences of historical assets - contemporary cultural resources and present day experiences of a people's lifestyles and their cultural expressions are clearly included in the definitions.

Definitions of 'heritage tourism' and 'cultural heritage tourism' are equally diverse. A selection of these definitions is provided below.

Table 3   **[Definitions of heritage tourism]**

Definitions of heritage/cultural heritage tourism
Heritage tourism can be defined as a visitation to a <u>historical area</u> consisting activities that provides a <u>historical experience</u> with <u>educational value</u> based around consumer motivation. http://ehotelier.com/hospitality-news/item.php?id=P17401
Heritage tourism focuses on the <u>story of people and places</u> told through interpretation of <u>cultural landscapes and preservation or restoration of historic structures</u>." (National Association of Tribal Historic Preservation Officers, www.nathpo.org/Toolkit/NATHPO.pdf)
Heritage tourism is travel directed toward experiencing the <u>heritage of a city, region, state or country</u>. This travel enables the tourist to <u>learn about</u>, and be surrounded by, local customs, traditions, history and culture." (Texas Historical Commission, www.thc.state.tx.us/faqs/faqht.html)
An activity in which people enjoy the discovery of a place's <u>unique identity derived from its history</u>. .. A form of tourism based upon the <u>enhancement and protection of cultural resources</u> as an element of tourism resources." (Utah State Historical Society, http://history.utah.gov/httoolkit/g1.html)
Heritage tourism is a leisure trip with the primary purpose of visiting <u>historic, cultural, natural, recreational and scenic attractions</u> to <u>learn more</u> about the <u>past</u> in an enjoyable way. (Pennsylvania)
USA: Cultural heritage tourism is based on the mosaic of <u>places, traditions, art forms, celebrations and experiences that portray this nation and its people</u>, reflecting the diversity and character of the destination place. Travellers who engage in cultural tourism activities visit the following: • art galleries, theater and museums • historic sites, communities or landmarks • cultural events, festivals and fairs • ethnic communities and neighbourhoods • architectural and archaeological treasures
Heritage tourism is generally understood as the type of tourism activity through which tourists may learn about, witness and experience the <u>cultural heritage of a destination</u> (Greenwood, 1982; Klieger, 1990; Weiler and Hall, 1992; Williams, 1998).
It caters to the tourist's experiential consumption of a destination's cultural heritages which manifest a variety of features including <u>archaeological and historic sites, buildings, locations and facilities that have a cultural significance to the community</u> (Hong Kong Antiquities and

Monuments Office, 1992; McIntosh, 1999).

Zeppel and Hall (1992)   .....a form of specialty travel, based on <u>nostalgia of the past</u> and the desire to experience <u>diverse cultural landscapes</u>.

Tourism Australia (2009)   ... tourists participating in at least one of the following activities: attend theatre, concerts or performing arts; visit museums or art galleries; visit art, craft workshops; attend festivals, fairs or cultural events; experience aboriginal art, craft and cultural displays; visit an aboriginal site or community; and visit heritage buildings, sites or monuments.

US Section 7 of Executive Order 13287: The business and practice of attracting and accommodating visitors to a place or area based especially on the <u>unique or special aspects of that locale's history, landscape (including trail systems), and culture</u>.

Fyall and Garrod (1998)   ..... economic activity that makes use of <u>socio-cultural assets</u> to attract tourists and visitors.

Cultural heritage tourism is travelling to experience the places and activities that authentically represent the stories and people of the past and present. It includes historic, cultural and natural attractions. (Wyoming)

It is clear from Table 3 that a single, commonly accepted definition of heritage tourism/cultural heritage tourism does not exist and that destinations' understanding of these concepts is diverse. Some definitions take the broad interpretation of heritage as including both cultural and natural heritage resources, whilst others limit heritage to cultural assets. There is somewhat greater consistency in the relationship of heritage tourism to time, with most definitions associating heritage tourism with experiencing resources created in the **past or historical resources**. Another important dimension of these definitions is the frequent reference to **learning and understanding**.

In summary, definitions of 'cultural tourism' and 'heritage tourism' overlap in their reference to the use of cultural resources to attract tourists, but are dissimilar in relation to the inclusion of natural heritage resources.   Furthermore, 'cultural tourism' refers to both contemporary and historical cultural assets, whereas the focus of 'heritage tourism' is on historical assets.

The following definition is put forward as a working definition for this study:

Cultural heritage tourism is defined as visitation by **inbound visitors** to one or more of the following **cultural heritage resources** that provides an **historical experience** during their visit to Cape Town:

- **Heritage sites, places and cultural landscapes including**: declared World Heritage Sites, Grade1 (national) and Grade 2 (provincial) sites and Grade 3 (local) heritage sites and heritage areas, as defined in the NHRA, and included in the SAHRA data-base and local registers. This definition may include monuments, memorials, buildings and assemblages of building, streetscapes, heritage precincts, cultural landscapes, archaeological sites, routes, and other sites of cultural significance, at a variety of scales.

- **Places of interpretation and presentation including**: national, provincial, province aided, local museums and private, institutional and community museums,

interpretation centres, visitor attractions and sites with interpretive signage.

- **Contemporary events and activities** that draw on or reflect elements of Cape Town's cultural and regional heritage including: festivals and performances

3.3   Relevant policies and strategies

The most pertinent international, national and local tourism policies and strategies are discussed below.

3.3.1   *Cape Town Declaration, 2002*

The *Cape Town Declaration* was the key output of the 1st International Conference on Responsible Tourism in Destinations held in August 2002. The Cape Town Declaration:

- acknowledges that the diversity of the world's cultures, habitats and species and the wealth of our cultural and natural heritage is the very basis of tourism,

- recognises that in order to protect the cultural, social and environmental integrity of destinations limits to tourism development are sometimes necessary, and

- advocates for tourism that:
  - makes positive contributions to the conservation of natural and cultural heritage, to the maintenance of the world's diversity;
  - provides more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues;
  - provides access for physically challenged people; and
  - is culturally sensitive, engenders respect between tourists and hosts, and builds local pride and confidence.

3.3.2   White Paper on the development and promotion of tourism in South Africa, 1996

Whilst the 1996 White Paper makes reference to the untapped potential of the country's cultural resources for tourism, it cautions that cultural resources should be effectively managed and conserved. The following guidelines are specified:

- ensure tourism takes note of cultural heritage resources within specific communities and environments.
- cultural resources should be managed to the negotiated benefit of all interested parties within the communities.
- access to management of cultural resources should be as broad as possible within specific communities and should promote co-operation between all affected parties.
- landuse planning and development projects for tourism should include effective protection and sustainable utilisation of cultural resources.

3.3.3   National Responsible Tourism Guidelines, 2002

The Responsible Tourism Guidelines were designed during 2001 to provide national guidance and indicators to enable the tourism sector to demonstrate progress towards the principles of responsible tourism embodied in the 1996 *White Paper on the Development and Promotion of Tourism in South* Africa.

The Responsible Tourism Guidelines outlines a set of guiding principles for economic, social and environment responsibility. The Responsible Tourism Guidelines recognises that tourism can create revenue from cultural heritage and traditional ways of life, and recommends the following in relation to tourism and cultural heritage:

- identification of cultural heritage resources in the local area and where there is sufficient demand from tourists and work with the local community to develop them as sustainable tourism attractions.
- ensure that the visual way in which the product is presented includes local cultural elements and emphasises the richness of the local complementary product.
- empower communities to market their cultural traditions and products as assets and enhance their economic opportunities.
- interpretation material and visitor information centres should be developed in consultation with local communities.

- showcasing of local cultural artefacts in tourism businesses and encouragement of the development and sale of traditional cultural products, crafts and folklore.

- encourage craft and other cultural workers to maintain the authenticity and cultural values of their products. Encourage craft workers to explain the cultural values and history of their crafts.

- serving local dishes and source soft furnishings, arts and crafts locally.

The guidelines also heed against the negative social and cultural impacts associated with tourism, and advocates for tourism and tourists that respect and nurture local cultures (including religion), so that they enrich the tourism experience and build pride and confidence among local communities.

3.3.4 Draft National Tourism Sector Strategy, 2009

The Draft National Tourism Sector Strategy (NTSS), released in May 2009, set "Respect for our culture and heritage" – to ensure that all tourism development and activity respects all aspects of South Africa's diverse heritage and culture, as a key value of the future of tourism in the country. It also identifies Responsible Tourism (tourism development and activity delivers on the triple bottom-line, economic, social and environmental sustainability) as an underpinning value.

Culture, heritage and tourism are addressed in various problem statements. Notably, the poor quality, poor management and lack of maintenance of cultural and heritage attractions, are seen to devalue the visitor experience and inflict damage the image of the destination. The draft NTTS also asserts that some tourism investors and operators have taken advantage of the natural and cultural resources belonging to communities without any benefits accruing to the communities.

Actions related to cultural and heritage tourism resources are found under the strategic thrust "Coordinate product Development". The primary proposed action is the development and implementation of a strategy to upgrade tourism attractions and heritage resources - including museums, monuments, etc. - across the country with the assistance from the Dept of Arts & Culture and working through local government or other government entities, where applicable. Although it is understood that the National Department of Tourism is in process of developing such a strategy, the outputs are not yet available.

3.3.5 Tourism Development Framework for Cape Town, 2005

Recognising that Cape Town's attraction as a visitor destination is largely based on its unique cultural and heritage resources, and that the diversity of cultures, lifestyles, heritage and environments sets it apart from many other cities, the Tourism Development Framework (TDF) identified culture and heritage as one of the five key niche markets for Cape Town.

The TDF identifies three outputs in relation to cultural and heritage tourism:

- adoption of a Cultural and Heritage Tourism Development and Marketing Plan and Programme aimed at strengthening the unique elements of Cape Town's culture, heritage and lifestyles in brand positioning and product development

- implementation of 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 Tourism Development Areas

- implementation of a programme of actions aimed at celebrating the city's contemporary arts and heritage is implemented.

Details regarding the actions related to these outputs are presented in Appendix A. The TDF also identifies various actions to strengthen the 'sense of place' of the defined tourism development areas. These are also shown in Appendix A.

3.3.6 *City of Cape Town Responsible Tourism Policy, 2009*

Cape Town's Responsible Tourism Policy provides a framework for the management of tourism within the municipal area to ensure that tourism in the destination -

- makes positive contributions to the conservation of natural and cultural heritage embracing diversity

- minimises negative economic, environmental and social impacts

- provides more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues

- is culturally sensitive, encourages respect between tourists and hosts, and builds local pride and confidence

- generates greater economic benefits for local people and enhances the well being of host communities

- provides accurate information about accessibility of facilities and infrastructure for people with disabilities (visual, communication, mobility) to customers,

- involves local people in decisions that affect their lives and life chances, and

- improves working conditions and access to the industry.

The policy aims to ensure that tourism contributes to sustainable development through establishing the basis for:

- **economically sustainable tourism** that contributes to poverty alleviation, economic empowerment, job creation, business development and skills development

- **social and culturally sustainable tourism** that enhances and protects the value of local lifestyles and heritage for tourism

- **environmentally sustainable tourism**, including minimization of resource consumption and the conservation of natural resources

The Responsible Tourism Policy includes the following policy principles related to culture and heritage:

- establishing guidelines or a code of behavior for visitors and tourism operators in order to minimize visitor impact and maximize enjoyment

- promoting tourism that maintains and encourages social and cultural diversity

- ensuring that the tourism sector uses cultural heritage resources in a way that maximises the benefit to all, while ensuring that those resources are protected for the use of future generations
- developing and marketing tourism in ways that reflect and celebrate the cultural and social diversity of the destination

4   The market for cultural heritage tourism

4.1   Introduction

Developing an accurate profile and measuring or sizing the market for 'cultural heritage tourism' is extremely difficult. The meaning attributed to 'heritage tourism' or 'cultural tourism' in one report may be fundamentally different from the meaning in another report, e.g. heritage tourism may be described as visits to cultural and natural heritage resources, or interpreted as visits to cultural resources only. Similarly, cultural tourism may be viewed to include visitation to historical attractions only, or be seen to also include contemporary cultural resources. Given the diversity in the interpretation of the scope of definitions, the findings of market studies are often not directly comparable.   Furthermore, very few studies report on 'cultural heritage tourism' as defined in this study.

The following section presents an overview of various studies of 'heritage tourists', 'cultural tourists' or cultural heritage tourist'. It will be shown that despite definitional anomalies it is possible to derive a generic profile of the 'cultural heritage market'.   Deriving an accurate estimate of the size of the global market is, however, more complex. The presentation of figures and statistics in this section attempts to provide a sense of the relative scale of this market.

4.2   Deconstructing and sizing the "cultural heritage tourism market"

Cultural heritage tourism is based on the mosaic of places, traditions, celebrations and experiences that portrays the history of a destination and its people, reflecting diversity and character. Academics and tourism marketers define cultural heritage tourism as a discrete product category that is differentiated from other tourism activities or attractions by consumption of a destination's tangible and intangible cultural heritage (Richards, 1996; Shackley, 1998; Hall and MacArthur, 1998). The UNWTO has identified 'cultural tourism' as one of the fastest growing tourism segments. In 2001, 35 to 40% of all trips taken by tourists were for cultural tourism and that the sector was then growing at 15% per annum (UNWTO). Woodward (2009) reports that thirty percent of all European tourist destinations were selected because of their cultural tourism product offerings.

The above estimates of market size apply narrow definitions, i.e. refer to those **tourists who select tourist destinations because of their cultural tourism product offerings**. However, a growing body of literature indicates that the market for cultural heritage tourism experiences is not limited to those people highly motivated to participate in cultural tourism. The cultural/heritage tourism market can be dissected into various layers, segments or types based on how important cultural heritage features of destinations are as attractors, and the tourist's level of 'consumption' of cultural heritage tourism products (McKercher, 2002).

Five of the various typologies of cultural tourists are discussed below:

- Silberberg (1995) identified four types of cultural tourists, ranging from the greatly motivated to the accidental.

- Shifflet and Associates (1999) identified three types of heritage tourists: 'core', 'moderate' and 'low', with each of the segments demonstrating different behaviour and spending patterns.

- McKercher and Du Gros (2003) differentiate five types of cultural tourists not only by the importance of culture in their decision to travel, but also the depth of experience (Figure 3).

- Ivanovic (2008) describes cultural tourists in the following groups: The **purposeful cultural tourist** who views cultural tourism as the primary motivation for travel to a destination and who seeks a deep cultural experience; the **site seeing cultural tourist** for whom a cultural experience is mostly superficial; the **opportune (serendipitous) cultural tourist** whose travel to a destination is not culturally motivated, but who, after participating in cultural activities, ends up having a deep cultural experience; and the **casual cultural tourist** who has a weak cultural motivation for travel and therefore has a superficial cultural experience.

McKercher *et al.* (2002: 37), in segmenting the cultural-tourism market in Hong Kong, found "**Cultural Generalists**" (predominantly Westerners who participate in a number of activities without a clear thematic or geographic pattern and who see the destination's culture as being very different from their own and as very attractive) to comprise the largest segment at 25 per cent. They typically travel independently and for pleasure, while about 15 per cent of them qualify as "visiting friends and relatives" (VFR). Culture and heritage to them is a moderateto-high motivator for travelling to Hong Kong. Depending on the depth of cultural experience sought, "Cultural generalists" are either purposeful or sightseeing and prefer to visit obscure sites rather than well-known places (2002: 38). The second-largest segment were "**Icon Culturalists**" (24 per cent) who prefer "cultural attractions that have transcended their cultural roots to become mainstream tourism attractions. [...] This segment would rather shop than goto museums and when they participate in cultural tourism activities, shows a preference for joining local tours." (2002: 38). A third segment of 22 per cent displays a preference for the better-known heritage attractions and religious sites and consists mainly of visitors from the continent (2002: 38). The remainder are largely overseas tourists with a special interest, e.g. colonial tourism.

