

LANGEBERG MUNICIPALITY



Tourism Strategy
28 April 2015

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ABBREVIATIONS

B&B	Bed and Breakfast
CWD	Cape Winelands District
GDPR	Gross Domestic Product Region
LED	Local Economic Development
IDP	Integrated Development Plan
LED	Local Economic Development
LEDP	Local Economic Development Partnership
LLM	Langeberg Local Municipality
LTA	Local Tourism Association
MICE	Meetings, Incentives, Conferences and Exhibits
MTB	Mountain Biking
NDP	National Development Plan
SAT	South African Tourism
PACA	Participatory Appraisal of Competitive Advantage
SANBI	South African National Biodiversity Institute
SWOT	Strengths, Weakness, Opportunities & Threats
TFDS	Total Foreign Direct Spend
VFR	Visiting friends and relatives
WC	Western Cape
WESGRO	Destination Marketing, Investment and Trade Promotion Agency

1 INTRODUCTION

1.1 PURPOSE OF THE PROJECT

Shannon Moffett Consulting has been appointed to develop a Tourism Strategy for the Langeberg Local Municipality (LLM) in the Western Cape (WC). The purpose of this plan is to direct tourism development in the area.

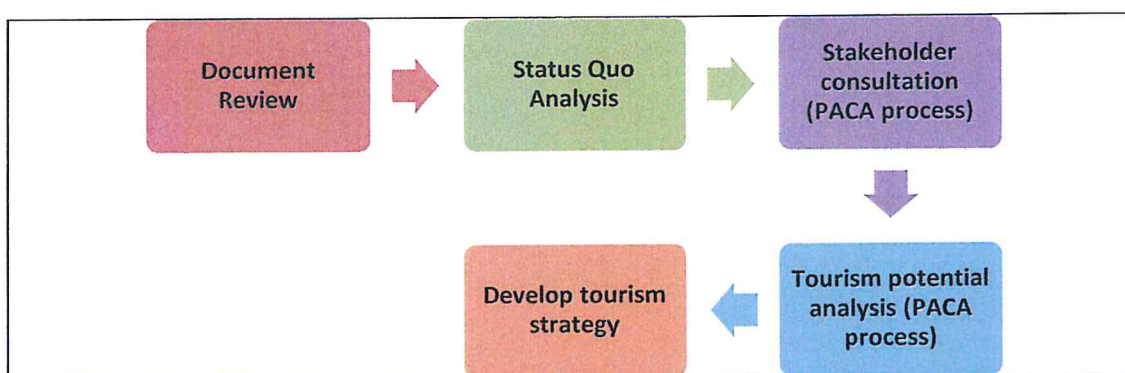
1.1.1 AIMS AND OBJECTIVES

The aim of the plan is to provide a tourism strategy that will:

- Guide public and private investment.
- Provide an institutional framework for tourism development in the municipality
- Highlight programmes and projects which can grow the tourism sector.
- Provide a sector based strategy based on researched target markets.
- Focus on the unique selling points of all the areas within the municipality
- Provide a co-ordinated approach to tourism development in Langeberg

1.2 METHODOLOGY

The diagram below illustrates the sequence of steps that was used by the consultant to complete the project and is summarised in the section following:



1.2.1 INFORMATION SOURCES

1.2.1.1 Desktop research

A desktop research process was undertaken to determine any documents from national, provincial, district or government levels that could provide insight into the broader context in which tourism in Langeberg could be developed, as well as understanding the current visitors to Langeberg, as well as the broader geographic areas.

1.2.1.2 Meetings

A meeting was held with the municipal official responsible for tourism development and marketing to get his input into the tourism sector within Langeberg, and its growth potential. A further meeting / workshop was held on the 6 December 2013 with representatives of the tourism associations in the LLM, and a representative from the Langeberg Municipality to discuss key focus areas and inputs into the tourism strategy.

1.2.1.3 Product owner survey

An internet based, 'Survey Monkey' survey was conducted with the tourism product owners within Langeberg. An email was sent to all tourism products on the database provided by the tourism associations within Langeberg. A total of 447 products were contacted, explaining the survey and providing a link to the internet survey. Product owners were given 3 weeks to complete the survey. A total of 99 product owners started with survey, a response rate of 22%. The majority of owners completing the survey were accommodation owners (58.8%), with 35.1% owners of tourism activities or attractions, and 6.2% respondents from a tourism association or route. Only 62 product owners completed the whole survey (62,6%) with some leaving out questions that they found problematic. The data was analysed, and added to the status quo report. Some input was received regarding recommendations on taking the tourism industry in Langeberg, and this information was added to the strategy section of this report. A copy of the survey can be found at Appendix A.

1.2.1.4 Tourism association questionnaire

A questionnaire was sent to each of the three functional tourism associations in Langeberg, as well as to the Robertson wine valley to get an understanding of the institutional functioning of these organisations, and to get the input of these associations into the steps needed in Langeberg to grow the tourism economy. The responses to these questionnaires were analysed and included in the status quo assessment, and the tourism strategy. A copy of the questionnaire can be found at Appendix B.

1.2.1.5 PACA process

The Western Cape government provided facilitators to assist with a Participatory Appraisal of Competitive Advantage (PACA) in tourism with stakeholders within the municipality. This consisted of 5 days of workshops in all the towns in the LLM. The PACA workshops were divided into broad tourism sectors, such as Health and Wellness, Businesses and Services, Outdoor and Adventure etc. Through the workshops, a number of quick wins were identified, which, in the final workshop, champions were identified who would drive each quick win. The key findings as well as the some of the quick wins and more long term projects were included in this tourism strategy.

1.3 OUTLINE OF THE TOURISM STRATEGY

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This tourism strategy begins with a discussion on the framework on context for the strategy, to ensure alignment with other initiatives, policies, programs locally, provincially and nationally. The current status of the tourism sector in the LLM, looking at supply and demand factors, the business of tourism, as well as the economic impact of tourism locally is examined in the next section. A Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis is then used to analyse the tourism industry in the LLM, which provides a platform for the analysis of the strategic direction, vision and tourism strategy which follows. An Action plan is provided separately to this document, in a working document excel format, but copies to this strategy.

2 FRAMEWORK & CONTEXT FOR A TOURISM STRATEGY IN LANGEBERG

The purpose of this section is to develop the framework in which the Langeberg Tourism Strategy needs to be developed. Specifically, the tourism strategy for Langeberg needs to align, where possible, with relevant policies and programmes on national, provincial and local government level. This section therefore sets out these policies and programmes to frame the development of this tourism strategy.

2.1 NATIONAL LEGISLATIVE, POLICY AND PROGRAMME FRAMEWORK

2.1.1 CONSTITUTION OF SOUTH AFRICA, ACT 108 OF 1996

According to the Constitution of South Africa, Act 108 of 1996, municipalities have a responsibility to exercise the developmental mandate across all functions delivered at local level – including the development and marketing of the tourism sector; “Local tourism” is defined as a function of municipalities within the Constitution. Sections 152 and 153 of the constitution have particular relevance to the involvement of municipalities in tourism and their relationship with tourism organisations. Municipalities are mandated through the constitution to promote the social and economic development of their communities, and their involvement in tourism must be related to this mandate.

The aim of developmental tourism is to increase local incomes and to create job opportunities through enhancing the community’s ability to create enterprises. In particular, the constitution refers to developmental tourism being the process through which:

“Partners from the public, business, labour and civic sectors work together to identify, utilise and harness location-specific resource to grow and transform the economy in specific local areas through implementing programmes and projects that build on and showcase opportunities and /or address economic empowerment constraints” (Constitution of SA, Act 108:1996).

The Constitution of South Africa identifies the following local tourism related issues where municipalities have to perform:

- Municipal airports
- Municipal public transport
- Pontoons, ferries etc.

- Trading regulations.

Schedule 5 Part B sets out the functional areas of municipal competence in terms of sections 155(6) and 155 (7):

- Beaches and amusement facilities
- Control of undertakings that sell liquor to the public
- Local sport facilities
- Municipal parks and recreation.

2.1.2 WHITE PAPER ON DEVELOPMENT & PROMOTION OF TOURISM IN SOUTH AFRICA (1996)

The most important of the DEAT policies regarding tourism are laid out in the DEAT's White Paper on the Development and Promotion of Tourism (May 1996). This legislative act sets out the national policy framework for tourism as summarised below;

Key guiding principles for tourism:

According to the White Paper (1996) the following is a list of some of the key guiding principles for tourism:

- tourism will be private sector driven
- effective community involvement will form the basis of tourism growth
- tourism development will be underpinned by sustainable environmental practices
- tourism development is dependent on and the establishment of cooperation and close partnerships among key stakeholders
- tourism will be used as a development tool for the empowerment of previously neglected communities and should particularly focus on the empowerment of women in such communities
- tourism development will take place in the context of close cooperation with other states within Southern Africa
- tourism development will support the economic, social and environmental goals and policies of the government.