Figure 3   [Typology of cultural tourists]

Deep		
	Serendipitous cultural tourist A tourist who does not travel for cultural reasons, but who, after participating, ends up having a deep cultural tourism experience	**Purposeful cultural tourist** Cultural tourism is the primary motive for visiting a destination and the tourist has a very deep cultural experience
Experience sought	**Incidental cultural tourist** This tourist does not travel for cultural reasons, but nonetheless participates in some activities and has shallow experiences	**Casual cultural tourist** Cultural tourism is a weak motive for travel and the resulting experience is shallow	**Sightseeing cultural tourist** Cultural tourism is a primary reason for visiting a destination, but the experience is less deep
Shallow		

Low   **High**

Importance of cultural tourism in the decision to visit a destination

Source: McKercer and Gross, 2003)

Porla et. Al. 2003: 248 identifies four types of tourists that visit cultural and heritage sites.

Figure 4 **[Types of tourists visiting a cultural or heritage site (Porla et. Al. 2003: 248)]**
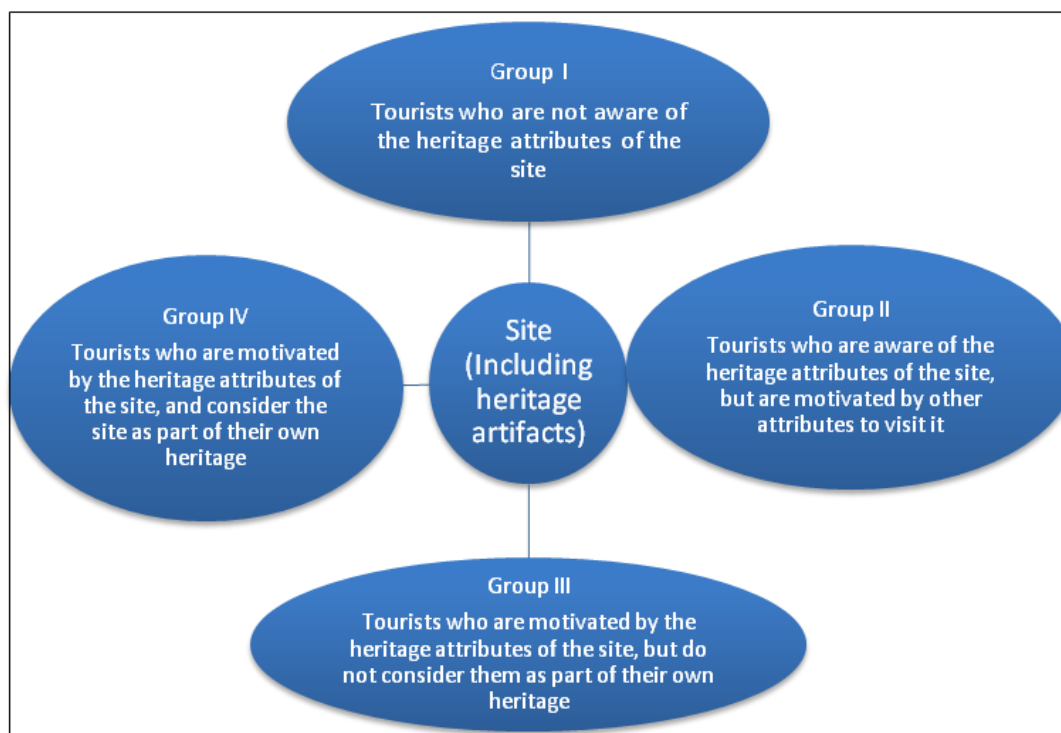
Figure 4 illustrates that although there are different types of cultural tourists have different travel motivations; they all at some point interact with the heritage resources and sites at their destination.

LORD Cultural Resources Planning and Management Inc. not only defines the different categories of cultural tourists, but also estimates the relative size of each category. According to Lord (2002), cultural tourism as an all consuming motivation is applicable to but **15 per cent of the total non-resident leisure travel** in the global marketplace. This is the group that would be traditionally considered as "**pure cultural tourists**", persons "**greatly motivated by culture**" and who travel to a city or region specifically because of its cultural opportunities such as museums, cultural festivals and theatre, representing perhaps. For the remaining more than 80 per cent of travellers it is a partial motivator. Some **30 per cent** of the market is **motivated "in part" by culture**. These are tourists who travel both because of the cultural opportunities and to visit friends and relatives or to relax by a lake. The third group representing about **20 per cent of the market** is for people for whom **culture is an "adjunct"** to another more important motivation. The fourth group, also about **20 per cent of the market** is what is referred to as the "**accidental cultural tourist**" – people travelling to the region who do not intend to go to a cultural attraction or event, but find, for example, that the friends or relatives they have visited bring them along, or that the cultural opportunity is close to their hotel, or that they "stumble" into an arts festival. **Outside the cultural tourism market spectrum**, about 15 per cent of international tourists are persons who wouldn't attend a cultural attraction or event under any circumstances.

Cape Town is well positioned to successfully target the cross-section of "cultural heritage tourists" by enhancing and building upon its existing product portfolio whilst planning for

the future. The goal should be to reach not just the 15 per cent "greatly motivated" cultural tourists but to reach the whole range – the 70 per cent of travellers who have the potential to participate in cultural/heritage activities along with other things.

4.3 Cultural heritage tourism markets

4.3.1 Introduction

The growth of cultural and heritage tourism as an economic force is undeniable. Tourists looking for unique and authentic experiences are increasingly interested in cultural sites and innovative arts programming, and travel to find these attractions (Creative City Network of Canada, 2009).

Globally, cultural and heritage tourism has been on the rise with destinations such as Australia reporting growth rates of between 3-5% in international cultural and heritage tourism (Tourism Research Australia, 2007). Cultural and heritage tourism is expected to grow as more and more people become environmentally conscious and appreciative of destinations' unique heritages. The top cultural and heritage activities globally include visiting museums, art galleries, heritage buildings and historical sites and monuments.

The following sections provide an overview of cultural heritage tourism markets in Canada, the United States and Australia. Following this, there is a discussion on cultural heritage tourism in South Africa and in the Western Cape. The analysis hones in on the characteristics of participants in cultural heritage tourism, with the aim to distil a profile/s of this market segment.

4.3.2 Canada: Domestic cultural and heritage market segments

4.3.2.1 <u>Introduction</u>

Canada has undertaken extensive research into the activities and motivations of both the Canadian domestic market and its major foreign source market, the United States. Activity groupings generated from variables within the Travel Activities and Motivation Survey (TAMS) include visiting Historical sites, Museums and Art Galleries (HMA), High Arts Performances, Fairs & Festivals, Wildlife Viewing, Ocean Activities and Extreme Air Sports. The various activity types are grouped into two main categories, i.e. **Outdoor Activities** and **Culture & Entertainment Activities** (see Appendix B for definitions).

The following sections provide more in depth descriptions of three of the **domestic Culture & Entertainment Activities segments**, i.e. Historical sites, Museums and Art Galleries (HMA) enthusiasts, High Arts Performances, Fairs & Festivals goers. These segments are also compared with a number of outdoor activities segments in a concluding section.

4.3.2.2 <u>Canada's Historical sites, Museums and Art Galleries enthusiasts</u>

Of the 24.7 million Canadian adults in 2006, about 10.7 million (43.4%) visited a historical site, museum or art gallery on a trip during 2004 and 2005. Other than shopping and dining, visiting historical sites, museums and art galleries was the most common activity undertaken by Canadian Pleasure Travelers while on trips in the past two years. Of those who visited historical sites, museums and galleries, 29.2% reported that this activity was the main reason for taking at least one trip.

This travel segment is similar to the average Canadian Pleasure Traveler in terms of gender, age and marital status. The majority are married (67.9%), older than 35 (67.4%) and live in adults only households (73%). However, they are slightly **more likely to have a university degree** (37.3%) and their **household incomes ($76,691) are slightly above-average**.

They seek vacations that are **intellectually stimulating** and provide **novelty and opportunities to learn**. Strolling around a city to observe buildings and architecture, was the most popular activity (30.6%), followed by visits to well-known sites & buildings (22.5%), other sites & monuments (18.5%), viewing natural wonders (18.1%) and visiting general history museums (17.4%), art galleries (14.5%), historical replicas (7.9%), military museums (7.1%) and paleontological or archaeological sites (5.4%). Notably, **visitation to museums** is ranked fairly low. By implication, destinations ought to pay more attention to creating an appealing cultural heritage experience within the general townscape, effectively using the spaces and places that tourists move through on their wanderings for interpretation, performance and display areas and commemoration.

The following table illustrates the most popular other activities engaged in by Canadian HMA enthusiasts.

Table 4 **[Canadian HMA segment: Cultural and entertainment activities]**

Activity	% of segment participating	Index [3]
Theme parks and exhibits	47.9%	122
Fairs & festivals	47.8%	127
Musical concerts, fairs and attractions	41.7%	127
Science & Technology exhibits	33.1%	143
Wine, beer & food tastings	32.7%	137
Live theatre	27.9%	132
Garden themed attraction	26.1%	148
Agro-tourism	20.1%	128
Aboriginal cultural experiences	17.0%	147
High Art Performance	15.8%	144
Spas	13.5%	134
Literary & film festivals	3.9%	152

While traveling, they were more likely than others to have attended live art performances (e.g., live theatre, live arts), to have visited a wide array of educational and outdoor attractions (e.g., science & technology exhibits/garden themed attractions).

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[3] The index indicates the segment's level of participation in the activity relative to the average Canadian pleasure traveller. Figures above 100 indicate a higher level of participation, and figure under 100 a lower level of participation.

They were also quite **active in outdoor activities and especially those that are nature-oriented**. They were moderately active in outdoor pursuits while on trips (albeit to a lesser extent than many of the other culture and entertainment activity types). The majority went **sunbathing and swimming in oceans and wildlife viewing** while on trips. They were especially likely to participate in nature-oriented outdoor activities (e.g., wildlife viewing, hiking, climbing and paddling, horseback riding). They were also more likely to exercise and jog, cycle, go freshwater scuba and snorkeling and go sailing and surfing while on trips. However, they were less likely than others to go hunting.

They were most likely to have stayed in **public or private campgrounds, seaside resorts and lakeside or riverside resorts** while on trips. Of these accommodation types, they were especially likely to have stayed at a **seaside resort**.

This activity segment is an **average user of the Internet to plan and book travel**. However, they are **above-average consumers of travel media** and can also be effectively targeted through science and nature media, history and biography television programs and magazines and news and current events media.

4.3.2.3   Canada's high performing arts enthusiasts

About 2.0 million or (8.2%) of adult Canadians attended a high art performance while on an out-of-town, overnight trip of one or more nights during 2004 and 2005. Overall, 4.5% of adult Canadians attended a ballet or other dance performance, 4.5% attended a classical or symphony music concert and 1.8% attended the opera. Of those who attended a high art performance, 32.0% (648,399) reported that this activity was the main reason for taking at least one trip.

Performing arts enthusiasts are more likely to be female (60.4%) and either **younger** (16.3% vs 12.8% - 18 to 24) or **older** (34.2% vs 27% - 55 plus) than the average Canadian Pleasure Traveler.

Most Performing Arts Tourism Enthusiasts live in **adult-only households** and fewer than one-quarter are have children under the age of 18 (22.1%). They are the **second best-educated** activity segment (45.9% university degree) and their **household incomes are above-average** ($77,969).

High Art Performance Attendees are **more frequent out-of-country travelers** than the majority of the other activity types. They were the 2nd most likely of the 21 culture and entertainment types to have traveled overseas (46.1%).

They prefer vacations that offer **intellectual stimulation, novelty and opportunities to learn**. They are much more likely to participate in multiple performance-based activities while on trips. The most popular performances include theatrical performances and festivals, concerts and dance.

Canadian High Art Performance Attendees have relatively **wide-ranging tourism interests**, with a particular **emphasis on other cultural activities**. Other cultural activities engaged in by this segment include the following:

Table 5   **[Canadian Performing Arts Enthusiast segment: Cultural and entertainment activities]**

Activity	% of segment participating	Index
Historical Sites, Museums & Art Galleries	83.8%	144
Theme parks and exhibits	54.1%	138
Fairs & festivals	58.9%	156
Musical concerts, fairs and attractions	64.6%	197
Science & Technology exhibits	42.5%	184
Wine, beer & food tastings	41.9%	176
Live theatre	54.6%	259
Garden themed attraction	37.4%	213
Agro-tourism	25.8%	165
Aboriginal cultural experiences	22.9%	197
High Art Performance	15.8%	144
Spas	21.3%	212
Literary & film festivals	10.1%	391

They are also quite **active in outdoor activities** (e.g., cross-country skiing & snowshoeing, sailing & surfing). They most often stay in **resorts or accommodation that specializes in fine cuisine**.

This segment is a **heavy user of the Internet** to plan (71.2%) and book (51.1%) travel. They **avidly consume travel-related media** and may also be effectively targeted through classical music, jazz and multicultural radio stations, business, finance and investing magazines, science and geography magazines and news and current events media.

4.3.2.4   Canada's Fair & festivals goers

About 7 million Canadian adults (28%) have shown to be Fairs & Festival Goers. Farmers' markets or country fairs (15.0%) were visited most often, followed by fireworks displays (11.8%), exhibitions or fairs (8.6%), carnivals (5.1%), food and drink festivals (4.1%) and ethnic festivals (3.2%). Attending fairs and festivals while on trips was the 4th most frequent culture and entertainment activity type undertaken by Canadian Pleasure Travelers in the past two years. Of those who visited a fair or festival, 28.3% (1,964,877) reported that this activity was the main reason for taking at least one trip in the past two years.

Relative to the average Canadian Pleasure Traveler, Fair and Festival Visitors are slightly more likely to be female (53.1%) and younger (55.7% vs 52.6% under 45). The majority are married, live in adult-only households and their level of education and household incomes ($74,722) are slightly above-average.

The **out-of-country travel activity** of those who attended fairs and festivals is **below-average**.

They prefer vacations that offer **novelty and learning opportunities** as well as a chance to **renew personal connections with their friends**. Fair and Festival Visitors were very likely to attend other types of exhibitions and festivals while on trips (e.g., HMA, theme parks & exhibits; musical concerts, festivals & attractions; science & technology exhibits; equestrian & western events; comedy festivals & clubs; literary & film festivals). The following table illustrates the most popular activities engaged in by Canadian Fairs & Festivals goers.

Table 6 **[Canadian Fairs & Festivals segment: Cultural and entertainment activities]**

Activity	% of segment participating	Index
Historical Sites, Museums & Art Galleries	74.0%	127
Theme parks and exhibits	55.8%	143
Musical concerts, fairs and attractions	50.6%	154
Science & Technology exhibits	34.8%	151
Wine, beer & food tastings	35.5%	148
Live theatre	30.9%	147
Garden themed attraction	28.6%	162
Agro-tourism	26.7%	170
Aboriginal cultural experiences	20.8%	179
High Art Performance	17.2%	156
Spas	15.2%	152
Literary & film festivals	5.0%	194

They were also **very active in outdoor activities** while on trips and **especially physically strenuous activities** (e.g., exercising & jogging, cycling). Relative to the average Canadian Pleasure Traveler, this activity segment was also more likely to have stayed in **wilderness settings** (e.g., remote or fly-in wilderness outposts) and several of the more **unusual accommodation** types (e.g., health spas, farm or guest ranch, houseboats, and cooking schools).

Fairs and festivals Goers are **below-average users of the Internet** to plan (66.5%) and book (43.1%) travel. However, they are **above-average consumers of travel-related media** and may also be effectively targeted through house and home-related media (e.g., house & home websites; home & garden television; crafts, antiques & collectibles magazines).

4.3.2.5 <u>Comparative analysis of Canadian activity segments</u>

The Canadian market research indicates that the various culture and entertainment activity segments engage in a range of cultural activities other than their primary motivator. However, some segments are more avid consumers of cultural activities than others. The table below provides information on the activity profile of the market segments described previously, as well as the 'participatory historical experiences' segment, the most active of the culture and entertainment activity types.

Table 7 **[Comparison of Canadian Culture and Entertainment activity segments]**

Activity profile [4]

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[4] Cooler shades indicates lower level of participation; warmer shades indicate higher levels of participation

	Fairs & festivals		High Art Performances		Historical sites, Museums & Art Galleries		Participatory historical experiences	
Historical Sites, Museums & Art Galleries	74.0%	127	83.8%	144	100%	172	90.2%	155
Theme parks and exhibits	55.8%	143	54.1%	138	47.9%	122	54.1%	138
Fairs & festivals	100%	265	58.9%	156	47.8%	127	62.4%	166
Musical concerts, fairs and attractions	50.6%	154	64.6%	197	41.7%	127	54.4%	166
Science & Technology exhibits	34.8%	151	42.5%	184	33.1%	143	45.5%	197
Wine, beer & food tastings	35.5%	148	41.9%	176	32.7%	137	48.7%	205
Live theatre	30.9%	147	54.6%	259	27.9%	132	37.5%	178
Garden themed attraction	28.6%	162	37.4%	213	26.1%	148	39.6%	225
Agro-tourism	26.7%	170	25.8%	165	20.1%	128	33.3%	212
Aboriginal cultural experiences	20.8%	179	22.9%	197	17.0%	147	33.3%	287
High Art Performance	17.2%	156	15.8%	144	15.8%	144	21.1%	192
Spas	15.2%	152	21.3%	212	13.5%	134	19.4%	194
Literary & film festivals	5.0%	194	10.1%	391	3.9%	152	6.2%	240

Notably, all segments are avid consumers of HMAs. Theme parks and exhibits, Fairs and festivals, musical concerts, fairs and attractions, and science and technology exhibits are popular activities for all segments. Fans of High Art Performances and Participatory Historical Experiences are overall more active than the other segments in relation to culture and entertainment activities. They are keen participants in wine, food and beer tastings, garden themed attractions and live theatre.

These findings indicate that the potential market for cultural heritage tourism extends beyond the HMA focussed segment. Destinations that offer a range of activities that 'offer opportunities to learn', and creatively combine the preferred activities into comprehensive experiences, will appeal not only to the HMA focussed segment but also other segments that visit HMA during their travels. These segments are likely to respond to destination messages that emphasise destination features and characteristics that correspond to their interests.

Furthermore, 'Cultural tourists' are likely to participate in outdoor activities during their travels, and likewise, 'outdoor activity segments' are likely to participate in 'cultural activities'. The following table illustrates the overlaps in Canadian market segments.

Table 8   [Overlap in Canadian market segments]

	Outdoor activities				Culture			
	Golf	Hiking, paddling & climbing	Ocean activities	Wildlife viewing	Historical sites, Museums & Galleries	High Arts Performances	Fairs & festivals	Participatory historical experiences
Percent of segment	%	%	%	%	%	%	%	%
Outdoor activity segments								
Golf		38.9	**61.2**	43.1	**63.0**	13.8	45.6	6.6
Hiking, paddling and climbing	20.9		**68.7**	68.6	**76.3**	16.4	51.2	12.9
Ocean activities	23.1	48.2		**54.5**	**68.6**	14.6	47.5	9.2
Wildlife viewing	19.1	56.7	**64.1**		**77.4**	15.7	52.9	12.7
Cultural / heritage segments								
Historical sites, Museums & Galleries	19.8	44.6	**57.1**	54.8		15.8	47.8	10.3
High arts performances	23.0	50.8	**64.6**	58.9	**83.8**		58.9	12.9
Fairs and Festivals	22.1	46.3	**61.2**	57.9	**75.0**	17.2		11.1
Participatory historical experiences	18.2	65.8	66.7	**78.2**	**90.0**	21.2	62.4	

Visiting HMA is the second most popular activity for all outdoor activity segments and the cultural heritage activity segments. Amongst three of the four cultural activity segments, activities related to the ocean rank third.

Whereas travellers who engage in participatory historical experiences tend to be the most active segment overall, with relatively high levels of participation across all types of activities, Golf enthusiasts are the least active of all segments analysed. The visiting HMA segments is the least active of the four cultural activity segments, and has the second lowest levels of participation in activities overall. Although this segment is the largest by far, destinations seeking to attract high levels of engagement with experiences on offer, would do well to appeal to the activity interests of other segments – both in product development and marketing messages.

The table below provides information on the total size and demographic characteristics of each of these market segments.

Table 9   [Demographic characteristics of Canadian market segments]

Demographic characteristics

	Fairs & festivals	High Art Performances	Historical sites, Museums & Art Galleries	Participatory historical experiences
Segment size	6 949 250	2 023 840	10 751 004	1 232 788
Percentage of Canadian adults	28%	8.2%	43.4%	5.0%
Average age	43.3	46.0	44.3	45
Average household income	$74,722	$77,969	$76,691	$80,197
University level qualification	32.4%	45.9%	37.3%	42.3%

Canadian cultural heritage tourists are usually over the age of 35 and live in adult only households, where there are no family members under the age of 18. Only one third of these tourists take into account the needs of teenagers and children when planning a trip. These heritage tourists also tend to be more affluent than the typical Canadian domestic tourist, with an average household income of $77 395 compared to $71 500 for the typical leisure tourist. Higher household incomes have shown to be consistent with higher levels of formal education and more than a third of domestic heritage tourists have at least one university degree.

In the planning for cultural heritage tourism in Canada and also in terms of product development, the following three fundamental changes in Canada's population structure are relevant:

- Provinces and regions grow at different rates and the portion of cultural heritage tourists will differ in different areas
- As the population changes, older people are representing a larger portion
- Increasing numbers of Canadians are being born outside of Canada and have a good chance of returning as cultural heritage tourists (Canadian Tourism Commission, 2008:6)

4.3.3   United States: Cultural and heritage tourism market segments

The United States is South Africa's **second most important overseas market**, and a key market for the Western Cape and Cape Town.

The following sections provide more in depth descriptions of three activity segments, i.e. the Historical Sites, Museums and Art Galleries segment; Performing Arts segment and Fairs & Festivals segment

4.3.3.2   <u>US Historical sites, Museums and Art Galleries segment</u>

At 91 million, adult American that visited Historical sites, Museums and Art Galleries (VHMA) represent 41.4% of the 176 million Americans who took trips over a two-year period (or 53.5% of the 170 million Americans who took leisure trips). Other than shopping and dining, visiting historical sites, museums and art galleries was the **most common activity undertaken by US Pleasure Travelers** while on trips in 2004 and 2005.

Visiting HMA is a fairly strong motivator, with 32.8% (29,941,969) reporting that this activity was the main reason for taking at least one trip in the past two years. They are more likely than the average US pleasure traveller to seek vacation experiences that **offer opportunities to learn** (e.g., see or do something new and different, enrich perspective on life, gain knowledge of history and other cultures or places, stimulate your mind).

Within the general category of visiting HMA, '**strolling around a city to observe buildings and architecture**' (25.6%) was the most popular activity, followed by 'visits to historical sites or buildings' (23.1% well-known sites and buildings, 19.2% less well-known sites and buildings), 'visits to well-known natural wonders' (16.3%), '**visits to museums' (15.0% general history, 7.9% military**), 'visits to art galleries' (11.1%), and 'visits to historical replicas of cities or towns' (7.2%).   The preference for a more general experience of the townscape over visits to museums corresponds with the preferences of the Canadian HMA segment.

They are **somewhat older** than the average U.S. Pleasure Traveler (46.4 vs 45.4), most live in adult-only households and almost two thirds are likely to be in the market for performance based tourism experiences that take into account the interests and needs of teenagers or children. They are more likely than the typical US traveller to have **university level qualifications** (65.3%). Their **household income ($80,734) is above-average**. They tend to live in mid-sized and larger cities.

This segment considers it more important that a destination offers mid-range priced accommodation and direct access by air. Conversely, this segment considers it less important that a destination offers lots of things for children to see and do, budget accommodations, low cost package deals and convenient access by car. They are less likely to consider it important that a destination has a familiar culture and language. In fact, **a distinctive culture is likely to be quite appealing to this segment**.

This segment is more likely than the average U.S. Pleasure Traveler to engage in culture and entertainment activities while on trips, and especially activities which offer an opportunity to learn (e.g., participatory historical activities, science & technology exhibit,

aboriginal culture experiences). Activities engaged in by this segment include the following:

Table 10   [US Visiting HMA segment: Cultural and entertainment activities]

Activity	% of segment participating	Index
Theme parks and exhibits	57.9%	118
Fairs & festivals	54.4%	133
Fine dining & spas	43.3%	131
Science & Technology exhibits	37.6%	152
Wine, beer & food tastings	33.1%	145
Garden themed attraction	22.0%	161
Agro-tourism	19.4%	144
High Art Performance	16.7%	153
Aboriginal cultural experiences	14.0%	162
Theatre, film & music festivals	12.0%	145

Theme parks & exhibits (theme parks, zoos and aquariums) and science/technology exhibits are popular with this segment. Most of the travellers in this market segment also attend fairs and festivals while travelling.

They are more likely than the average to have participated in a **wide range of outdoor activities** while on trips and **especially wildlife viewing**. Also more likely to go hiking, climbing and paddling, exercising and jogging, cycling, cross-country skiing and to participate in extreme sports (e.g. extreme air sports, extreme skiing).

With Cape Town's rich culture and heritage and the number of museums in the City, including the famous District Six museum, there is great potential to attract these tourists. By penetrating this market, there will also be benefits for other components of the cultural heritage tourism sector as they are likely to participate in other activities as shown above. Museums, other cultural institutions, tourism packagers, and destination marketing organizations (DMOs) should respond by developing marketing and packaging strategies that consider the overlap between US tourists who go to museums and those who go to related cultural institutions such as botanical gardens and zoos.

Most travelers in this segment **use the Internet** to plan their trips (77.5%), and 57.1% booked at least part of a trip online in the past two years. They are more likely than the average U.S. Pleasure Traveler to obtain **travel information from official travel guides and brochures** and they are **avid consumers of travel-related media** (especially magazines) and news and current events media (e.g., talk & news radio, newspaper websites, network news websites). These are prime media channels by which to reach this segment.

4.3.3.3   US high art performances segment

Some 8.5% (18,666,340) of adult Americans attended high art performances while on trips during 2005-2006. This represents some 10.9% of the 170 million Americans who took leisure trips.

This segment is the **second oldest** of the US cultural activity types, are the **second best educated and have the fourth highest household incomes**. This segment is slightly more likely to be female and is generally older than the average U.S. Pleasure Traveler. Most live in adult-only households and only a fifth is likely to be in the market for performance based tourism experiences that take into account the interests and needs of teenagers or children.

Performing Arts Tourism Enthusiasts have **income levels well above average**, with an average household income of $89,351 compared to $74,303for the typical US leisure traveller. They are significantly more likely than the typical US traveller to have a **university level qualification degree** (74%).

Performing Arts Tourism Enthusiasts participate in multiple performance-based activities while on trips. Ballet and other dance performances (4.0%) and classical music concerts (3.9%) were the most popular high art performances attended, followed by jazz concerts (2.9%) and the opera (1.4%).

They view the entire holiday as an experience, and **seek participatory and authentic experiences through which to gain new knowledge**. This segment is especially likely to consider it important that a destination offer novelty (e.g., seeing or doing something new and different), intellectual stimulation and opportunities to learn (e.g., enriched perspective on life, new knowledge of history and other cultures or places).

Other cultural activities engaged in by this segment include the following:

Table 11   **[US High Art Performances segment: Cultural and entertainment activities]**

Activity	% of segment participating	Index
Historical sites & museums	81.6%	153
Fairs & festivals	72.6%	177
Fine dining & spas	60.7%	184
Theme parks and exhibits	67.8%	138
Science & Technology exhibits	50.0%	202
Wine, beer & food tastings	45.3%	202
Garden themed attraction	33.7%	247
Theatre, film & music festivals	29.3%	352
Agro-tourism	27.8%	205
Aboriginal exp	21.3%	249

They have relatively **wide-ranging tourism interests**, with a particular **emphasis on other cultural activities**. The majority visited historical sites, museums and art galleries, casinos, theatre and comedy clubs, fairs and festivals, theme parks and exhibits and science and technology exhibits. This segment was also at least twice as likely as the average U.S. Pleasure Traveler to attend theatre, film and music festivals, wine, beer and food tastings and sporting events (e.g., professional sporting events, amateur tournaments, national & international sporting events). They were also more likely than the average U.S. Pleasure Traveler to have visited garden theme attractions and equestrian & western events and

to have taken part in participatory cultural activities (e.g., aboriginal cultural experiences, archaeological digs, participatory historical activities, agro-tourism). Clearly, these travelers consider cultural and entertainment attractions and events to be an important aspect of their travel experience. A third (34.4%) reported that this activity was the main reason for taking at least one trip in the past two years.

They are also **quite active in a wide array of outdoor activities while traveling**. The majority participated in ocean activities (e.g., swimming in the ocean) and wildlife viewing while on trips. This segment was at least twice as likely to go cycling, horseback riding, sailing and surfing, cross-country skiing and snowshoeing, scuba and snorkeling, and exercising and jogging. They were also much more likely to have participated in a 'board & blade' activity (e.g., ice-skating) or an extreme sport while on a trip.

Their wide-ranging interests suggest considerable opportunities for packaging and promotion of cultural, outdoors and wine / culinary tourism. This is significant for Cape Town and the Western Cape as although the performing arts offer is relatively limited, the area is a well known destination for heritage, adventure, wine and culinary tourism. As performing arts tourists participate in these activities, this presents opportunities to offer complementary experiences that appeal to this segment.

High Art Performance Enthusiasts are more likely to consider it important that a destination has mid-range priced or luxury accommodation, direct access by air and a culture that is different from their home. They tend to stay at seaside, lakeside or riverside resorts and exhibited particular interest in luxury accommodation and attractions that feature gourmet cuisine and fine wine (e.g., fine dining & spas, wine, beer & food tastings, inn or resort with gourmet restaurant, winery tour).

The **Internet is a very important tool** for this segment. Most used the Internet for planning (78.0%) and booking (59.8%) travel. They are **avid consumers of travel-related media** but can also be reached through **arts-related media** (e.g., city lifestyle magazines, jazz or classical music radio) and current events media (e.g., newspapers, news radio, news websites).

4.3.3.4 US Fairs & Festival segment

About 69 million US adults (31.7%) have visited fairs and festivals while on an out-of-town, overnight trip of one or more nights. A farmers' market or country fair (14.4%) was the most popular, followed by a fireworks display (12.3%), a free outdoor performance such as a play or concert (10.8%), an exhibition or fair (8.3%), a food or drink festival (7.7%), a carnival (6.9%), an ethnic festival (4.2%) and a circus (3.1%). Some 29.8% (20,824,610) reported that this activity was the main reason for taking at least one trip in the past two years.

Those who visited fairs and festivals on trips are similar to the average U.S. Pleasure Traveler in terms of gender, age, marital status and parental status, however, their **level of education (61.8% university degree or higher) and household incomes ($78,425) are above-average**. They tend to live in large cities with populations of 2 million or more. They traveled more frequently than the average U.S. Pleasure Traveler, and are more likely to have visited overseas destinations.

This segment is more likely to consider it important that a vacation allows them to **create lasting memories and enrich their family relationships.** They also consider it more important that the destination offers unique experiences (e.g., to see or do something new and different), intellectual stimulation and learning opportunities (e.g., enrich your perspective on life, gain knowledge of history and other cultures or places). They are slightly more likely to consider it important that a destination offers midrange priced accommodation and has a **distinctive culture from home**.

They **participate in multiple cultural activities** while on trips. The most popular activities include museums, historic sites and theme parks & exhibits. The following table illustrates the most popular activities engaged in by this segment.

Table 12   [Fairs & festivals segment: Cultural and entertainment activities]

Activity	% of segment participating	Index
Historical sites & museums	71.0%	133
Theme parks and exhibits	65.6%	134
Fine dining & spas	44.5%	135
Science & Technology exhibits	37.9%	153
Wine, beer & food tastings	34.9%	152
Garden themed attraction	23.4%	171
Agro-tourism	23.8%	176
High Art Performance	19.4%	177
Theatre, film & music festivals	15.7%	189
Aboriginal exp	14.8%	172

This segment was more likely than average to have participated in a **wide array of outdoor activities** while travelling. One-half of those visiting fairs and festivals on trips participated in ocean activities (e.g., swimming, sun bathing) and wildlife viewing. Relative to the average U.S. Pleasure Traveler, this segment was especially likely to exercise and jog, cycle and cross-country ski and to participate in a 'board & blade' activity (e.g., ice-skating) or an extreme sport (e.g. extreme air sports, extreme skiing).