The White Paper (1996) has specific reference to local communities, an important directive that will inform the Langeberg Tourism Strategy:

"To succeed, any tourism development policy of South Africa must, as a priority, seek the meaningful involvement of the previously neglected communities, not only in the supply of their labour services, but also in entrepreneurial activities."

Key objectives for tourism

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The White Paper (1996) sets out an extensive list of key objectives of tourism in the country. Again, it is not within the parameters of this report to highlight all of these objectives. Therefore what follows is a list of some of the key objectives that are highly relevant to the development of the Langeberg Tourism Strategy. They are as follows;

- To generate economic growth by aggressive development, marketing and promotion of tourism;
- To establish tourism as a priority sector
- To create sustainable employment
- To optimise opportunities for SMMEs
- To utilise tourism to aid development in rural areas
- To promote domestic tourism amongst all South Africans
- To create a conducive tourism investment climate
- To encourage linkages between tourism and other industries to curb leakages and stimulate the multiplier effect
- To provide tourism capacity building programmes, especially aimed at previously neglected groups
- To use tourism as a catalyst for human development
- To encourage the active participation of all in tourism development, particularly at the local level
- To empower local communities through community tourism initiatives
- To make tourism a leading South African industry in responsible environmental practices
- To ensure environmental management principles for all tourism projects
- To encourage the conservation and sustainable use of tourism resources.

Roles and Responsibilities of Local Government

According to the Tourism White Paper, the following are some of the roles and responsibilities of local government with regards to tourism development;

- “Responsible land-use planning, urban and rural development;
- Control over land-use and land allocation;
- Provision and maintenance of tourist services, sites and attractions, e.g. camping and caravan sites, recreational facilities (parks, historical buildings, sports facilities, theatres, museums, etc.) and public services;
- Provision of road signs in accordance with nationally established guidelines;
- Market and promote specific local attractions and disseminate information in this regard;
- Control public health and safety;
- Facilitate the participation of local communities in the tourism industry;
- Own and maintain certain plant, e.g. ports and airports;
- Provide adequate parking, also for coaches;
- Facilitate the establishment of appropriate public transportation services, e.g. taxi services;

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- License establishments in accordance with national framework;
- Promote and financially support the establishment of local publicity associations /community tourism and marketing organisations to facilitate, market, coordinate and administer tourism initiatives”.

An important qualifier within the Tourism White Paper relevant for this study is as follows: “local government should not provide services that can be provided by the private sector. The implication of this is that government roles should be those of;

- Facilitator
- Stimulator
- Organizer”

Roles and responsibilities of the private sector

According to White Paper (1996) the following are some of the key roles and responsibilities of the private sector with regard to tourism;

- Collaborate with the government in planning, promoting and marketing tourism;
- Involve local communities and previously neglected groups in the tourism industry through partnerships; and
- Represent the interests of private business on the boards of national and provincial tourism bodies (also local).

Roles and responsibilities of communities

The Tourism White Paper also allocated tourism development roles to communities as follows;

- Organize themselves to play a more effective role in the tourism industry and interact with government and role players;
- Seek partnership opportunities with the established tourism private sector;
- Participate in decision-making with respect to major tourism developments planned or proposed for the area;
- Have a representative voice in tourism structures; and
- The notion of partnerships between government, the tourism industry and communities is a consistent theme of the White Paper.

2.1.3 DOMESTIC TOURISM GROWTH STRATEGY 2012-2020

The purpose of this strategy is to stimulate and accelerate growth in domestic tourism. The objectives of this strategy, and the specific actions to do so, are as follows;

- Increase domestic tourism expenditure (revenue)
 - Innovation of operations, attractions and offerings

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- Maximize the use of existing and introduce new products
- Increase in business travel volume
- Entrenching a culture of travel
- Increase domestic tourism volume;
 - Differentiated packaging of affordable tourism products
 - Review and enhance conversion mechanisms
- Enhance measures and efforts aimed at addressing seasonality and equitable geographical spread;
 - Audit of products across the country to ascertain availability for all the priority segments
 - Maximize use (all year round) of existing tourism assets/ facilities
 - Differentiated marketing
- Enhance the level of the culture of tourism/travel among South Africans.
 - Develop and implement tourism awareness-education programme/campaigns
 - Enhance training of tourism product owners, employees and neighbouring communities

2.1.4 NATIONAL TOURISM STRATEGY

A National Tourism Sector Strategy (NTSS), has been developed by the National Department of Tourism to direct tourism in South Africa. A summary of the key points in this strategy are provided below;

Vision: To be a top 20 tourism destinations in the world by 2020

Mission: To grow a sustainable tourism economy in South Africa, with domestic, regional and international components, based on innovation, service excellence, meaningful participation and partnerships

Theme 1: Tourism growth and the economy

1. To grow the tourism sector's absolute contribution to the economy
2. To provide excellent people development and decent work within the tourism sector
3. To increase domestic tourism's contribution to the tourism economy
4. To contribute to the regional tourism economy

Theme 2: Visitor experience and the brand

5. To deliver a world-class visitor experience
6. To entrench a tourism culture among South Africans
7. To position South Africa as a globally recognised tourism destination brand

Theme 3: Sustainability and good governance

8. To achieve transformation within the tourism sector
9. To address the issue of geographic, seasonal and rural spread
10. To promote 'responsible tourism' practices within the sector
11. To unlock tourism economic development at a provincial and local government level

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Actions and sub actions of this plan, that have potential implication for the development of a tourism strategy in Langeberg are summarised below;

- “Develop a database of all tourism assets, and explore mechanisms and ways of promoting the registration of tourism businesses in South Africa to gather information on supply in the industry
- Implement electronic and other means of determining passenger movements in partnership with other stakeholders
- Develop a national web-based and/or mobile/cell-based system for visitors to complete visitor satisfaction forms at various locations (also see “Quality assurance”)
- Formalise structures for collaboration and interaction between the public and private sector at national and provincial government level
- Encourage the development of private-sector communication forums/associations or mechanisms that facilitate communication between the different sub-sectors of the tourism industry
- Review the current destination marketing situation in South Africa at provincial, city, district and local levels, and align the destination marketing efforts of the various spheres to ensure that destinations within South Africa do not compete, but complement one another in the international arena
- Market domestic leisure tourism to all major local markets
- Encourage and support low-income South Africans, who take limited or no holidays, to travel domestically for leisure purposes
- Engage SALGA, National Treasury and COGTA to ensure that a comprehensive framework is developed for tourism activity at local level, including ensuring that relevant local municipalities allocate a budget for tourism
- Roll out tourism awareness and training programmes among all local government councillors and management members in the relevant municipalities
- Within the municipal tourism framework, ensure that tourism is an important criterion in infrastructure development planning, particularly in rural and peri-urban areas
 - Identify key infrastructure projects in relevant municipalities that could assist in the development of tourism, and liaise with relevant responsible agencies to prioritise these projects (e.g. current study on harbours)
 - Develop mechanisms to encourage membership of local tourism organisations
- Create a people development plan, including training, effectively to produce the required sector skills at all levels, but particularly management and entrepreneurship skills
- Develop and implement a tourism awareness campaign throughout South Africa
- Develop programmes to attract more black entrepreneurs to enter the industry and own and operate SMMEs throughout the sector, and provide support for such entrepreneurs
- Improve local government’s capacity for, and understanding of, tourism, specifically community-based tourism issues and opportunities, to enable them to provide realistic assistance to communities to maximise potential tourism opportunities Build awareness and understanding of tourism among communities, particularly rural communities, to eliminate unrealistic expectations Identify destinations and areas where communities could become beneficiaries of tourism projects, and identify and support appropriate product development

- Contribute to an efficient, intermodal transport system in South Africa that will allow domestic and international tourists to move about easily – to, from and within destinations” (South African Tourism)

Implications for tourism strategy: Where possible, and where relevant, actions as part of the tourism strategy should align with those on national government level.

2.2 PROVINCIAL LEGISLATIVE, POLICY AND PROGRAMME FRAMEWORK

The tourist strategy for the Western Cape has expired and is in the process of being reviewed for the next 5 year cycle. This strategy is expected to be released in draft format in the middle of March 2014, and is expected to significantly change many of the tourism programmes etc. within the province. The presentation and review of this draft will involve significant engagement with local, district etc. tourism stakeholders.

Implications for tourism strategy: Tourism stakeholders within the LLM should engage with the provincial strategy process to ensure that constraints and opportunities in the tourism sector in the LLM are addressed. The LLM tourism strategy should be reviewed following the finalisation of the Western Cape strategy, to take advantage of opportunities and programmes within this strategy.

2.3 DISTRICT LEGISLATIVE, POLICY AND PROGRAMME FRAMEWORK

2.3.1 CAPE WINELANDS REGIONAL LOCAL ECONOMIC DEVELOPMENT STRATEGY

In 2012, the CWD completed their Regional Local Economic Development Strategy (RLED). There are a number of tourism interventions within this strategy, which are summarised here.

2.3.1.1 RLED status quo assessment of tourism in the district

The RLED notes that both Stellenbosch and Paarl are very popular for day visitors, making use of the wine routes connecting these areas. The plan estimates that 50% of visitors to the area are there for the wine route¹. The strategy goes on to estimate that;

“The three towns of Paarl, Franschhoek and Stellenbosch receive approximately 50% of all visitors to the CWDM. These visitors are predominantly interested in a one day wine experience. The remaining 50% of visitors are divided between the District’s thirteen other towns. The well-known Route 62 draws visitors into Worcester, Robertson, Ashton and Montagu” (Urban Econ, 2012).

¹ It is not clear what statistics were used to determine this.

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In particular, the strategy notes that “In the CWDM there are a number of established as well as developing tourism routes which provides countless opportunities for the creative entrepreneur to mix and match marketable products and destinations.” The main features of the districts tourism offerings are presented as;

- Food and wine
- Adventure
- Eco-tourism
- Business and events
- Health and wellness
- Culture and heritage
- Romantic travel

The strategy notes the constraints and opportunities within diversification of the tourism sector in the district, saying that tourists are eager to experience the cultural heritage of ‘black areas’ in the district. Opportunities for black tourism entrepreneurs include;

- Eateries
- Visits to traditional healers
- Visits icons within the community (i.e. youth programmes, environmental projects, etc.)
- Walking tours
- Township entertainment areas
- Exploring rural lifestyles

Constraints listed in the strategy to growing tourism within the district are listed as follows;

- Lack of information on client needs and preferences
- Seasonal nature of tourism within the district
- Lack of alignment of strategies between neighbouring municipalities
- Budget constraints of tourism desks

The strategy highlights the following projects or tourism opportunities that have been identified by the LLM;

- Development of the Breede River into a resort
- Arts and Crafts (PPP with Nedbank)

Relevant district tourism projects or opportunities are identified as;

- Cape Winelands Biosphere Reserve
- Destination Marketing

2.3.1.2 Tourism relevant projects within the RLED

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The key projects with specific relevance to tourism within the CWD RLEDs are as follows;

- Unlock investment potential within the Local Municipalities;
 - Craft products
 - Development of theme resorts
 - Further accommodation facilities
 - Health tourism facilities
 - Recreation and sports related facilities
 - Upgrade of tourism infrastructure
 - Specialised farm and township tours
 - Agri-tourism and eco-tourism
 - Summer tourism activities
- Provide calendar of events of all social and cultural activities within the district
- Unlock potential niche market developments;
 - (as per the tourism investment potential listed above)
- Identify and support cross border projects
 - Developing a tourism route from Stellenbosch to Paarl
- Bulk infrastructure development to support development
 - (as per the tourism investment potential listed above)

2.3.2 CAPE WINELANDS DISTRICT WEBSITE

The Cape Winelands District website, www.capewinelands.gov.za lists a number of tourism projects. Those with relevance to the tourism sector within the LLM are listed below;

Project	Project details
NHTV Exchange Programme	Students from NHTV Brede University in the Netherlands have been engaged in tourism research in the district. As part of the exchange programme, South African students (presumably from the district), also engage in 3 months of study in the Netherlands.
Freedom route	This project aims to develop a route linking significant heritage sites related to freedom. The route is expected to result in community and SMME development. Two studies have been completed in this regard; the 'Aunties study' and 'Farm Workers History'. Another study looking at 'Spiritual Freedom is planned'. The route will be marketed through maps and associated activities. (It is not clear if any of these routes pass through the LLM).
Art and Crafts Route	The purpose of this project is to ensure craft enterprises from Previously Disadvantaged communities can derive benefit from the tourism sector. These enterprises are assisted with product development, skills development, and market access as well as branding and marketing assistance. 20 craft enterprises were selected for this project.
Schools tourism awareness project	This project involves awareness of tourism as a career opportunity within schools and involves programmes exposing learners to various aspects of the tourism industry. Currently 11,000 learners are involved in this program.
Cape Winelands Home	This project is focussed on facilitating tourists staying within the homes of local

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Stays	families across the district, thereby getting first-hand experience of the communities in which the homes exist. The project has benefitted 30 women so far, who have had tourism awareness training, entrepreneurial training etc. This programme is pushed on a provincial level.
Tourism Business Training	This programme is a partnership with the Department of Economic Development, Western Cape and aims to support emerging tourism entrepreneurs by building their business capacity. The district has 2 tourism help desk agents who recruit and assist entrepreneurs with funding and training.
Gateway Information Centres	The purpose of these centres is for destination marketing, product development through maximising regional exposure and marketing the WC as a globally competitive tourist destination. It is not clear what the current status of these centres is and if any are envisaged for the LLM.
Tourism Road Signage	Route 62 has been identified by the WC government as a pilot project for tourism signage, considered as an important information network to aid SMME development and communities. According to the Tourism Road Signage Framework, Route 62 is considered a Super Tourist Route. District interventions as part of this programme include marketing, road signage, and the development of Arts and Crafts along Route 62. The upgrading of the lay-by between Worcester and Robertson, as well as a tourist information sign and kiosk.

Source:

<http://www.capewinelands.gov.za/departments/RegionalDevelopmentPlanning/SitePages/Tourism%20Projects.aspx>

Implications for tourism strategy: Where possible, the tourism strategy should seek to create alignment with the tourism direction, policies and programmes pursued by the district to grow the tourism sector. Furthermore, it is important that alignment takes place between all the municipalities within the district, that that this coordination should be done by the district. Institutional structures should be pursued to facilitate this.

2.4 LOCAL POLICY AND PROGRAMME FRAMEWORK

2.4.1 DRAFT LANGEBERG LED STRATEGY (2013)

A number of interventions targeted at growing the tourism industry in Langeberg are within the recently completed LED strategy (2013). These are summarised below. These need to be included and where possible, further unpacked in this tourism Strategy.

“Programme 4.2: Further develop the tourism sector within Langeberg Municipality

The tourism sector is one of the key sectors within Langeberg, through its contribution to the economy, but also its links to other sectors, and the role it has in marketing the area as a whole. A number of constraints currently exist with the sector, and this has hindered to some degree its potential. The focus of projects selected under this programme is around marketing the municipality as a whole, rather than

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as individual towns, the transformation of the tourism sector, and the provision of tourism infrastructure to facilitate sector growth.”

Specifically, the projects (and related actions) under this programme are within the LED strategy are as follows;

- Diversification of the tourism sector;

Look at tourism opportunities beyond traditional areas, markets
Marketing of opportunities
Facilitate training on what is tourism, how to create tourism business
Assist with marketing of new tourism ventures
Feasibility of medical tourism, sports tourism
Develop mechanisms to assist in transformation of the tourism sector

- Collaborative marketing of the key towns and products within Langeberg

Look at opportunities to brand export goods from LLM
Conduct product audit
Define unique qualities of Langeberg
Agree on marketing strategy of municipality as a whole
Develop and distribute marketing material
Attend tourism Indaba, promotional opportunities

- Create tourism infrastructure

Develop signage to key tourism products across LLM
Develop tourism information offices in each town

Source: (Shannon Moffett Consulting, 2013)

2.4.2 LANGEBERG LOCAL ECONOMIC DEVELOPMENT PARTNERSHIP

The Langeberg Municipality is in the process of setting up a Local Economic Development Partnership (LEDP). As of April 20014, the council has decided to proceed with the establishment of this partnership. As tourism is one of the important drivers of the local economy, the planned partnership is summarised here. The LEDP is expected to be representative of all key stakeholders that contribute to economic growth and is expected to set up administrative capacity in compliance with Section 67 of the Municipal Finance Management Act². Some of the key Terms of Reference of the LEDP are;

- Promote economic growth and improve business and investment climate
- Provide a platform for business to engage with the LLM
- Advise on LED matters to council

² This section deals with the framework for funding to bodies, parties etc., external to the municipality

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- Develop business retention and expansion strategies
- Promote skills development and marketing of the region
- Collaborate with similar, relevant institutions and departments etc.
- Solicit funding to meet objectives

In terms of structure of the LEDP, the proposed structure is as follows;

- Plenary body:
 - Represented by all sectors, 3 council representatives, the Municipal Manager and relevant directors
 - Chairperson from the private sector
 - Quarterly meetings for policy development and approve programs of boards
- Executive body:
 - (also referred to as the working committee)
 - Include all LED departments
 - Considered as the implementation arm of the LEDP
 - Consist of chairperson of the plenary, and four other members, including one councillor
 - Administrative support to be provided by Economic Development Officer

The LED is expected to run parallel to the municipality, and the board, chaired by a representative from the private sector, is expected to be autonomous, but subject to the policies and principles of local government. The LEDP is expected to set up their own initiatives with funding provided by the LLM.³

2.4.3 LANGEBERG TOURISM MARKETING STRATEGY

A marketing strategy for the Langeberg tourism sector was completed in 2012. The key findings and recommendations from this strategy, where relevant, should be used in this Tourism Strategy, which will include a marketing plan. The purpose of this section is therefore to summarise this marketing strategy.