They were more likely than average to go fine dining, to visit spas, to have stayed at a country inn or resort with a gourmet restaurant or a cooking or wine tasting school and to have taken a winery tour.

The **majority in this segment use the Internet** to plan (75.6%) and book travel (54.8%) in the past two years. They are **avid consumers of travel-related media** (including websites, newspapers, magazines, television). Home and garden-related programming is also an effective method to reach this segment (e.g., house & home websites, home & garden and cooking TV shows, craft, antique & collectible magazines).

4.3.3.5   Comparative analysis of US activity segments

Although US 'cultural heritage' travellers often participate in range of other tourism activities while travelling, some segments are more active than others. The table below provides information on the activity profile of the market segments described previously,

as well as the 'participatory historical experiences' segment, the most active of the culture and entertainment activity types.

Table 13 [Comparison of US Cultural and Entertainment activity segments]

	Fairs & festivals		High Art Performances		Historical sites, Museums & Art Galleries		Participatory historical experiences	
Activity profile								
Historical sites & museums	71.0%	133	81.6%	153	100.0%	187	92.4%	173
Fairs & festivals	100.0%	244	72.6%	177	54.4%	133	73.3%	179
Theme parks & exhibits	65.6%	134	67.8%	138	57.9%	118	69.1%	141
Fine dining & spas	44.5%	135	60.7%	184	43.3%	131	52.4%	159
Science & Technology exhibits	37.9%	153	50.0%	202	37.6%	152	55.7%	225
Wine, beer & food tastings	34.9%	152	45.3%	202	33.1%	145	51.3%	224
Garden themed attraction	23.4%	171	33.7%	247	22.0%	161	41.7%	305
Agro-tourism	23.8%	176	27.8%	205	19.4%	144	39.9%	395
High Art Performance	19.4%	177	100.0%	917	16.7%	153	31.2%	285
Theatre, film & music fest	15.7%	189	29.3%	352	12.0%	145	26.6%	321
Aboriginal exp	14.8%	172	21.3%	249	14.0%	162	36.1%	421
Archaeological dig	9.1%	184	14.9%	270	9.7%	176	26.9%	487
Participatory hist experience	7.0%	179	11.2%	285	6.8%	173	100.0%	2564

Notably, all US segments are avid consumers of HMAs. Fairs and festivals, Theme parks and exhibits, fine dining and spas are popular activities for all segments. Fans of High Art Performances and Participatory Historical Experiences are overall more active than the other segments in relation to culture and entertainment activities. They are keen participants in science and technology exhibits, and wine, food and beer tastings.

It is clear that the potential market for cultural heritage tourism is much wider than the HMA focussed segment. Cape Town has abundant cultural heritage resources that will appeal to both the HMA focussed segment and other segments that visit HMA during their travels. The challenge then is to strengthen and develop the range of activities that 'offer opportunities to learn', and creatively combine the preferred activities into comprehensive experiences. Furthermore, imagery and messages used in marketing

actions should showcase destination features and characteristics that correspond to the varied interests of these segments.

Table 14 shows that 'cultural heritage tourists' are likely to participate in outdoor adventure tourism activities during their travels, and 'outdoor activity segments' are likely to participate in "cultural activities". The following table illustrates the overlaps in US market segments.

Table 14 [Overlap in US market segments]

	Outdoor activities				Culture			
	Golf	Hiking, paddling & climbing	Ocean activities	Wildlife viewing	Historical sites, Museums & Galleries	High Arts Performances	Fairs & festivals	Participatory historical experiences
Percent of segment	%	%	%	%	%	%	%	%
Outdoor activity segments								
Golf		36.8	58.2	40.3	63.2	16.0	54.6	5.6
Hiking, paddling and climbing	14.9		58.3	66.9	74.2	17.3	58.1	8.6
Ocean activities	15.7	34.6		47.6	64.3	15.1	54.8	5.5
Wildlife viewing	12.3	45.6	53.9		76.6	16.8	60.1	8.4
Cultural / heritage segments								
Historical sites, Museums & Galleries	12.6	32.6	47.6	50.0		16.7	54.4	6.8
High arts performances	16.4	39.3	54.7	53.6	81.6		72.6	11.2
Fairs and Festivals	14.2	33.3	52.9	51.2	71.0	19.4		7.0
Participatory historical experiences	15.2	51.5	55.0	74.6	92.4	31.2	73.3	

Visiting HMA is the second most popular activity for all outdoor activity segments and the cultural heritage activity segments. Fairs & festivals ranks third for four segments, whilst wildlife viewing is the third most popular activity for a further three segments. Although all segments are keen participants in ocean activities, this is the third most popular activity for hikers, paddlers and climbers, the youngest of the segments.

Whereas travellers who engage in participatory historical experiences tend to be the most active segment overall, with relatively high levels of participation across all types of activities, the visiting HMA segments are the least active of all segments analysed.

The table below provides information on the total size and demographic characteristics of each of these market segments.

Table 15 **[Demographic characteristics of US market segments]**

Demographic characteristics				
	Fairs & festivals	**High Art Performances**	**Historical sites, Museums & Art Galleries**	**Participatory historical experiences**
Segment size	69 847 152	18,666,340	91 158 918	6 693 506
Percentage of US adults	31.7%	8.5%	41.4%	3.0%
Average age	45.4	48.4	46.4	49.1
Average household income	$78 425	$89,351	$80 374	$80 394
University level qualification	61.8%	74.2%	65.3%	67.9%

US cultural heritage tourists are usually over the age of 35 and live in adult only households, where there are no family members under the age of 18. Only one third of these tourists take into account the needs of teenagers and children when planning a trip. These heritage tourists also tend to be more affluent than the typical US tourist, with an average household income of $82 136 compared to $74 303 for the typical leisure tourist. Higher household incomes have shown to be consistent with higher levels of formal education and two thirds of US heritage tourists have at least one university degree.

4.3.3.6 <u>Cultural heritage tourism in Alberta, Canada</u>

Of the 25.2 million American cultural tourists, 1.3 million have visited the state of Alberta, with the majority visiting well known historic sites and buildings, which was often stated as the main reason for the trip. About a quarter of cultural tourists to Alberta also visit general history museums followed by historical replicas of cities or towns with re-enactments and science and technology museums (Research Resolutions & Consulting, 2007:4).

One in five American cultural tourists to Alberta comes from the South Atlantic region with the majority originating from Florida followed by California, Texas and New York. For cultural tourists visiting Alberta, most are between the ages of 35 and 44 years and there is an even distribution between men and women. Compared to general American leisure tourists, cultural tourists to Alberta tend to have a **higher socio economic status**, are **university educated** and live in households with at least one person occupying an executive, managerial or professional position. Most of these tourists would also have visited other cultural destinations and attractions outside of the USA (Research Resolutions & Consulting, 2007:6). The following table illustrates the household characteristics of these tourists.

Table 16 **[Race, education, occupation and income]**

Race:		Education:	
Caucasian	86%	High school diploma or degree	15%
African American	5%	Some post-secondary	27%
Asian American	3%	Post-secondary diploma or certificate	10%
Other / Not stated	7%	University degree	46%
Occupation			
Labour force participant	63%		
Retiree	18%		
Executive manager / professional	34%		

Source: Research Resolutions & Consulting, 2007:23

American cultural tourists to Alberta most commonly have a household size of 2 people and are older parents.

In terms of domestic cultural tourists to Alberta, most stated that the main reason for their trip was to visit either art galleries, historic sites and museums, with the majority originating from British Columbia (either Vancouver or Victoria). In terms of age, domestic tourists include younger travellers far more often than international cultural tourists and there is still an equal spread between male and female travellers and travellers also are most often couples who have no children in their home (Research Resolutions & Consulting, 2008:30-33).

4.3.4 *Cultural heritage tourism in Australia*

Research conducted by the Australian Bureau for Tourism Research shows that since 1997 there has been a steady increase in the number of cultural heritage tourists to Australia as well as in their length of stay and their average spend. International cultural tourists are very likely to engage in more than one type of cultural activity while travelling. The most popular activities while in Australia include visiting a history or heritage building, closely followed by visiting museums of art galleries (53%), attending performing arts (23%), visiting arts and crafts workshops (17%), attending festivals of fairs (14%) and visiting an Aboriginal site or community (11%) (Australian Bureau for Tourism Research, 2003: 2).

For the years 2000 – 2001, cultural tourism in Australia represented 13$ of the country's total Gross Domestic Product (GDP) and 26.4 of tourism's contribution. At this time there were an estimated 142 000 people employed in the cultural tourism sector, with the largest number being employed in accommodation establishments, cafes and restaurants, and generating a total of $4.4 billion in wages (Australian Bureau for Tourism Research, 2003: 12-14).

For the four year period over which the research was conducted, the number of domestic cultural tourists in Australia remained relatively static. Although only 12.6% of Australian domestic tourists are cultural tourists, they have a **higher expenditure than other**

tourist groups which accounts for 20.9% of the total overnight expenditure, with an average trip expenditure of $786, which is **66% higher than the national average** (Australian Bureau for Tourism Research, 2003: 2).

During the above research period, an average of 10.5 million domestic cultural daytrips were taken per year, which is over 6% of all domestic day trips taken in Australia. Unlike international cultural tourists, domestic visitors have a **lower propensity to engage in more than one type of cultural activity** while travelling, with the most popular activities being visiting historical and heritage buildings, sites and monuments (Australian Bureau for Tourism Research, 2003: 3).

Domestic cultural heritage tourists in Australia tend to spend most of their budget on accommodation (which may include food) and take away meals while for those who prefer day cultural trips, shopping is the biggest expense (Australian Bureau for Tourism Research, 2003: 10).

The following table illustrates domestic cultural tourism visitors by state and territory in 2008.

Table 17   [Australia: Domestic cultural heritage tourism visitors by state and territory]

	International	Domestic overnight '000	Domestic day
New South Whales	1725	3345	3049
Victoria	919	2643	2418
Queensland	1095	1728	1267
South Australia	257	718	578
Western Australia	394	778	531
Tasmania	116	417	329
Northern Territory	280	219	34
Australian Capital Territory	126	728	307
Total	**2668**	**9667**	**8514**

Source: Tourism Australia, 2009

The table above shows that New South Wales received the highest number of visitors overall. In terms of international visitors, this was followed by Queensland and Victoria for domestic overnight and day visitors.

Tourism Research Australia (2007) indicates that international cultural tourists tend to spend an average of 40 nights in the country, while domestic cultural tourists have an average length of stay of 6 nights. International cultural tourism visitors to Australia in 2007 had a **higher spend on average per visitor** most likely due to a **longer average length of stay**. On average, cultural and heritage visitors from Singapore spent the most per visitor and the most per night. Visitors from the USA and New Zealand also had high spend per night (Tourism Research Australia, 2007).

On average, international cultural heritage tourists to Australia spend a total of $10 billion per annum, or 59% of all international expenditure in the country. The highest expenditure for these tourists is on package tours, international airfares, accommodation and food and shopping, and on average each international tourists spends $4872 during their stay.

Given that these tourists tend to have a longer length of stay than other tourists, this results in increased expenditure on food, accommodation and transport services. Cultural tourists spend the most of their budget on package tours and international airfares and generally tend to have a higher spend than all other visitors to Australia.

The following table illustrates expenditure per person by cultural and heritage visitors in 2007 in Australia.

Table 18   [Expenditure per person by cultural and heritage visitors in 2007]

Expenditure items	International Per person	Domestic overnight Per person
Accommodation, food and beverages	*1 655*	*459*
Domestic airfares	86	102
Other transport	308	135
Organised tours	194	20
Education	602	3
Entertainment	96	40
Other	194	84
Total per visitor	**3 135**	**843**
Total expenditure ($ million)	**9 640**	**10 354**

Source: Tourism Research Australia, 2007

The Australia Council found that visitors from the United States, Canada and Europe have the greatest interest in Aboriginal arts and culture while visitors from New Zealand have the lowest level of interest. The research also showed that the average age of cultural visitors to Australia is **lower** than that for all inbound travellers with the average age being between 20 and 29, and that **female** visitors are more likely to visit cultural attractions. Most cultural tourists surveyed were **professionals** visiting Australia on holiday for a week and were more likely than other tourists to be on their first trip to Australia. The main motivations for these cultural tourists were as follows:

- Artist or professional in industry
- Specifically wanted to attend or visit
- Attended or visited because of family or friends
- Activity or attraction was part of tour package
- A break from normal schedule
- To make new friends and industry contacts

- For an educational experience
- To spend time with friends and family
- To try something new
- Because of the image of the activity or attraction
- For rest and relaxation
- To experience something authentic

Source: Australia Bureau of Tourism Research, 1998: 6-27

The following table illustrates the use of travel packages by international cultural tourists.

Table 19   [Visitors on travel packages by country]

Country / region	Package tour visitors ('000)	Package tour visitors as a proportion of total cultural and

		heritage visitors
Japan	70	53
China	110	55
Korea	63	44
United Kingdom	63	16
USA	55	20
New Zealand	55	15
Taiwan	22	47
Germany	23	21
Other Europe	72	21
Other Asia	51	13
Other countries	30	12
Total	**615**	**23**

Source: Tourism Australia, 2009

During 2007, Australia saw 24% of international cultural and heritage visitors arrive on a travel package, compared to 19% of non-cultural and heritage visitors. Domestic visitors who participated in more than one cultural and heritage activity were more likely to be travelling as part of a package tour (Tourism Research Australia, 2007). The table above shows that the Chinese, Japanese and Europeans are most likely to make use of package tours to Australia.

Most cultural tourists start the trip planning process with a destination already in mind and with a focus on the type of experience that they are looking for. One of the biggest considerations for these tourists is the safety of a destination in terms of criminal activity and health concerns. Other factors which are considered by these tourists are convenient access by car, attractions and potential stop over points along a journey and air access. The **Internet is the most regularly used planning tool** for cultural tourists and these tourists are also deterred from a destination where there are strict passport and visa regulations and where there might be economic problems and political instability (Research Resolutions & Consulting, 2007:8).

At a time of increasing globalisation, the protection, conservation, interpretation and presentation of the heritage and cultural diversity of any particular place or region is an important challenge for destinations worldwide. Cultural heritage tourism represents significant opportunity and growth for Cape Town considering the wealth of cultural heritage resources and attractions within the area.

Tourism Research Australia (2007) reports that the top two cultural and heritage activities for both international and domestic visitors are visiting museums and art galleries, and visiting heritage buildings, sites or monuments. In Australia domestic overnight cultural and heritage visitors travel as adult couples (36%) or in family groups (21%) (Tourism Research Australia, 2007).

4.3.5 Conclusion

Culture and heritage tourists clearly make up a large share of the global tourist market. The following general observations about this segment are important:

- they tend to be more affluent and more educated than the average tourist and can therefore more positively impact the local environment and economy

- they are generally older and most live in adult only households, where there are no family members under the age of 18

- they are generally more active consumers of destination activities than the average leisure tourist

- unique experiences (e.g., to see or do something new and different), intellectual stimulation and learning opportunities (e.g., enrich your perspective on life, gain knowledge of history and other cultures or places) typically appeal to this market. However, some segments also look to their holiday experiences to strengthen relationships and create lasting memories

- although a particular activity may be the main focus of their trips, they usually participate in a wide range of cultural activities including performing arts, museums and local culinary attractions

- their activities are not limited to cultural activity types – in fact, they tend to be relatively keen participants in outdoor activities. The nature of the activities engaged in is generally related to their age profile, with younger segments taking part in more extreme activities

- the Internet is generally an important tool to plan and book trips, and they are generally above average consumers of travel-related media

4.4   Cultural heritage tourism in South Africa

4.4.1   Overview of tourism in South Africa

There were 9.9 million foreign visitors to South Africa in 2009, an increase of 3.6% when compared to the 9.6 million arrivals in 2007.   In 2008, 22% of international tourists to South Africa travelled from other African countries either by land or air, 14.7% were from Europe, 4.2% from the Americas (with the USA being the primary source market), and 3.7% from Asia and Australasia. The majority of tourists to South Africa (57.7%) travel for leisure purposes or to visit friends and family (25.1%). The top source markets for the country are the UK, the USA, Germany, the Netherlands, and France. Between the years 2002 and 2009, the fastest growing sectors in South African tourism included Africa air markets (9.3%), Africa land markets (7.0%), and the America's (5.2%).