The purpose of this strategy was to;

“...give Langeberg region (as a tourism attraction) a Brand Personality and Marketing angles that would maximize the visitors, tourism activity and tourism expenditure in the 5 towns of the Langeberg.”

The strategy focusses largely on creating a brand identity of the 5 major towns within the municipality but does include an examination of the brand identity of the municipality as a whole.

Specific suggestions around marketing within the strategy are as follows;

³ Source: LEDP Terms of Reference, by email

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- Make use of the Montagu Mountain Reserve within the 'complete tourism marketing plan for Langeberg'⁴
- Make use of 'earth issues' to attract the overseas market focussing on; "sustainability, eco-friendly experiences, authentic and "real" experiences, down to earth, unplugged, organic, Recycling / 'Precycling' crafts and art and visiting a "disappearing world"

In terms of the target market for the municipality, the strategy breaks down the different market segments and what they might look for in Langeberg. It is unclear if any tourism statistics and research was undertaken to come to these conclusions. The target markets identified here are given in terms of lifestyle segments, as follows;

- The authentic experienter
- The cultural explorer
- The 'bourgeois bohemian'

In terms of Brand Identity, the strategy discusses Langeberg as including 5 'essensual' towns – meaning "the experience of the essence of life through all your senses". The following table summarises the reimagined brand identity for the towns within Langeberg, as presented in the strategy;

Town	Brand essence	Defining image
Robertson	The largest town in the Langeberg stooped in history, sensuously present and thriving on modern vibrancy, introducing you to an "essensual" lifestyle and an Experience of Sensory awareness and abundant Natural surroundings. Slowing you down enough to smell the roses and taste the fruit of the vine.	Roses and vine (plants)
McGregor	McGregor is a unique, alternative, eccentric and therapeutic village at the end of the road in the Langeberg away from the crowds where you can truly unwind, step back in time and just relax. THE VILLAGE THAT TIME FORGOT!	The healing sun
Ashton	Historical Platform in the heart of the LANGEBERG where "sustainability" is key – A Gateway to the "Essensual" towns and lifestyle experiences that nature has to offer in it's purest form. Come share in the stories and Discover the access to sensory experiences of your choice	The platform / train
Montagu	Wholesome Eco-, Adventure- and Wellness destination in the Langeberg that appeals to all the senses of the tourist – which makes them linger longer...Presenting the tourist with a lifestyle they envy. EXPECT THE UNEXPECTED!	The mountain
Bonnivale	An inviting destination along a sensual ever flowing Breede river that welcome you to the Valley of Cheese and wine - surrounding you with warmth and unpretentious hospitality. FEEL THE EMBRACE OF MOTHER NATURE AND HER PEOPLE	Water / Breede River

⁴ It is not clear if this is meant as a product development component, or making use of the mountain reserve to better market the municipality as a whole.

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Langeberg	The Langeberg region represents a lifestyle and quality of life the visitor envy. It is all about slowing down enough to experience the essence of life through all your senses. It is where Mother Nature lives!!!!	"You can make a living or design a life"
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Source: (Mareletta van Zyl-Wohlfarter, 2011)

The strategy goes on to highlight the key elements within Langeberg which will be attractive to tourists;

- Natural elements
 - The mountains
 - The changing seasons
 - The abundance of water, in particular, the Breede River
 - The plant life
 - Agricultural variety
- 'Food at its roots'
- The people
- Diverse cultures
- Safety

Based on the above, the key recommendations for marketing the Langeberg LM are as follows;

- -Incorporate the above Marketing angles and descriptors in all Tourism marketing material.
- -Create a Langeberg Municipality – "Langeberg as a Region" ad – with this creative ideas and use repeatedly in publications that would support "brand building" for the region and the municipality.
- -Take these "creative" solutions through all the Focus points of the strategy.
- -Explore possible "visual" touchpoints – of defining images for each town and the Langeberg Municipality Corporate Identity
- -Assist the Tourism office of each of these towns to adopt and implement the Brand Identity and utilize in their marketing plan
- -Shared brand building for both the town and the Langeberg Municipality
- -Shared media plans and marketing opportunities
- This might require individual "brand identity-implementation" sessions

Tourism opportunities based on this branding exercise were identified as follows;

- Health and wellness tourism
- Outdoor and adventure destination
- Preserving and offering an Authentic Heritage and History
- Agri-tourism
- Engaging visitors through our people and experiences

While this is a marketing strategy, some suggestions were made around product development in this strategy, as follows;

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- Look at development of the Rooiberg Breede River Conservancy into a larger Langeberg Conservancy, with a focus on eco-tourism.

In terms of institutional structuring of marketing of the tourism sector within Langeberg, the strategy makes recommendations around the appointment of a 'Tourism marketing coordinator / manager' within the municipality, whose roles would be around creating links between the towns and key stakeholders, collecting visitor data, trend analysis, adjustment of the tourism marketing strategy etc. It is not clear if this appointment would be within the private or public sector. The strategy goes on to discuss the importance of having a tourism information office in each town, and discusses the importance of a good relationship between these offices and the municipality, and between themselves. Furthermore, it discusses the importance of the municipality funding these offices so that they can continue to provide services to the tourists and the sector as a whole.

The strategy incorporates a number of tasks over various time periods. Where relevant, these will be included in the overall tourism strategy for the municipality.

3 LANGEBERG: A STATUS QUO ANALYSIS OF TOURISM IN LANGEBERG

3.1 INTRODUCING THE STATUS QUO ANALYSIS

A status quo analysis is an important tool in the development of any strategy or sector plan. It is designed to provide an overview or snapshot of the current situation of an area. A strategy or plan is essentially designed to take a place from that current situation to where the area can potentially be, in this case in terms of tourism development. In order to provide a snapshot of an area's tourism sector the following information is required:

- An assessment of **tourism demand** within the area, as well as on national and provincial level. Important information here is who is coming to the area, how they are arriving, where they come from, activities that they engage in, how they came to hear about the area, etc.
- An assessment is also required of the gaps between the demand that tourists have, and the type of products that are available to meet that demand. Gaps that are evident provide direction on interventions that can be made to fill such gaps.
- An understanding of the **current supply** of all tourism products in an area, and what kind of products they are
- An understanding of all hard infrastructure that tourists use to get to the Langeberg Municipality, and once they are there, around the municipality
- An understanding of tourism skill levels within the municipality
- An understanding of how the area's tourism products are marketed
- Information and an understanding of what kind of enabling environment exists in the Langeberg Municipality. That is, what kind of institutions exist that assist with tourism, the departments and individuals responsible for tourism development within the local municipality, any interventions to attract tourism investors to the area, entities in existence to promote development in the area, and

tourism forums or the like for tourism development. Furthermore, it is important to have an understanding of any tourism associations in place to promote tourism development within the Langeberg Municipality.

- An understanding of the strengths, weaknesses, opportunities and threats within the local tourism market so that the tourism strategy can address, thereby growing the local tourism sector.

3.2 TOURISM DEMAND

The **demand side** of tourism comprises those needs and motivations that drive individuals to become tourists. These needs and motivations are shared by other people and this becomes the basis for defining tourist segments and markets and these tourist segments ultimately drive the movements of tourists from one country and region to the next. Demand issues are around who comes to the area, why, what they do when in the area, how long they stay, where these tourists come from etc.

In order to have an insight into the understanding of the demand for tourism in South Africa particularly in the Langeberg Local Municipality, it is important to examine the current trends of the broader tourism industry. In this section the tourism market in South Africa, the Western Cape, the Cape Winelands District and the Langeberg Municipality is analysed. Both the foreign and domestic tourism markets have been analysed.

3.2.1 SOUTH AFRICAN TOURISM DEMAND

Tourism on the national government level includes both international tourism, and domestic tourism. It is necessary to understand both who the tourists are who are coming to South Africa, why they are coming, how long they stay etc.