The average spend of tourists to South Africa is R8 100 per trip, of which most is spent on shopping for resale, shopping for personal use and accommodation. The most common types of accommodation include friends and relatives, hotels and self catering facilities. Shopping, nightlife and social activities, visiting natural attractions, cultural and historic sites, beaches and wildlife are the most popular activities.

South African Tourism (SAT, 2009) reports that there were 30.3 million domestic trips in South Africa during 2009, down from 32.9 million in 2008. However, while the number of trips per traveller has decreased since 2007, the number of South Africans travelling as increased.

The domestic traveller sector consisted of basic needs older families (42%), young up and coming groups (28.9%), independent young families and couples (5.3%), striving families (3%), well-off homely couples (6.1%), home based low income couples (3%) and golden active couples (1.5%).

4.4.1.1   **Tourism to the Western Cape**

The Western Cape attracted 1.63 million foreign visitors, or a share of 15.4% of the total of 9.9 million foreign visitors during 2009, a decrease of 1.6% over 2008. Even though the province experienced a compound annual growth rate of 3.8% in foreign visitors between 2003 and 2009, the decline in arrivals over the past 2 years reflects the global economic crisis that affected mainly overseas arrivals to South Africa. Due to the crisis, overseas arrivals to South Africa fell by 4% while arrivals from Africa grew by 5.7% resulting in an overall growth in arrivals in 2009. The Western Cape draws mainly overseas international arrivals, and hence the province and Cape Town are particularly vulnerable to downturns in arrivals from overseas markets to global economic factors. The following figure shows a consistent decline in the Western Cape's share of foreign arrivals. This trend is related to the Western Cape's reliance of shrinking traditional markets.

Although the UNWTO expects global demand for tourism in 2010 to grow between 3% and 4%, threats to future growth of outbound travel from the Western Cape's main market remains in place for the foreseeable future. The potential future weakness of the US Dollar against foreign currencies, the volatile fuel price, which resultant airfare increases and/or fuel surcharges and capacity cuts on long hauls flights, might help prevent the growth of outbound travel from the US. The economic downturn will continue to affect European countries, with 2010 expected to see another decline in outbound travel, however it is forecast that from 2011 onwards outbound travel will return to growth.

Figure 5   [International arrivals (2003 - 2009)]
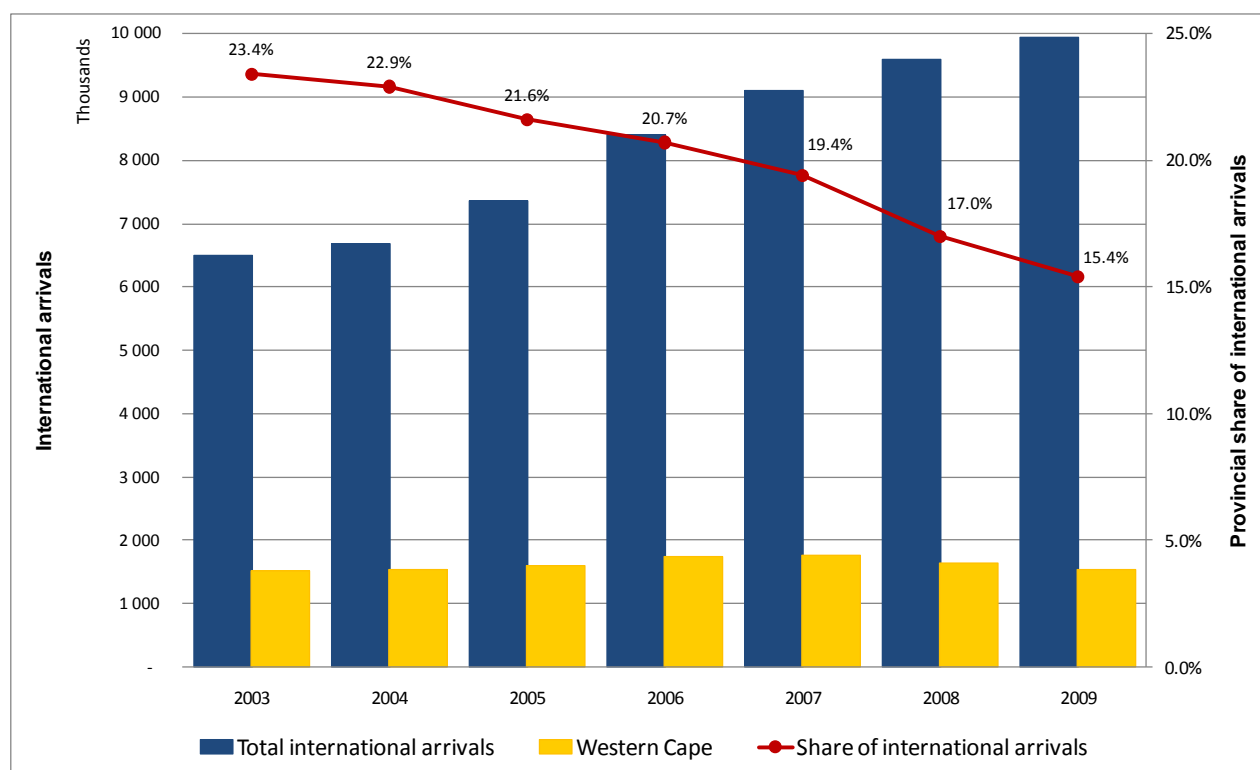
Source: based on South African Tourism annual reports 2003 – 2009

Foreign visitors spent 17.9 million bednights in the Western Cape during 2008, and contributed R 20 billion to the economy. In 2009, the province attracted 21.1 million foreign bednights, and R 20.8 direct foreign spend. The figure below shows a declining share of bednights and foreign direct spend accruing to the province in recent years.

Figure 6   [International bednights and foreign direct spend (2003 - 2009)]
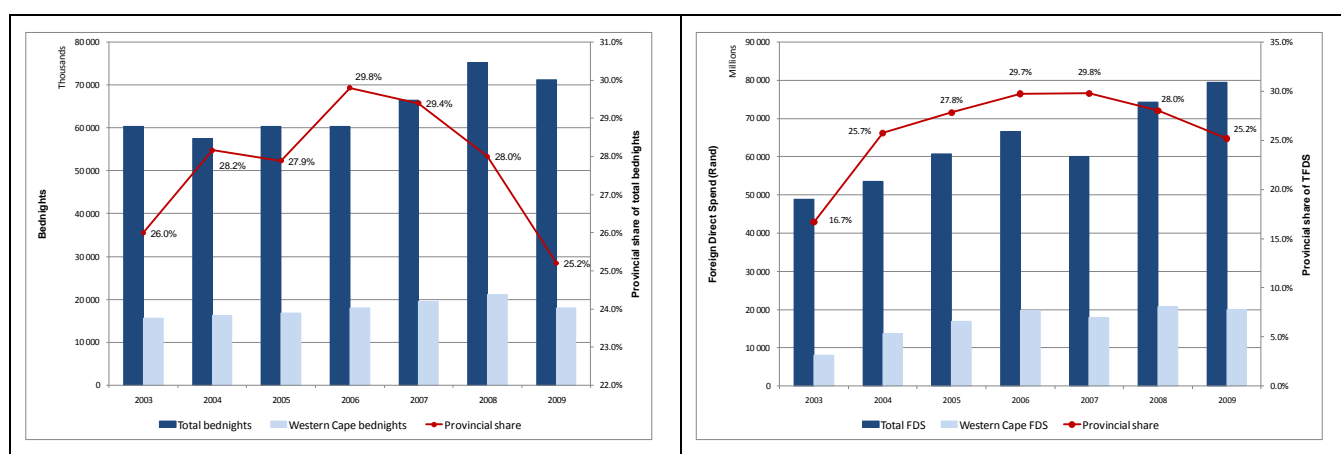
(Based on South African Tourism annual reports, 2003 – 2009)

The national trends set out above must be considered in context of the composition of South Africa's foreign tourism market in general, as opposed to the market profile of the Western Cape's foreign tourists. The Western Cape's primary international source markets are different to those of South Africa in general. Regional markets of Lesotho, Swaziland, Botswana, Zimbabwe and Mozambique are the major source markets for South Africa with the UK, Germany and the USA being the top long haul markets. South Africa's

neighbouring states accounted for 70.2% of arrivals to South Africa in 2008. The majority of visitors to the Western Cape are South Africans (74.2% in 2009) and the smallest percentage hails from other African countries. Countries in Europe were the major international source markets for the Western Cape in 2009, followed by Africa and the Middle East, the Americas, and Asia and Australasia. Of the international visitors to the Western Cape in 2009, most originated from the UK (7.6%) followed by Germany (3.4%), the Netherlands (2.1%) the USA (1.9%) and Australia (1.6%).

Total international tourist arrivals to the Western Cape grew gradually between 2004 and 2009[5], although the province's share of total international arrivals to the country decreased from 22.9% to 15.4%. Gauteng remained the most visited province with 46.6% of all foreign tourists visiting the Province in 2009. The province's share of all market has decreased from 50.8% in 2004. Most international tourists visiting the Western Cape in 2009 travelled on holiday, with VFR in second place[6]. According to the quarterly provincial reports published by SA Tourism in 2003 and 2004, the length of stay of the typical international tourist almost halved from 14 days in 2003 to 8 days in 2004. Unfortunately, these reports were discontinued after 2004 and hence it is not possible to determine whether this trend is also playing out at provincial level. The Western Cape's key source markets also display a growing tendency to travel to the country more than once. For example, 60/2 of European arrivals were first time visitors in 2004, as opposed to 52.9% in 2008.

Table 20 [International tourism to the Western Cape and other provinces, 2009]

Indicator	Western Cape	Gauteng	KwaZulu Natal	Eastern Cape
Tourist arrivals	15.40%	46.80%	12.20%	3.70%
Total direct spend	R 20.0 billion	R 29.9 billion	R 8.3 billion	R 3.4 billion
Bed nights	25.20%	37.70%	10.50%	4.30%

Source: South African Tourism

In terms of the Western Cape's relative position amongst the provinces, its profile in the international tourism market is stronger than in the domestic tourism market. In 2009, the Western Cape ranked fourth as the destination of choice amongst domestic tourists, while Kwa-Zulu Natal was the most popular province. In the same year, the Western Cape was the second most popular province amongst international tourists, behind Gauteng.

There were 3.5 million trips to the Western Cape during 2009, a share of 12% of total domestic trips. The Western Cape attracted 4.1 million domestic trips in 2008, and 4.5 million in 2007. Direct spend by domestic tourists contributed R 2.6 billion to the provincial

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[5] SA Tourism 'Annual Tourism Report' , 2004 - 2008

[6] A breakdown of purpose of visit is not available for 2005, but the pattern is likely to be similar for 2005.

economy in 2009. The following figure shows a declining share of domestic direct spend accruing to the province in recent years.

Figure 7   [Domestic trips and Domestic Direct Spend (2007 - 2009)]
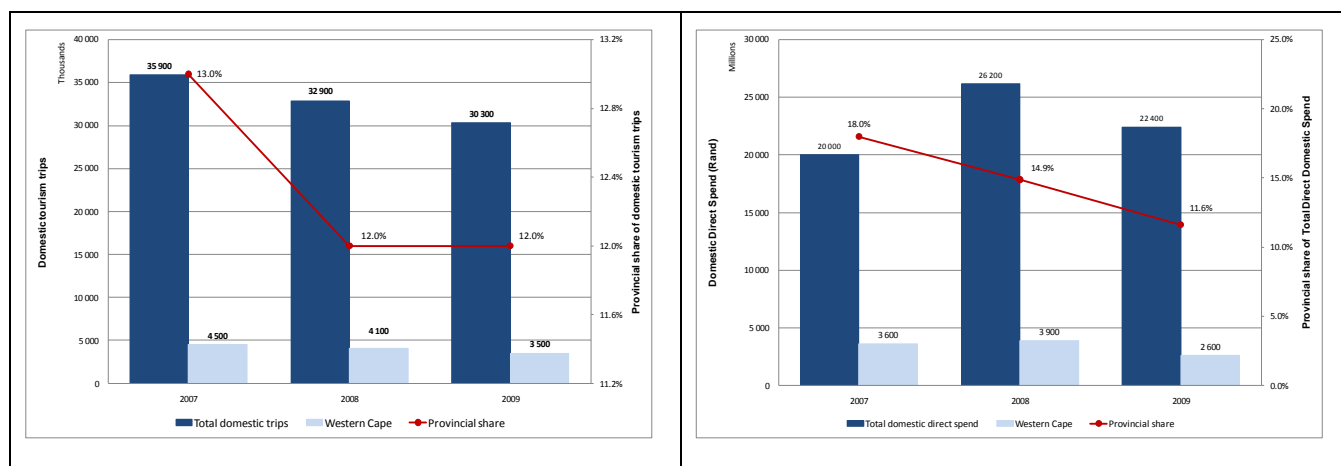
Based on South African Tourism annual reports, 2003 – 2009)

The Western Cape attracted only 7.3% of domestic trips in South Africa in 2005. KwaZulu Natal and Gauteng are the two biggest players in domestic tourism in South Africa. KwaZulu Natal received the most visitors (35.9%) in 2005, mainly as a result of the large number of trips generated from within the province. Gauteng followed in second place receiving 20% of visitors.

The Western Cape captured 12% of all domestic trips within South Africa in 2008. Domestic tourism in the Western Cape consists of both inter (from other provinces) and intra (within the same province of residence) provincial visits. The domestic tourism market in the Western Cape is far bigger than international tourism in terms of arrivals. The fact that the Western Cape is itself the biggest source market for domestic tourism (i.e. intra provincial visits account for 69% of domestic tourism trips) indicates that the Western Cape population is an important source market for any destination within the province.

As is the case at the national level, the most common purpose of visit to and within the Western Cape is Visiting Friends and Relatives (VFR), followed by holiday, religious and business reasons. However, the Western Cape has a comparatively higher proportion of holiday visitors. These are the most valuable tourists as they stay on average the longest and they spend more.

Popular destinations in the Western Cape

Cape Town Routes Unlimited commenced with provincial surveys during 2006 to gather detailed information about tourist volumes and demand levels at a regional level. During the 2008/9 December to January tracking period, visitors visited an average of 2.3 Western Cape regions. International visitors visited an average of 3 regions, while domestic visitors visited an average of 1.8 regions. The most-visited regions include Cape Town (69%), the Winelands (54%) and the Garden Route and Klein Karoo (50%). Almost all international visitors (93%) had visited or intended to visit Cape Town, while the corresponding figure for domestic visitors is considerably lower (41%). The Winelands, as well as the Garden Route and Klein Karoo are particularly popular destinations for international visitors, while domestic visitors are more evenly spread around the province.

4.4.1.2   Tourism in Cape Town

According to surveys conducted for Cape Town Routes Unlimited, on average 94% of all foreign visitors to the Western Cape visit Cape Town during their stay. Assuming this level of visitation, Cape Town received 1.44 million foreign visitors in 2009, 1.53 million foreign visitors in 2008, and 1.66 million in 2007.

In 2009, the City of Cape Town commissioned a study to determine the value of tourism to the economy.   To determine the value, the consulting firm Grant Thornton used SA Tourism demand side data, or data on foreign direct spend (FDS) in South Africa and the Western Cape, together with their own estimates of the share of foreign bednights spent in Cape Town.   Assuming that 68% of FDS takes place in Cape Town, the economic value of tourism in Cape Town was estimated at R 14.6 billion in 2008, representing an increase of 21% over the R 12 billion in 2007 (Grant Thornton, 2009).

4.4.2   Cultural heritage tourism in South Africa

South African Tourism (SAT) reports that in 2008, apart from shopping, nightlife and social activities (activities typically undertaken by most foreign tourists globally), visiting natural attractions, cultural and historic sites, beaches and wildlife were the popular activities undertaken by foreign tourists.   Natural attractions drew 23% of all international visitors to South Africa, leading cultural, historical and heritage based activities that attracted only 17% of international visitors. Overall, a trend of declining visitation to both natural and cultural can be seen in the figure below.