3.2.1.1 Foreign tourism

3.2.1.1.1 Broad foreign tourism statistics

According to the 2011 Annual Tourism Report, foreign tourist arrivals to South Africa increased in 2011 by 3.3% over the previous year, to 8,339,354 tourists, an additional 265,802 tourist arrivals. However, overseas tourist arrivals decreased by 1.8%. These tourists however spent less than they had in the previous year. This can be attributed to a lower spend per day, and fewer days spent in the country. The following are the key international tourist statistics for South Africa in 2011;

Foreign tourists, 2011	
Tourist arrivals	8,339,354 (increase 3.3%)
Total foreign direct spend (excluding capital expenditure)	R74 Billion
Average spend per foreign tourist per day (excluding capital expenditure)	Land markets – R1,640
	Air markets – R630
Average length of stay	Land markets – 4.9 nights

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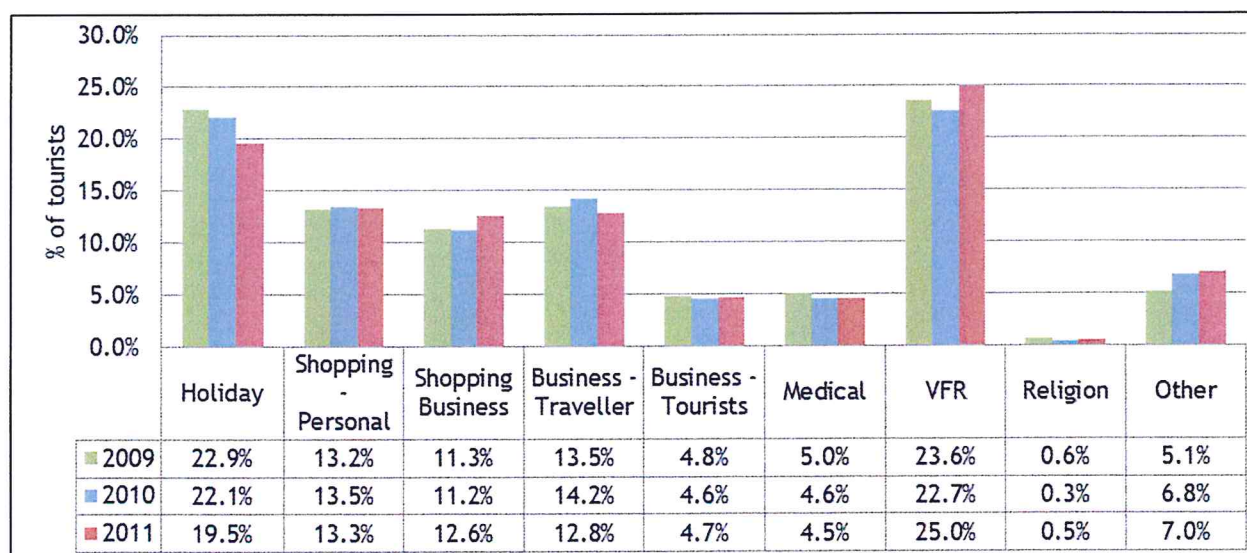
	Air markets – 17.6 nights
Average number of provinces visited	Land markets – 1.1
	Air markets – 1.6
Top 5 source markets (all)	Zimbabwe, Lesotho, Mozambique, Swaziland, Botswana.
Top 5 African air markets	Nigeria, Angola, DRC, Kenya, Tanzania
Top 5 overseas markets	UK, USA, Germany, Netherlands, France

Source: (South African Tourism, 2011)

3.2.1.1.2 Purpose of travel

The purpose of travel is an important indicator for why tourists are coming to a particular place. In particular, this can be used to determine what competitive advantage the Langeberg has and what tourist profile can be attracted to come to the area and for what purposes. The following table shows that holiday is no longer the primary purpose of visit for foreign tourists, with Visiting Friends and Relatives being the most common purpose of travel at 25%. This is followed by holiday at 19.5%. This is altered when the market is segmented according to geographical portfolio; The majority of holiday visitors come from Europe (44%), followed by the Americas (43.7%) and Asia and Australia (30%). The VRF market is largely equally spread across all geographic regions, with Business Travelers coming from Asia and Australia and Africa by air.

Figure 1: Purpose of visit for all foreign tourists



Source: (South African Tourism, 2011)

3.2.1.1.3 Activities undertaken by foreign tourists

The type of activities that foreign tourists engage in is largely influenced by their purpose of visit. The following table shows the activities by purpose of visit of foreign tourist in 2011;

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Figure 2: Activities undertaken by foreign tourists by purpose of visit

Activities by purpose of visit - 2011									
	Holiday	Shopping - Personal	Shopping - Business	Business traveller	Business tourist	Medical	VFR	Religion	Other
Shopping	97.4%	99.9%	97.8%	89.7%	92.0%	94.2%	98.1%	97.3%	96.3%
Nightlife	93.4%	51.7%	33.7%	76.7%	60.2%	25.9%	65.3%	42.9%	69.5%
Theme parks	20.2%	1.8%	1.5%	6.6%	3.6%	0.6%	5.9%	2.7%	12.9%
Trading	1.7%	6.2%	38.2%	5.4%	5.1%	3.7%	2.2%	2.5%	1.2%
Visited a Casino	14.1%	2.6%	2.6%	8.0%	5.0%	1.5%	6.8%	0.8%	4.1%
Sporting competed	1.6%			1.5%			0.5%	55.0%	2.8%
Sporting attended	2.7%	0.7%		4.3%	0.9%		2.7%	6.3%	4.0%
Business	1.9%	1.6%	1.6%	79.7%	69.0%		0.9%	3.4%	5.5%
Cultural, historical and heritage	43.6%	4.9%	0.9%	15.9%	16.1%	1.8%	21.3%	6.4%	35.7%
Wildlife	54.6%	2.1%	0.4%	14.1%	8.8%		11.7%	8.3%	21.4%
Visiting natural attractions	61.0%	2.8%	1.2%	22.6%	16.1%	1.6%	24.4%	13.1%	31.0%
Beach	44.8%	7.8%	4.0%	14.4%	9.6%	0.6%	13.9%	12.3%	27.1%
Social	33.1%	30.4%	16.5%	17.3%	18.6%	32.8%	89.2%	37.5%	40.0%
Medical	2.5%	1.1%		0.8%		88.4%	1.8%		1.1%
Health	1.1%			0.6%		9.1%			

Source: (South African Tourism, 2011)

It is clear that holiday tourists, the expected primary market for tourism in Langeberg, are different to those of the VFR or business market segment.

Implications for tourism strategy: Once the primary tourism purpose of visit for Langeberg has been identified, tourism product development and marketing needs to be tailored to meet the type of activities these tourists seek while on their trips.

3.2.1.2 Domestic tourism

A total of 13.9 million South Africans undertook a domestic trip in 2011, and increase of 3% from 2010. Key indicators for the South African domestic tourism market in 2011 are provided below.

- Total direct domestic spend – R20.3 billion (down 6% from 2010)
- Average spend per domestic trip – R780
- Average nights per domestic trip – 4.4 nights
- The primary purpose for a domestic trip is VFR with 72.6% of domestic tourist's primary purpose of visit was to visit friends or family. This is followed by holiday with only 15% during 2011.
- 40% of domestic tourists in the Western Cape list holiday as their primary purpose of visit, with 49% as VFR.
- Gauteng and KZN were the main source markets for domestic tourism in 2011, with 59% of all domestic trips taken in 2011. The Western Cape ranks third in terms of being a source market for domestic tourists with 10% of domestic tourists coming from this province.
- KZN is the biggest destination for domestic tourists, with 27% of all trips taken. The Western Cape is the fifth largest destination for domestic tourists (after KZN, Gauteng, Limpopo, and the Eastern Cape), hosting only 9% of domestic trips.

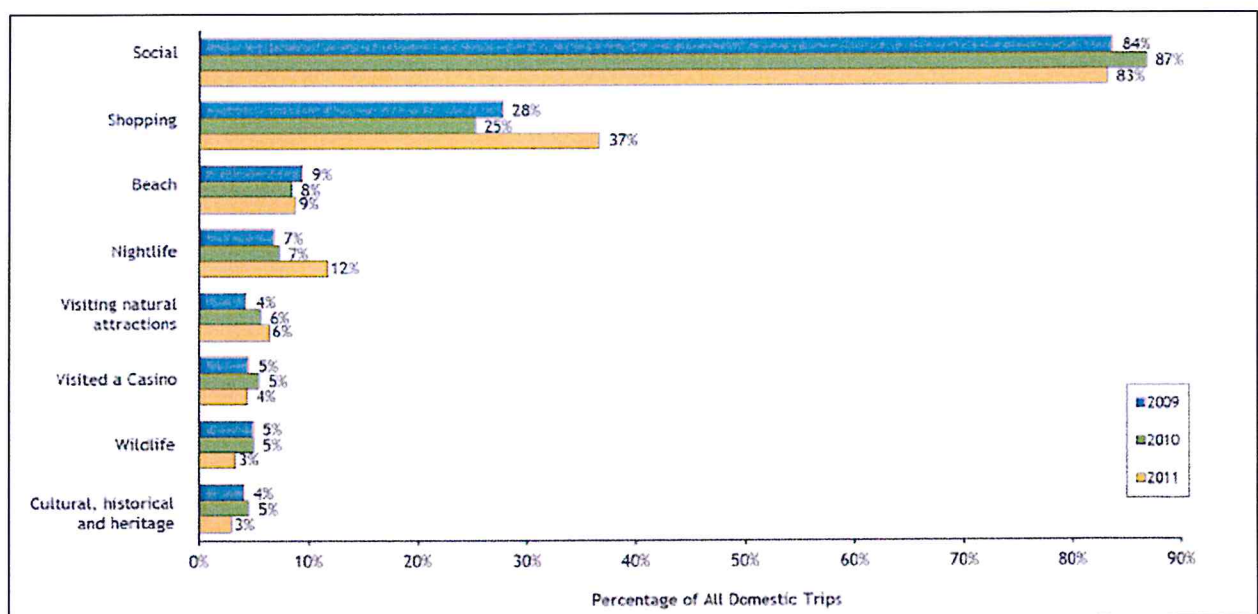
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- As a source market 72% of trips of residents of the Western Cape are intra province (travelling within the Western Cape).
- Seasonality is largely linked to school holidays (Dec and Jan, and July)
- 11.1% fewer overnight domestic trips took place in 2011, with 26.4 million overnight domestic trips in 2011.

3.2.1.2.1 Activities undertaken by domestic tourists

As shown in the following table, most activities undertaken by domestic tourists, were those related to social activities followed by shopping. Activities which can be expected to be undertaken by tourists to the Langeberg (visiting natural attractions, wildlife, cultural and heritage attractions) do not feature highly in things to do for domestic tourists. Shopping however is an activity that can be expected to feature highly in the activities that domestic tourists like to do in Langeberg. It must be remembered however, that, as with foreign tourists, the activities that tourists engage in is largely determined by their purpose of visit. It can be expected that VFR tourists (the primary purpose of visit for domestic tourists) are less likely to engage in those activities that domestic holiday tourists would like to engage in.

Figure 3: Activities undertaken on domestic trips: 2009-2011



3.2.2 PROVINCIAL TOURISM DEMAND

The purpose of this section is to examine the tourism demand in the Western Cape. As with national tourism statistics, Western Cape statistics are provided for both international and domestic tourists. The statistics used here are taken from the Western Cape Destination Marketing, Investment and Trade Promotion Agency (WESGRO) Western Cape Annual Tourism Trends 2012 as well as SAT's Annual

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Tourism report for 2011. Some general key tourism indicators are shown in the following table, and later discussed;

Figure 4: Key tourism performance indicators, WC, 2010-2011

TOURISM PERFORMANCE INDICATORS	WESTERN CAPE	
	2010	2011
Total number of tourist arrivals	1,504,698	1,391,228
Total spend (excluding capital expenditure) from tourists	R21.7b	R18.2b
Total number of bed nights spent by tourists	19,971,821	16,961,520
Total domestic trips	2.7 million	2.4 million
2010/2011 growth in tourist arrivals	-7.5%	
2010/2011 growth in spend from tourists	-16.1%	
2010/2011 growth in number of bed nights spent by tourists	-15.1%	
2010/2011 growth in domestic trips	-11.1%	

Source: (WESGRO, 2011)

3.2.2.1 Foreign tourism

3.2.2.1.1 Broad foreign tourism statistics

The Western Cape is the second most visited province by foreign tourists, with 16.7% of tourists visiting this province. Gauteng is the most visited province with 46.3% of tourist arrivals visiting this province. The Western Cape showed, along with other provinces, a 7.5% decline in the number of tourists during 2011 with 1,391,228 tourist arrivals. The Western Cape received 16.9 million bed nights, the second highest bed nights after Gauteng. This is a 15.1% reduction in bed nights from the previous year.

The Total Foreign Direct Spend by tourists in the Western Cape in 2011 was R18.2 billion, down 16.1% from the previous year.

In terms of source markets, the Western Cape's largest market for tourists arrivals in 2011 was from Europe, following by Africa and the Middle East, the Americas and Asia and Australasia, with the highest bed nights coming from the European market. The following table shows the year on year performance of the source markets to the Western Cape;

Figure 5: Top 10 tourist arrivals to the WC by source market 2010-2011

COUNTRY	2011		2010		DIFFERENCE	%GROWTH
	ARRIVALS	RANK	ARRIVALS	RANK	10/11	10/11
United Kingdom	258,597	1	292,657	1	-34,060	-11.6
Germany	173,058	2	161,418	2	11,640	7.2
United States	147,834	3	148,248	3	-414	-0.3
Namibia	111,579	4	106,906	4	4,673	4.4
The Netherlands	72,861	5	80,781	5	-7,920	-9.8
France	48,915	6	64,048	7	-15,133	-23.6
China (incl Hong Kong)	47,450	7	41,532	-	5,918	14.2
Australia	44,508	8	48,449	9	-3,941	-8.1
Mozambique	39,840	9	65,193	6	-25,353	-38.9
Zimbabwe	37,272	10	63,576	8	-26,304	-41.4
Italy	35,235	-	35,407	10	-172	-0.5

Source: (WESGRO, 2012)

3.2.2.2 Domestic tourism

In terms of domestic tourism to the Western Cape, WESGRO makes use of statistics from walk-ins to tourism offices to understand the profile of its domestic tourists. These statistics must therefore be read with an understanding that this is only the profile of tourists visiting tourism information offices, and will not include those tourists, from those market segments, who don't visit tourism information offices.

The following domestic tourism statistics are important in the development of a tourism strategy for Langeberg and are taken from 2012;

- Visitors from the Western Cape are the leading source for domestic travel within the province
- Visitors from the Western Cape predominantly travelled from July to September, while those originating from Gauteng travelled to the Western Cape from October to December (spring/summer)
- The average travel group size to the Western Cape was three and the largest proportion travelled in pairs (52.7%)
- The overall average length of stay of visitors to the Western Cape was four nights and of the 48.4% of visitors who stayed overnight most of them stayed for one night (20.5%)
- 80% of visitors to the Western Cape travelled for holiday, followed by those who primarily travelled for business purposes.
- 69.5% of visitors to the Western Cape travelled by car, followed by those who explored the respective towns on foot (2%), 1.8% travelled by bus and 1.7% used shuttle services. (Source: (WESGRO, 2011))

3.2.3 CAPE WINELANDS TOURISM DEMAND

As with the provincial tourism demand, the tourist demand within the CWD is calculated by WESGRO through tourism information office walk-ins, meaning that a full tourism picture for the district is not available. It is also likely that some tourists, from some market segments are not available. The following statistics are provided by WESGRO in their document entitled Cape Winelands Annual Regional Tourism Visitor Trends, 2012.

- In 2012, a total of 93,492 walk-ins to the respective tourism offices in the Cape Winelands region were recorded reflecting a steady increase in visitors across the respective quarters of 2012
- The largest proportion of visitors into the respective tourism offices across the CWD were from the overseas (54.8%) market, followed by 42.6% who were domestic and 0.7% originated from Africa (excluding domestic)
- Walk in statistics showed a positive growing trend in travel to the Cape Winelands region among the international market, and visits to the respective tourism offices in the region
- The increase in overseas visitors were driven by those originating from the UK, followed by traditional markets such as Germany, the Netherlands and the USA
- Top three growth markets to the CWD was France, Switzerland, and Austria
- In terms of domestic visitors, the Western Cape dominated as the leading province for domestic travel into the region, followed by Gauteng.
- Visitors from the Western Cape predominantly travelled to the Cape Winelands between April and September while those from Gauteng travelled during the tourism peak season between October and March. Source (WESGRO, 2012)
- In 2012, 71.3% of visitors indicated that they stayed overnight and the overall length of stay in the Cape Winelands was an average of three nights
- Holiday was the leading purpose of travel for 2012, followed by business. This is shown in the following table;

Figure 6: Main purpose of visit by origin region, 2010-2012

PURPOSE OF VISIT	OVERSEAS			DOMESTIC		
	2010	2011	2012	2010	2011	2012
Holiday	82.7%	88.9%	85.9%	82.3%	86.5%	83.0%
Business	0.9%	0.9%	0.8%	2.4%	2.3%	2.9%
VFR	1.9%	0.6%	0.8%	2.0%	0.9%	1.0%
Cuisine	2.3%	0.3%	0.5%	2.0%	0.2%	0.5%
Wine Tours	4.4%	5.8%	6.6%	2.2%	2.6%	2.3%
Weddings	1.0%	0.6%	0.8%	4.0%	3.6%	4.3%

Source: (WESGRO, 2012)

- The highest volume of visitors were received at the tourism offices of Franschhoek, Stellenbosch and Paarl

3.2.4 LANGEBERG TOURISM DEMAND

The purpose of this section of the status quo report is to understand the number and profile of visitors to the Langeberg municipality. No tourism statistics are kept by the municipality or by the tourism associations to assist in understanding the number of tourists who visit Langeberg annually although it is understood that the Montagu tourism office does keep such statistics, which are provided to the province. In order to calculate this, a number of methodologies were used, including national and provincial tourism statistics, tourism accommodation database as provided by the LTAs, and responses of product owners to the tourism product owner survey.