Figure 8   [Activities of international tourists to South Africa]
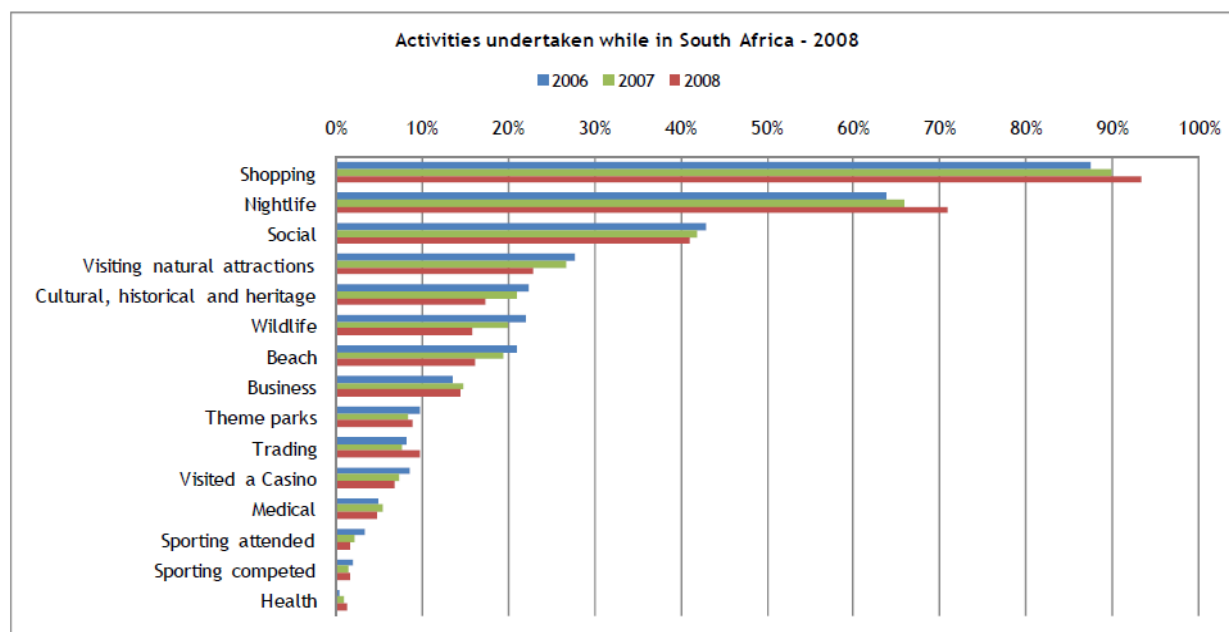
Source: South African Tourism: 2009: 59

However, different source markets have different activity patterns. The 2008 SAT Annual Report (SAT, 2009), reveals that 53% of tourists from the Americas visited cultural, historical attraction, 43% of visitors from Asia and Australasia, and 47% from Europe. The level of participation by US tourstst is on par with the level in the Canadian TAMS research. In

contracts, 9% of all visitors to South Africa from other African countries, mainly from Namibia, Kenya, Angola, Malawi, Nigeria and Tanzania, visited a cultural, historical or heritage attraction. The comparative figures for 'visiting natural attractions' and 'wildlife' are: Americas – 74% and 66%, Asia and Australia - 60% and 46%, Europe - 77% and 63%, and Africa 9% and 4%.

Figure 9   [Activities of selected source markets]
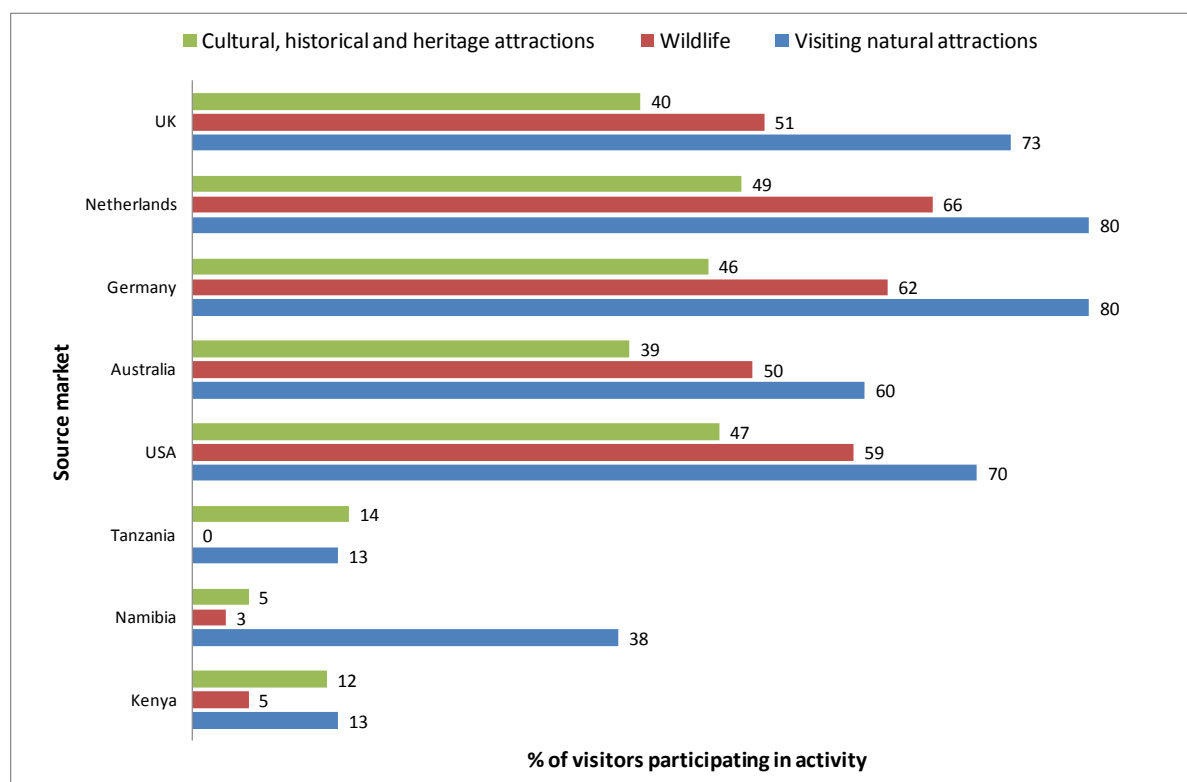
Analysis of the activity patterns of different source markets from year to year traces the source of the decline in visitation to cultural, historical or heritage attractions to the Africa and Middle East grouping of source markets. The visitation level of other source markets has remained more or less constant.

Participation in activities at a destination is linked to the visitor's purpose of visit. The figure shows that 'holiday' tourists are most likely to visit cultural, historical or heritage attractions.

Figure 10   [International tourists: Activities by purpose of visit]

Activites by purpose of visit - 2008									
	Holiday	Shopping - Personal	Shopping - Business	Business traveller	Business tourist	Medical	VFR	Religion	Other
Shopping	96%	99%	90%	90%	88%	71%	96%	93%	92%
Nightlife	92%	63%	49%	81%	78%	40%	65%	75%	81%
Theme parks	22%	2%	2%	8%	5%	1%	8%		11%
Trading	1%	3%	60%	3%	2%		1%		1%
Visited a Casino	15%	2%	1%	6%	6%		7%		6%
Sporting competed	2%			6%			1%		2%
Sporting attended	2%			1%			1%		11%
Business	2%		2%	76%	68%		1%		3%
Cultural, historical and heritage	43%	3%	1%	12%	13%	1%	19%		17%
Wildlife	53%	1%		14%	9%	1%	9%		15%
Visiting natural attractions	64%	2%		19%	14%	2%	20%		23%
Beach	42%	1%	2%	13%	11%	2%	13%		20%
Social	34%	35%	11%	14%	14%	37%	90%	40%	26%
Medical	2%	1%		0%		81%	2%		1%
Health	1%			0%		13%	1%		1%

Source: South African Tourism: 2009: 59

The level of visitation to cultural, historical and heritage attractions by international holiday tourists has ranged between 42% and 47% since 2004.

Domestic tourists engage mostly in unpaid activities, such as social activities associated with VFR travel. A very small minority of domestic tourists visit cultural, heritage or historical attractions when travelling in South Africa.

Figure 11   [Domestic tourists: Activities]

Note: Percentages do not add to 100% because respondents were allowed to choose more than one activity
Source: SAT Domestic Surveys for 2007-2009
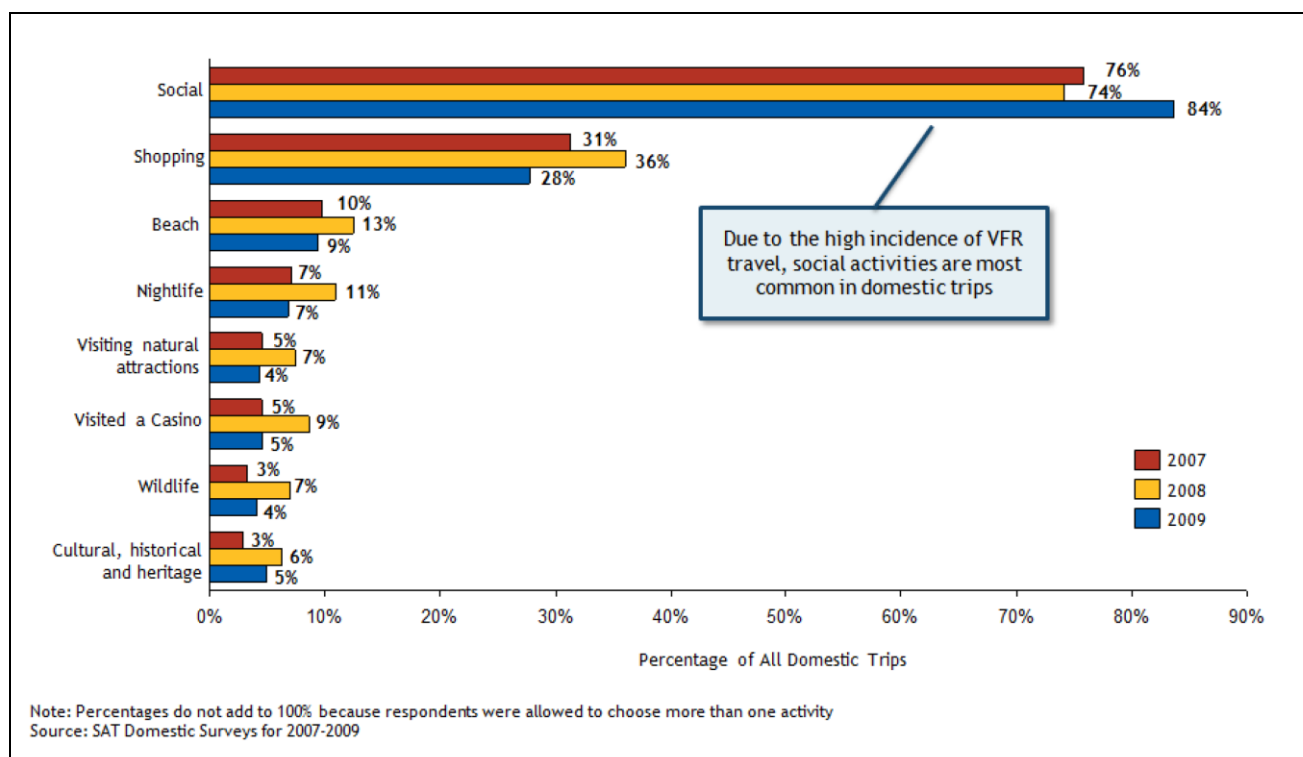
There is an established trend of shorter lengths of stay by international tourist to South Africa. It is likely that this trend is reflected at provincial level. The implication of this trend is that international visitors to South Africa have limited time, and first time visitors are therefore unlikely to include anything more than national icons such as Robben Island, Table Mountain and Kruger Park in their itineraries.   The trend of shorter stays is counterbalanced by the tendency of international visitors to travel to South Africa more than once in a lifetime. More than half (50.1%) of tourists that visited SA in 2004 were repeat visitors. In 2008, only 15.9% of foreign tourists were first time visitors. In 2008 there were increases in the number of tourists who have visited South Africa 2 – 3 times, 4 - 5 times and 6 - 9 times.   These 'repeaters' tend to travel independently, often renting cars and travelling through the countryside to lesser-known places.

The Global Competitiveness Study (GCS)[7] analysed the current product offerings of the South African tourism industry and identified the following relevant shortcomings:

- Poor quality and limited diversity of cultural experiences

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[7] 'Global Competitiveness Project: Phase 1' 2005 by DEAT, dti, & SA Tourism

- Limited number of rural tours

- Limited number of niche tours

The low level of consumption of cultural and heritage tourism experiences by both international and domestic tourists, and the shortcomings identified by the GCS represent opportunities for heritage destinations such as Cape Town. Cape Town's success with both domestic and international tourists will depend on the extent to which it can differentiate itself and channel information regarding the experiences on offer through to the international market. The GCS also found that although domestic tourists have a relatively strong desire to experience cultural, historical and heritage tourism, the actual usage of these products or experiences is low. On an index of 0-100% where 100% is the maximum, the desire to experience cultural and historical heritage is rated as about 55%, but the usage profile is less than 5%. In other words, although South Africans value their cultural and historical heritage, they do not actively seek out or use cultural tourism products and experiences. The same observations were made for the 'natural attractions' segment which performs only slightly better than the 'culture and history' segment. Some explanations for this behaviour include lack of familiarity with cultural products, access constraints and apathy to travel.

International tourists display the opposite trend - their use of cultural, historical and heritage experience is higher than their actual desire for them. On an index of 0-100% where 100% is the maximum, usage of cultural and historical heritage experiences was 45% whilst desire for them was about 37%. The study also shows that existing product offerings do not to meet their needs. The challenge would therefore be to increase their understanding, appreciation and enjoyment of South African cultures and lifestyles as this will translate into even higher usage than is currently the case. Emphasis should be placed on the quality of the product, as well as contextualising a destination's background within the general history of the country so that foreigners can better understand the linkages between national and local events. Applied to Cape Town, this would mean ensuring that Cape Town's history is not presented in isolation but is associated with happenings elsewhere in the country, the Southern African region and internationally.

4.4.3 *Cultural heritage tourism in the Western Cape*

Demand for cultural attractions

According to CTRU research, the most popular activities for all visitors are Visiting Beaches (78%), Scenic Drives (76%), Visiting Nature Attractions (62%), Gourmet Restaurants (58%) and Wine Tasting (51%). Wine Tasting is more popular with international (61%) than domestic visitors (39%). Township Tours (9%), Gambling (9%) and Golfing (10%) are not particularly popular activities.

Visiting beaches and scenic drives were the two most popular activities for international tourists visiting the Western Cape in 2008/9. Three quarters of tourists participated in these activities, whilst visiting natural attractions ranked third, attracting nearly two thirds of all international tourists. Culture, history and heritage sites and activities attracted an average of 45% of international tourists during 2008, mirroring the SAT findings on activity

patterns. Domestic tourists were somewhat more likely to attend festivals, and very unlikely to participate in a township tour.

Domestic tourists were somewhat less inclined than international visitors to visit natural attractions. A significantly lower portion of domestic tourists indicated that they visited cultural facilities – however, the percentage indicating visiting cultural facilities (25%) is fivefold the percentage indicated in the national domestic survey. This is likely a result of the specific profile of the domestic traveller to the Western Cape – i.e. more affluent, more educated and older than the average domestic tourist.

Table 21   **[Activities participated in/will participate in]**

Activities	All (%)	Int. (%)	Dom. (%)
Visiting beaches	78	75	82
Scenic drives	76	72	80
Visiting nature attractions	62	64	59
Gourmet restaurants	58	55	61
Wine tasting	51	61	39
Walking or hiking in a natural area	46	49	43
Flea markets/Craft markets	37	36	38
Visiting cultural facilities, eg. museums	35	45	23
Adventure sport	30	29	31
Nightlife	25	26	23
Whale watching	20	23	17
Attending live shows (theatre, concerts, comedy)	17	16	17
Festivals	14	13	15
Visiting a spa (beauty and health treatment)	14	13	15
Golfing	10	9	10
Gambling	9	6	12
Township tour	9	16	2

Source: Cape Town Routes Unlimited, 2009a:19

For visitors to the Western Cape, the most popular cultural heritage attraction is Robben Island. The following image illustrates the visitor numbers to Robben Island for the years 2006 – 2009.

Figure 12   **[Visitations to Robben Island]**
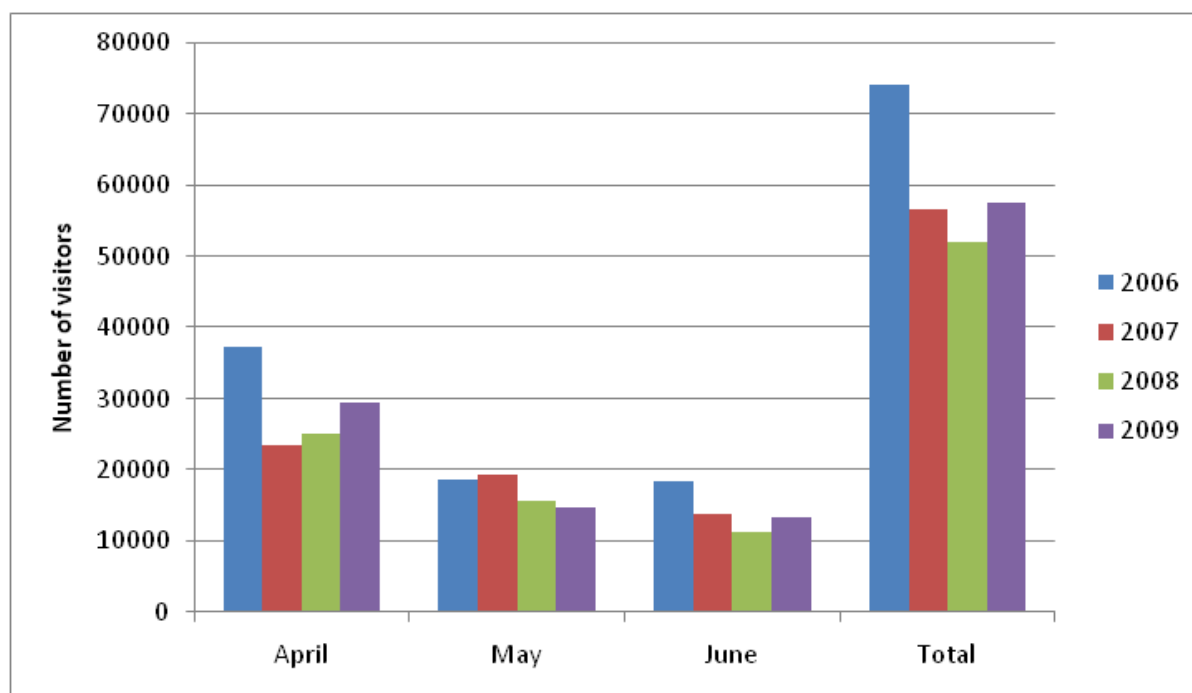
Source: Cape Town Routes Unlimited, 2009b:14

The figure above shows that the highest numbers of visitors to Robben Island were received in 2006, followed by 2009, 2007 and finally 2008. The lowest numbers of visitors across the 4 years were received in June as this is the winter month when the ferry cannot always take passengers due to rough seas.

A significant portion of visitors to the Western Cape also visited the province for its food and wines (which is also included in the cultural tourism category) (Cape Town Routes Unlimited, 2009:20).

5   Analysis of constraints and opportunities

One of the defining characteristics of Cape Town as a city is the unequal distribution of resources and opportunities as a result of apartheid planning and racially based legislation. This has affected all aspects of Cape Town, particularly for the poor and marginalised communities. The historical inequitable growth and development of the City based on racial lines, has had an impact on issues around access to and distribution of heritage resources. Access and affordability are affected by distances as the poorest residential environments are generally situated far from the city centre, which the major cultural resources and museums are situated; and public transportation is poor, intermittent and expensive.

Historic built environments throughout Cape Town and environs were affected by the Group Areas Act, which played a pivotal part in apartheid planning in the Western Cape and beyond. The linkage of racial classification and spatial segregation resulted in the forced removal of many people of colour from their environments and communities which had historic origins. Such historic environments included: Cape Town (Green Point, District Six and the Loader Street area), Mowbray, Rondebosch, Claremont, Wynberg Village, Kalk Bay and Simon's Town. In some cases e.g. in District Six, historic townscapes were demolished and communities scattered. In other cases historic settlements were acquired by white landowners and have been subject to an extensive process of gentrification.

Gentrification of heritage environments is a worldwide phenomenon, but in the case of Cape Town (and South Africa generally) has a unique and troubling racial component.

In addition, apartheid planning resulted in a structural urban plan based on race, control and inequality including the building of dormitory sites away from the historic core of the city. The inherent problems of structural and urban inequality as well as historical injustices remain and affect the cultural tourism experience, among other issues.

The legacy of apartheid planning is also evident in the spread and scope of heritage institutions: museums and other places of interpretation are, with a few notable exceptions, based in historically white areas of the city and the narrative, again with a few exceptions tends to focus on colonial history. Sites identified as having national and heritage significance tend to relate to the dominant narrative. Heritage institutions, organisations and places are without exception under-resourced.

A second defining characteristic of the city is its cultural diversity. This is the result of many cultural influences in its history from the west and the east and from the north to the south. This has resulted in a unique cultural environment and one which affects all aspects of Cape Town from local cuisine to music and from street culture to art and architecture.

The cultural heritage sector is fragmented. Institutions and organisations have little contact with each other and often less with the City's communities. Communication is poor. More alarming however, is the lack of imagination and will to effect change; the general malaise that paralyses creative action and inhibits creative response to the

current circumstances. Collectively, these factors represent both constraints and opportunities.

The legacy of apartheid planning is evident in the spread of places where the City's cultural heritage is interpreted and presented.

- **Constraint**: It is not possible to provide visitors with the opportunity to understand or explore the City's history and cultural heritage, in the absence of appropriate interpretive infrastructure or interventions in all parts of the City.
- **Opportunity**: To develop appropriate interpretive interventions in areas where these are sorely lacking, for local residents and for tourists.

Cape Town has a rich and varied history and heritage. This narrative is not reflected adequately through the institutions and places through which it is presented to the public.

- **Constraint**: This constrains cultural heritage tourism initiatives aimed at narrating an inclusive history of the City.
- **Opportunity:** There is an opportunity to develop a more inclusive narrative that better reflects the story of Cape Town by broadening exhibitions in existing institutions, identifying gaps and creating appropriate interventions to address these.

Cape Town is a culturally diverse city. This is evident in its rich and diverse cultural life and the diversity of its people, cultural traditions, practices and belief systems.

Constraint: Embracing and conserving unique aspects of cultural diversity in order to protect the richness of cape culture has major challenges. Cultural traditions and practices should be conserved and enhanced not purely as a tourism endeavour but in order to protect and enhance the unique qualities of the city as an expression of local and cultural identity. At the same time, tourism interest and investment may be used as a dynamic force to fund investment, and upgrading of cultural resources in order to enhance the life of the city.

Opportunities: To identify potential interventions to facilitate interaction between visitors and with local people in ways that offer authentic experiences and insights into the cultural diversity of the city, without unduly compromising the cultural heritage resource. To identify heritage related projects that will result in the upgrading of cultural facilities of interest to the tourism sector while at the same time enriching the cultural life of the city.

The scenic landscape quality of Cape Town, including its unique sense of place and the relationship between historic environments and scenic contexts is one of the major reasons for its success as a tourism destination. This has been compromised by development initiatives which have failed to respond sensitively to the cultural value of the landscape.

- **Constraints:** Inappropriate developments have adversely affected the cultural landscape context in parts of the Metropolitan area and the context of historic farms, such as particularly wine farms which have cultural tourism value.
- **Opportunities:** There is an opportunity to facilitate more effective links between the conservation of the cultural landscapes, the cultural heritage tourism experience and the cultural life of the city. This may involve: Recognising the cultural landscape as a

heritage and scenic resource and combining cultural and environmental appreciation through interpretation and the enhancement of cultural resources within the cultural landscapes; acknowledging the positive role of cultural tourism as part of a local economy, when planning and environment decisions are made that adversely impact upon the cultural landscape, and taking adequate steps to protect scenic, historic cultural landscapes and those with social/recreational value which will ultimately affect the tourism; making use of historic urban spaces for cultural expression such as exhibitions, marches, protests and places of interpretation and celebration. The use of the Grand Parade as a fan park for the 2010 World Cup and as a backdrop presenting the regional and scenic qualities of Cape Town exemplifies the manner in which the City seized this opportunity.

Cape Town's historic built environment is a major resource and arena for the cultural tourism experience. Cape Town's built environments of cultural significance are the result, not only of age, rarity and architectural significance, but of historical events and struggles that have shaped the history of the region and contributed to its identity and sense of place.

- **Constraints**: Loss or degradation of the built environment compromises the cultural heritage resource, and therefore impacts on the potential for the development of cultural heritage initiatives in a number of ways: Loss of historic fabric detracts from the unique character, sense of place, scale and of regional sense of place. Developments which result in the loss of authenticity of the fabric and life of the city ultimately adversely affect the tourism experience

- **Opportunities:** conservation of the historic environment provides the resource base on which cultural heritage tourism initiatives can be built and may contribute to the broader regeneration of the City. Cultural revitalisation and restoration is a strong generator of cultural tourism interest. In Africa, the revival and restoration of historic environments have contributed enormously to tourism development and success in places such as Stone Town Zanzibar

A major weakness in the presentation of cultural sites for tourism purposes is ad hoc, disparate and generally weak heritage related interpretation. In the absence of a consolidated interpretation mechanisms and methods of presentation, interpretation has partially become the domain of private organisations.

- **Constraints:** Lack of coordination and a shared vision, have lead to a fragmented narrative and a dilution of identity and a strong sense of place.

- **Opportunities:** This presents a number of opportunities including: the development of a cohesive strategy for the interpretation of cultural sites and sites on cultural interest based on a study of international best practice; the potential to link of sites of thematic interest through historic walks and routes. These may include routes followed by historic marches, routes linking military sites and routes linking historical and architecturally themed sites.

Much of the cultural expression of contemporary Cape Town – food, music, arts and crafts, performances, etc - is rooted in its history and heritage and reflects the diversity of its people.

- **Constraints**: It is difficult to determine the boundaries between heritage and culture and thus focus the scope of work to address current gaps in the broader and product offerings. One the one hand, there is a risk that the strategy will be diluted by too broad a focus. On the other, that a narrow focus will not do justice to the character of the city, or the way in which visitors may experience it.

- **Opportunities**: Various studies, analyses and strategies have been commissioned by various city stakeholders. These include, for example, studies on township tourism, the cultural ecology of Cape Town and various others by organisations such as Creative Cape Town, the Cape Town Partnership, Cape Town Tourism and the Cape Town Heritage Trust. The findings and recommendations of these should be taken into account in the development of the cultural heritage tourism strategy. This will provide opportunities to acknowledge and support contemporary cultural activity, offer fresh perspectives to the interpretation of historical sites and add substance to the tourism experience.

The development of the cultural heritage tourism strategy has the potential to bring together uncoordinated initiatives to promote a strong identity for the City of Cape and to impact on the conservation of the built environment.

6   Conclusion

Africa has a long history of multicultural influences shaping societies along the coastline of the continent. To the north, southern European and Arabic cultures have shaped and formed the landscapes, architecture and settlement patterns of the region. To the west, European colonists have left their mark upon the countries situated on the Atlantic coastline; on the East Coast the Arabic and Asian traders have influenced cultural patterns.

Cape Town, at the southernmost tip of Africa, is unique in that it has served as the crossroads for all of these nations, and the city and its surrounds bears testimony to having been moulded by the influences of these diverse peoples and the impact of these people on the indigenous inhabitants.

The cultural landscape of the Western Cape has been shaped by a complex mixture of influences brought by explorers and colonists from Europe as well as travellers from the East Indies and Asia. Like other South African cities, it has been shaped too by the movement of black South Africans, their exclusion during the apartheid era and their inclusion in more recent years. It is the rich and diverse mix of histories and cultures that gives Cape Town its unique identity.

This story is not adequately reflected in the way in which the history of the City is reflected in its heritage sites and places of interpretation. There are opportunities to refocus the City's identity as a port city at the tip of Africa, promote a sense of place which

demonstrates a unique culture, and way of life in an extraordinary natural setting and its contemporary character as a modern, vibrant urban environment.

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Appendix A

Output	Actions
Output 1.2 A Cultural and Heritage Tourism Development and Marketing Plan and Programme of Action is adopted so as to 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	**Industry communication and coordination** 1.2.1 A CoCT Tourism Development and Arts and Culture partnership reference group is established. 1.2.2 Joint planning and liaison between arts, heritage and tourism in all future planning of cultural infrastructure with likely tourism impacts is ensured 1.2.3 An annual meeting of key players in arts, culture and tourism is held (Cultural Tourism Conference) **Strategic planning** 1.2.4 An industry working party (Product Development Cluster) consisting of tour operators; local marketing agency; heritage, arts and cultural sector; CBOs; etc. formed to lead the development of a Cultural and Heritage Tourism Development and Marketing Plan. 1.2.5 Interact with provincial Department of Cultural Affairs to identify opportunities for provincial packaging **Research** 1.2.6 Research on the cultural and heritage tourism sector designed to gather economic impact data and publish estimates on the size, scope and economic impact of cultural and heritage tourism as a whole in Cape Town is conducted. 1.2.7 Cultural and heritage tourism market research aimed at gaining a greater understanding of the market in terms of the size of the market, visitor characteristics, their motivations, and satisfaction with the cultural and heritage tourism experience in CT and their related product preferences is carried out. 1.2.8 A regular monitor of cultural and heritage tourism, detailing visitor numbers and operator views, is included into the Western Cape's tourism statistics. 1.2.9 Produce and disseminate in user friendly formats, current research on cultural tourism, which can be used for planning, marketing and training. 1.2.10 Work with provincial counterparts to advocate for and undertake research on cultural tourism in the Western Cape. 1.2.11 Make fact sheets on cultural tourism available on the CoCT and Western Cape web sites. **Product & support infrastructure development** 1.2.12 The City of Cape Town supports the showcasing and revitalization of the lifestyles and cultural heritage of Cape Town's communities in preference to "imported" cultural practices and artefacts by backing the development of indigenous performing, visual and material arts and local craft 1.2.13 The development of a Cape Town mark of authenticity - "Cape Town made" is investigated 1.2.14 An audit of "market-ready" cultural product is undertaken. **Information provision and marketing** 1.2.15 A comprehensive database of emerging local suppliers of cultural goods and services is developed and published through the Internet.

	1.2.16	An advocacy campaign to encourage tourism businesses to source a greater proportion of locally produced goods and services from local suppliers is launched.
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	1.3.1	An opportunity to provide a 'bird's-eye' view of the unique Cape Town setting, historical layout and development over time by developing a low-impact city lookout and "The Story of Cape Town Experience" against the mountain backdrop is investigated.
	1.3.2	The city's traditional historical buildings and sites are woven together in a 'city timeline' by linking individual assets and sites more closely via walking trails and routes.
	1.3.3	Tourism products are enhanced by a variety of interpretive methods that tell the stories of places and people, including innovative approaches such as the use of oral history 'sound posts', cartoons and fresh and contemporary design idioms.
	1.3.4	Places where visitors stop and congregate such as parks, streets, civic places, significant heritage sites, wineries, rest stops, key vistas and lookouts are interpreted.
	1.3.5	Opportunities for redevelopment and revitalisation and historical buildings, places and precincts as part of heritage product development are identified.
	1.3.6	The Tourism Development Branch provides input into Urban Regeneration Frameworks developed by Urban Conservation.
	1.3.7	School children are encouraged to be more knowledgeable and proud of their city by linking educational curriculum with visits to Cape Town's special and significant places.
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	1.4.1	High-quality public art projects that contribute significantly to the communication of 'place' which is vital to the marketing of the destination are encouraged.
	1.4.2	Conference organisers are encouraged to integrate a strong arts and cultural component via venue selection, entertainment, gifts, partner programs, and pre- and post conference tours.