3.2.4.1 Number of tourists to Langeberg

The table below gives an estimate of the number of tourists visiting Langeberg which is summarized thereafter. The following points are important in understanding the source and methods used to calculate visitor numbers;

- That there are 219 tourism accommodation facilities in Langeberg (Source, tourism product database from LTAs). It is possible that tourism accommodation products are available in the municipality who do not belong to a LTA. This would mean a possible undercount in tourism establishments.
- The total number of beds available as reported by the 46 accommodation product owners who were surveyed, indicated 472 with an average nightly capacity of 35.21 guests. However, three products offer in excess of 170 beds per night, which could skew the estimate of capacity across all accommodation products in the municipality. For this reason, a median average was calculated. The median average capacity is beds or capacity within each accommodation establishment
- This means that there is a nightly capacity to host 3504 visitors each night
- That high season and low season occupancy is as recorded by accommodation owners in the tourism product owners (Source: Tourism product owner survey). This occupancy was used to calculate the total number of visitors to Langeberg across both high and low seasons, each year.
- That high season months include Jan, Feb, March, April, Oct, Nov, Dec and low season months include May, June, July, Aug, Sept (Source: Tourism product owner survey)
- WESGRO tourism statistics were used which show that the average length of stay of visitors to the Cape Winelands was 3.3 nights (WESGRO, 2012).
- Activities and attraction owners within Langeberg were asked to estimate how many of their visitors were day visitors, and how many were spending the night within Langeberg. Only 21 respondents completed this question, which could impact on the findings. The survey found that an estimated 85% of visitors are spending a night within Langeberg, and only 14,7% are day visitors
- The estimated ratio of domestic to foreign overnight tourists is 28:72 (Source: Tourism product owner survey)

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Figure 7: Calculations of total visitor numbers to Langeberg

	0-20% Occupancy	20-40% Occupancy	40-60% Occupancy	60-80% Occupancy	80-100% Occupancy	TOTALS
Mean occupancy rate	10%	30%	50%	70%	90%	
Accommodation availability						
Total number of accommodation establishments in Langeberg	219	219	219	219	219	
Median number of beds available per accommodation establishment	16,00	16,00	16,00	16,00	16,00	
Total number beds available each night	3504	3504	3504	3504	3504	
High Season						
% of accommodation with this occupancy rate	4%	4%	30%	48%	13%	
No. accommodation establishments with this occupancy rate	9,52	9,52	66,65	104,74	28,57	
Average number of beds available per accommodation establishment	16,00	16,00	16,00	16,00	16,00	
Total number of beds available per night per occupancy rate	152,35	152,35	1066,43	1675,83	457,04	
No beds sold per occupancy rate per night	15,23	45,70	533,22	1173,08	411,34	
Total beds sold High Season per day						2 179
Total days high season (Jan, Feb, March, April, Oct, Nov, Dec)						212
Total beds sold high season						461 858
Total number overnight visitors in high season (avg. 3,3 nights CWD)						139 957
Low Season						
% of accommodation with this occupancy rate	22%	46%	26%	7%	0%	
No. accommodation establishments with this occupancy rate	47,61	99,98	57,13	14,28	0,00	
Average number of beds available per accommodation establishment	16,00	16,00	16,00	16,00	16,00	
Total number of beds available per night per occupancy rate	761,74	1599,65	914,09	228,52	0,00	
No beds sold per occupancy rate per night	76,17	479,90	457,04	159,97	0,00	
Total beds sold Low Season per day						1 173
Total days low season (May, June, July, Aug, Sept)						153
Total beds sold low season						179 481
Total number overnight visitors in low season (avg. 3,3 CWD nights)						54 388
TOTAL VISITORS TO LANGEBERG						
Total annual visitors to Langeberg - overnight						194 345
Total annual beds sold						641 339
Estimated additional day visitors to Langeberg annually (21%)						40 812
Total visitors to Langeberg (overnight and day visitors)						235 158

Source: S Moffett calculations based on accommodation owner's survey and association's product database

Langeberg Municipality Tourism Strategy

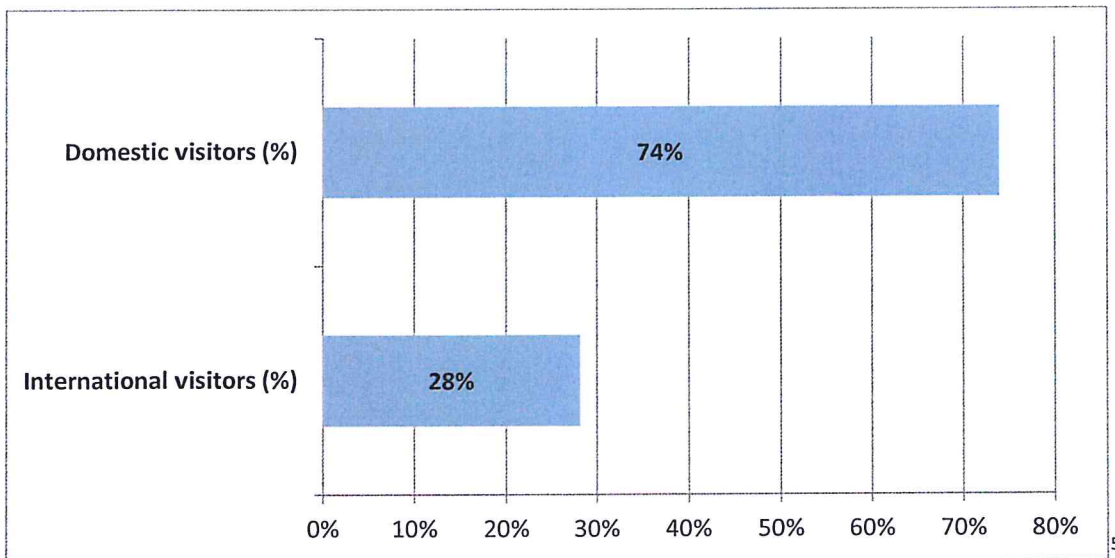
The findings of these calculations are summarized as follows;

- The total number of overnight visitors to Langeberg per year is estimated to be 194,345
- The total number of overnight visitors to Langeberg in the high season is estimated to be 139,957 per year
- The total number of overnight visitors to Langeberg in the low season is estimated to be 54,388 per year
- The total number of bed nights in Langeberg sold per year is 641,339 (average of 3.3 bed nights per overnight visitors)
- The total number of day visitors to Langeberg per year is estimated to be 40,812 (an additional 21% of overnight visitors)
- The total number of visitors to Langeberg each year (day and overnight visitors) is 235,158 meaning an average of 644 visitors per day.

3.2.4.2 Profile of visitors to Langeberg

Tourism product owners in Langeberg were asked to estimate what percentage of their visitors where from international markets, and what percentage was from domestic markets. The results of this question show that three quarters of the visitors to the Langeberg Municipality are from within South Africa, as shown in the graph below;

Figure 8: Langeberg source markets by international and domestic



⁵ Note that the total does not add up to 100% due to the calculation of a response average

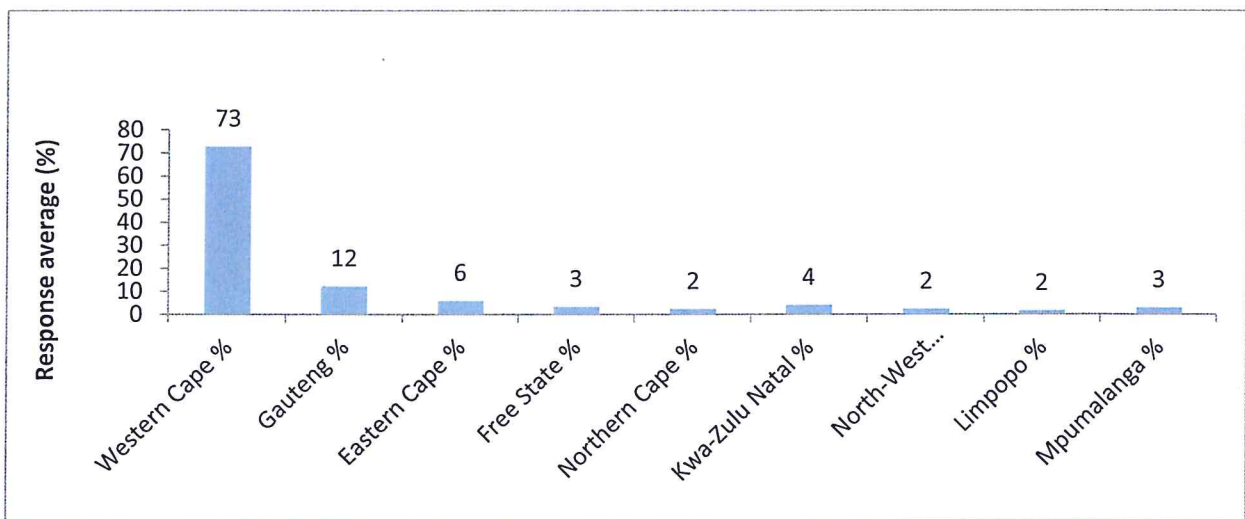
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Source: Langeberg tourism product owner survey, 2013

A number of accommodation owners however, report just the opposite, with 70% visiting by international guests, and 30% domestic. It is important to note that most of these are graded 4 star by the TGCSA, and it can be expected that these products specifically target international clients. None of the non-accommodation product owners however report receiving more international than domestic tourists.