Tourism Development Area Investment Framework

CITY BOWL			
Issue	Key action	Lead agency	Partners
Creating identity	Attention to conserving significant architecture (i.e. Art Deco, Victorian, Edwardian), and future enhancement through adoption of interpretive signage and architectural walks in order to reinforce the character of the city.	CoCT: Urban Conservation CoCT: Tourism Development	SAHRA Cape Town Heritage Trust Cape Town Tourism
	Showcase the facades of heritage buildings and key public spaces at night through strategically placed uplighting. Examples include Moscow, St Petersburg, San Francisco.		
	Develop a collaborative City-property owner's interpretive signage programme for significant buildings and spaces as the base for thematic heritage walks.	CoCT: Urban Conservation	Cape Town Heritage Trust

	Improve the visibility and prominence of the City's museums through the creation of a Cape Town 'Museum Mile' designated by special pavement plaques, (e.g. Melbourne Golden Mile) and packaged with other attractions	Iziko Museums	SAHRA
	Lend interest to the city's fabric and informing residents and visitors of Cape Town's historical development as a port city by indicating the former shoreline of Table Bay (before the reclamation of the Foreshore) by means of signage, custom-designed bollards or pavement markers used in conjunction with a series of historical photographs of the City Bowl and shoreline activities	CoCT: Urban Conservation SAHRA	Cape Town Heritage Trust SAHRA Cape Town Tourism
	There is potential to create an "Artist's Quarter" similar to Montemarte in Paris in the East City. The aim is to develop a quarter that will attract young people. There is a pool of students and notably young and trendy professionals in the city. Attracting fashion designers, artists, writers, students etc. to the City Bowl to live, work and play will inject new life.	Cape Town Partnership	Private sector
	Capitalise on underdeveloped land around the Artscape to add a new dimension to the City Bowl. This precinct already has a "cultural jewel " i.e. the Artscape Theatre and together with the Central Area's strong cultural products there is the opportunity to link the various precincts. Linking a Performing Arts precinct into the envisaged redevelopment of the Grand Parade, Cape Town Station and refurbishment of City Hall provide the opportunity to achieve critical mass not only from a tourism perspective but also a commercial one.	CoCT: Planning Cape Town Partnership	Cape Town Partnership
Public space and places	Create a pedestrian network linking squares and public open spaces such as Riebeeck Square, Greenmarket Square, the Grand Parade, North Wharf square, and the CTICC square to reinforce legibility and connectivity, and enhance both visitors' and residents' experience of moving between areas.	CoCT: Planning	
	Link the Mountain to the Sea through the creation of a network of green spaces and public squares, reinforced through a street tree programme that establishes movement routes and linkages.	CoCT: Planning	
	Use the city's open public spaces as canvas for public art works – sculpture, murals, mosaic, decorative planters, fountains, etc. – to reflect Cape Town's multi-cultural population and creative vibe	CoCT: Tourism Development Cape Town Partnership	
	Use streetscaping, landscaping and signage to define and characterise spaces – this is critical in highlighting the diversity of experiences. Tourism signage should be consistent throughout the City, with signage for major attractions and facilities being in line with overall signage policies.	CoCT	
	Consolidate informal trade into well-managed markets or festival retail zones to create additional tourism assets for the city.	Cape Town Partnership COCT: Informal trading	CoCT: Economic Development

	The Foreshore has an important role as a distribution point to experiences exposing international and domestic tourists to the history and cultural diversity of Cape Town. The precinct should serve as "springboard" for walking tours of the city, District Six and Malay quarter and guided tours focussed on the cultural experiences offered by Langa, Khayelitsha, Gugulethu and others. Consistent directional signage from this area, and information provision at the CTICC, will be important to ensure that visitors are able to find their way to other precincts and other areas of Cape Town.	Metropolitan Transport CoCT: Tourism Development	Cape Town ICC Cape Town Tourism
	Streetscaping and landscaping throughout the area, but especially along the full length of the promenade must be ongoing. For example, trees, signage, light posts, litterbins, streetscape design elements etc.	CoCT: Parks and Amenities	CoCT: Parks and Amenities
	The Mouille Point lighthouse precinct could include a lighthouse interpretive centre which serves as distribution point to lighthouses and shipwrecks along the coastline.	CoCT: Tourism Development	Ports Authority Cape Town Tourism
	Spatial and movement linkages with other areas of significance such as the Roggebaai Canal Precinct, CBD, de Waterkant, and the V&A Waterfront are fundamental to bring the Framework together; they must therefore be strengthened. Establish pedestrian walkways and cycling paths along the boulevard linking into the footpath and cycling path systems of the CBD and V&A Waterfront. South of France, San Francisco, Vancouver, Copenhagen, etc. offer examples of achieving such ambience and functionality.	CoCT: Planning	

RONDEBOSCH TO WESTLAKE

Issue	Key action	Lead agency	Partners
Gateway areas	Enhance the role of Constantia Nek as a gateway into the National Park and 'hub' of tourism flows in the metropole through provision of: ⇒ directional signage and information provision (distribution platform); ⇒ secure, non-intrusive parking (inter-modal exchange point - road to foot); ⇒ watering and rest points for runners, hikers, bikers and horse-riders; litterbins; toilet facilities; benches, etc. set in a clean and attractive setting (rest area); and ⇒ non-intrusive facilities for artists' market; restaurant/ tea room (destination).	Cape Peninsula National Parks Forum SANParks	Branch: Tourism Development
Building identity	Delineate the Wynberg Historical Walks walks through interpretive signage and route markers.	Wynberg Improvement District Cape Town Tourism	
	The military history of the Rondebosch and Wynberg area could be further developed as part of the tourism focus in this area.	Wynberg Improvement District Cape Town Tourism	

PENINSULA			
Issue	Key action	Lead agency	Partners
Building identity	Hout Bay Harbour serves as a busy embarkation area for ferrys to Seal Island, a boat repair area and active fishing harbour. Kalk Bay offers the colour and sound of the local fisherfolk. These elements are key ingredients of the character of the coastal villages of the Peninsula and maritime features such as fishing boat moorings, fish markets, boat repair, boat trips, etc. must be valued and supported for their attraction value.	CoCT: Planning	
	Continue to protect the aesthetic and historical value of the architectural and built heritage through urban design frameworks, architectural guidelines, statutory protection under the Heritage Resources Act, proclamation of conservation areas, etc. is in order to maintain the uniqueness of the coastal villages.[i] However, unnecessary bureaucracy and administrative delays in the processing of planning applications for the renovation and re-use of historical buildings should be avoided.[ii]	CoCT: Planning CoCT: Urban Conservation	SAHRA
	Depict the maritime history, architecture and atmosphere of the past through the restoration of neglected buildings, interpretation of buildings and places, guided walks, etc.	CoCT: Tourism Development CoCT: Urban Conservation	Historical societies & associations

CAPE FLATS AND METRO SOUTH EAST

Issue	Key action	Lead agency	Partners
Capacity-building	Establish Community Tourism Forums where required, and assist poorly- coordinated forums and organisations to mature based on defined strategies and business plans	Branch: Tourism Development	
	Assist operators to address varying prices, product quality, service quality and reliability in order to ensure the quality of the visitor experience	Branch: Tourism Development Branch: Tourism Development	
	Establish regular information and capacity-building sessions for township operators		
Building identity	Identify and map of tourism routes (in association with community tourism forums and tour operators)	Branch: Tourism Development	
	Formalise routes with appropriate directional and tourism signage, and reinforcing through brochures and marketing material	Branch: Tourism Development Transport planning	

TYGERBERG AND OOSTENBERG

Issue	Key action	Lead agency	Partners
Building identity	*Linking and packaging heritage features* The Mayibuye Centre at UWC houses a unique and invaluable collection of material related to the anti-apartheid struggle but remains an under-utilised asset that should be a core component of the development of heritage tourism, themed along the liberation history, in Cape Town. A structured and pro-active approach with actions such as the identification of the key physical elements underpinning the development of the theme, exposing and 'formalising' places as attractions, and creating linkages through partnerships, marketing, promotional material, are some of the actions required to realise the opportunity for product development.	CoCT: Tourism Development CoCT: Urban Conservation	PAWC Tertiary institutions SAHRA

BLAAUWBERG

Issue	Key action	Lead agency	Partners

Building identity	Focus on the coast is on nature, outdoors and culture. Series of themed "Blaauwberg Meanders" linking Milnerton Lagoon, Rietvlei, Blaauwberg Conservation Area with rest stop areas, and "Cycle Blaauwberg" routes provide potential for the promotion of outdoor activity with a focus on the coast and wetlands, sport, leisure and cultural experiences. Some possibilities are: ⇒ A shipwreck route capitalising on surface and under-water resources. Milnerton Lighthouse is an ideal location for interpretive signage, directional map and orientation point. ⇒ The creation of a series of interpretive points along the coast at places where remains of archaeological and palaeontological sites exist. Linkages to the West Coast Fossil Park and Langebaan 'Eve's Footprint' are important. ⇒ A birdwatcher's route linking wetland, dune, beach and interior birdhides. ⇒ A Military History Meander linking Battle of Blaauwberg site, World War II structures on Blaauwberg Hill, etc. A series of thematic route brochures already exist. Formalisation of trails and paths by means of directional and interpretive signage; trail and path infrastructure; etc. is required.	CoCT: Tourism Development CoCT: Planning Cape Town Tourism CoCT: Tourism Development	
	Reactivate the community group involved in the preparation of the Mamre Tourism Development Strategy to track progress-to-date and revise based on market trends and current gaps in the metropole's product provision.	CoCT: Tourism Development	
	Tourism activities in the interior are currently limited due to lack of awareness of the product offering, distance from the existing tourism nodes in Blaauwberg and inadequate product development. However existing historic structures, heritage and the natural environment provide the opportunity to create attractions and activities that are educational, exciting and unique to Cape Town. The creation of activities and facilities complementing the coastal node will be important to leverage tourism development in the interior. The focus on the coast is on sun, sea, outdoor sport and fun – the interior's resource base is geared for outdoor adventure, ecotourism, cultural and 'country living' experiences. Several building blocks such as the Koeberg Information Centre, the Cultural Centre (conferencing and camping facility), Silwerstroomstrand seaside resort and Mamre Museum complex are already in place.	Branch: Tourism Development	
Public and open spaces	The potential of the Blaauwberg Conservation Area would be further reinforced if the CoCT focuses on implementation as conceptualised in the Development and Management Plan and subsequent work, in order to achieve the vision for the BCA, and realize the enormous tourism potential it offers. The need for financial resources to be committed to the project is also critical to optimize its potential, as is the need to undertake a detailed business planning exercise.	CoCT: Environmental Management and Tourism Development	
Economic infrastructure	Development of a strategically located 'farmer's market' to create retail outlets for local vegetable growers and crafters. Capitalising on an existing venue with an expansion of the product base and proactive promotion could be considered.	CoCT: Economic Development	

Appendix B

Canadian TAMS 2006 Outdoor Activity Segmentation

Activity Segment	Activities in Segment	
Golfing	Played During a Stay at a Golf Resort with Overnight Stay	Golf Tour Package to Play on Various Courses
	Played an Occasional Game While on a Trip	
Hunting	Hunting for Small Game	Hunting for Birds
	Hunting for Big Game	
Fishing	Fresh-Water Fishing	Salt-Water Fishing
	Ice Fishing	Trophy Fishing
Wildlife Viewing	Viewing Land Based Animals	Bird Watching
	Whale Watching & Other Marine Life	Visited National, Provincial / State Park
	Wildflowers / Flora Viewing	Viewing Northern Lights
Hiking, Climbing & Paddling	Mountain Climbing / Trekking	Fresh Water Kayaking / Canoeing
	Rock Climbing	Ocean Kayaking / Canoeing
	Hiking / Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
		White Water Rafting
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkeling in Sea / Ocean
	Sunbathing, Sitting on a Beach	Scuba Diving in Sea/Ocean
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Freshwater Scuba & Snorkeling	Scuba Diving in Lakes / Rivers	Snorkeling in Lakes / Rivers
Exercising & Jogging	Working Out in Fitness Centre	Jogging or Exercising Outdoors
Cycling	Overnight Touring Trip	Recreational - Same Day Excursion
	Mountain Biking	
Motorcycling	Overnight Touring Trip	Same Day Excursion
Horseback Riding	With an Overnight Stop	Same Day Excursion
Snowmobiling & ATVing	All Terrain Vehicle - Overnight Touring Trip	Snowmobiling As an Overnight Touring Trip
	All Terrain Vehicle - Same Day Excursion	Snowmobiling Day Use on Organized Trail
Downhill Skiing & Snowboarding	Snowboarding	Downhill Skiing
Cross-country Skiing & Snowshoeing	Cross-country Skiing	Cross-country or Back Country as an Overnight Touring Trip
	Snowshoeing	
Wilderness Activities	Wilderness Skills Courses	Dog Sledding
	Ice Climbing	
Skating	Ice Skating	In-Line / Rollerblading
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	
Team Sports	Ice Hockey	Curling
	Football	Basketball
	Baseball or Softball	Soccer
Sports & Games	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	

Canadian TAMS 2006 Culture and Entertainment Segmentation

Activity Segment	Activities in Segment	
Historical Sites, Museums & Art Galleries	Well-known Historic Sites or Buildings	Well-known Natural Wonders
	Other Historic Sites, Monuments and Buildings	Historical Replicas of Cities or Towns With Historic Re-Enactments
	Strolling Around a City to Observe Buildings and Architecture	Museum - Military / War Museums
	Museum - General History or Heritage Museums	Art Galleries
		Paleontological/Archaeological Sites
Shopping & Dining	Shop Or Browse - Bookstore or Music Store	Shop Or Browse – Antiques
	Shop Or Browse - Clothing, Shoes and Jewellery	Shop Or Browse - Gourmet Foods in Retail Stores
	Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	Shop Or Browse - Greenhouse or Garden Centre
	Dining - Restaurants Offering Local Ingredients and Recipes	High-End Restaurants with an International Reputation
	Went to Local Outdoor Cafes	Other High-End Restaurants
Aboriginal Cultural Experiences	Aboriginal Cuisine (Tasted or Sampled)	Aboriginal Arts and Crafts Shows
	Aboriginal Heritage Attractions (e.g., Museums, Interpretive Centres)	Aboriginal Cultural Experiences in a Remote or Rural Setting
	Aboriginal Festivals & Events (e.g., Powwows)	Aboriginal Outdoor Adventure and / or Sports
Fairs & Festivals	Farmers' Markets or Country Fairs	Firework Displays
	Carnivals	Ethnic Festivals
	Exhibition or Fairs	Food / Drink Festivals
Science & Technology Exhibits	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
Theme Parks & Exhibits	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Entertainment Farms (e.g., Corn Maze, Petting Zoo)
	Wax Museums	
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	Professional Soccer Games
Live Theatre	Live Theatre	Live Theatre with Dinner
	Theatre Festivals	
Literary & Film Festivals	Literary Festivals or Events	International Film Festivals
Tastings	Went to Wineries for Day Visits and Tasting	Cooking / Wine Tasting Courses
	Went to Breweries for Day Visits and Tasting	Visited Food Processing Plants (e.g., Cheese Factory)
Casinos	Went to a Casino	
Spas	Day Visit to a Health & Wellness Spas while on an Overnight Trip	
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National / Provincial Park
	Curatorial Tours	Archaeological Digs
Equestrian & Western Events	Equine (Horse) Competitions	Western Theme Events (e.g., Rodeos)
	Horse Races	

Agro-Tourism	Dining At A Farm	Harvesting and / or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	
National & International Sporting Events	Curling Bonspiel	National / International Sporting Events such as the Olympic Games
	Professional Figure Skating	
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related
Musical Concerts, Festivals & Attractions	Music Festivals	Musical Attractions
	Jazz Concert	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Rock & Roll/Popular Music Concert	Country & Western Music Concert
Comedy Festivals & Clubs	Comedy Festivals	Stand-up Comedy Clubs & Other Variety Shows

Appendix C

i South Peninsula Spatial Development Framework, 2001

ii Delegate comment, Responsible Tourism Conference site visit, August 2002

Appendix C