In terms of what provinces the domestic visitors to the tourist accommodation and attractions come from, the following graph shows that nearly three quarters of the domestic visitors to Langeberg are from the Western Cape, with Gauteng being the source of 12% of domestic visitors, and the Eastern Cape, providing just 6% of local visitors.

Figure 9: Source of domestic visitors by province and response average

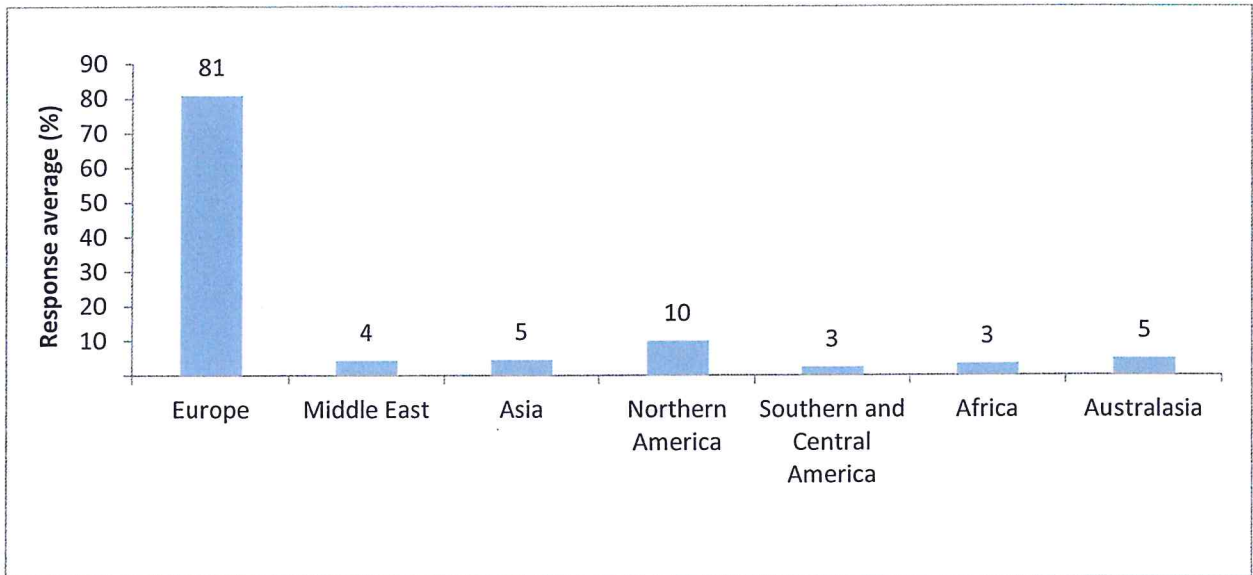


Source: Langeberg tourism product owner survey, 2013

To determine the source markets for international tourists, tourism product owners were requested to estimate the percentage of tourists from each region. The following table shows that the vast majority of international tourists come from Europe (81%), followed by tourists from North America (10%). As explained above, this trend is different from national tourism statistics, where African source markets dominate, but consistent with Western Cape statistics, where European markets dominate.

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Figure 10: Source of international visitors by region and response average

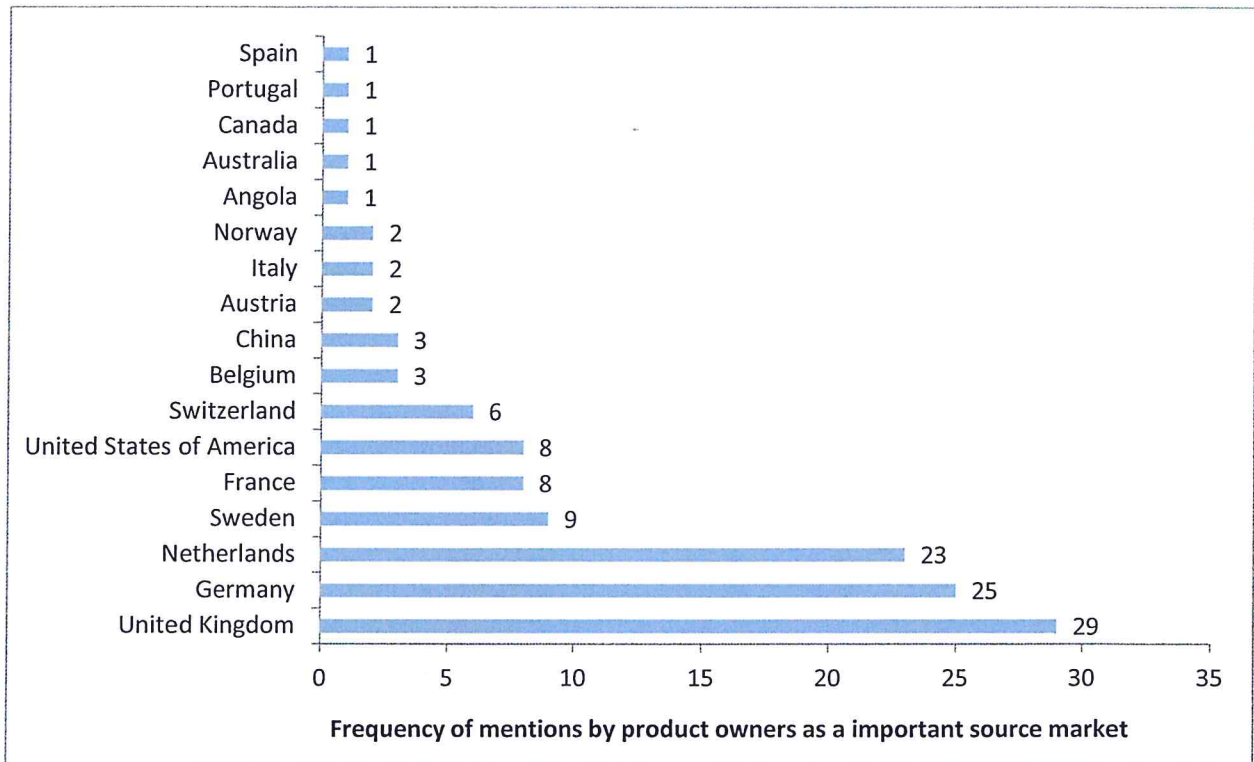


Source: Langeberg tourism product owner survey, 2013

Tourism product owners were asked in the survey to indicate from which countries most of their international visitors came, in order of most common visitors⁶. The following graph indicates the frequency with which product owners noted particular countries as being important source markets for the tourism industry in Langeberg.

⁶ Note, where product owners had indicated "America ", this was changed to "United States of America". Where product owners had indicated "Asia" or "Europe", these responses were deleted. "Scandinavia" was also deleted as an option.

Figure 11: Source countries of international tourists to Langeberg



Source: Tourism product owner survey, 2013

The United Kingdom received the most mentions as a country from which “most of the international visitors come from”, followed by Germany, the Netherlands, and Sweden. Interestingly, this aligns with the previous paragraph where respondents noted that 81% of their international tourists were from Europe. Of particular interest is that the primary source countries for South Africa are different to that for both the Langeberg and the Western Cape.

Implication for tourism strategy: Marketing should be targeted towards the source markets currently coming to Langeberg, and packages should be built according to statistical information on what kind of products and activities they engage in when in the country. Marketing and suggested itineraries should also be targeted to identified source markets who do not currently come to Langeberg.

3.2.4.2.1 Purpose of visit of tourists to Langeberg

Tourism product owners were asked a number of questions to determine why tourists visit Langeberg. A number of possible reasons were provided, and product owners were asked to select if that purpose of visit applied to;

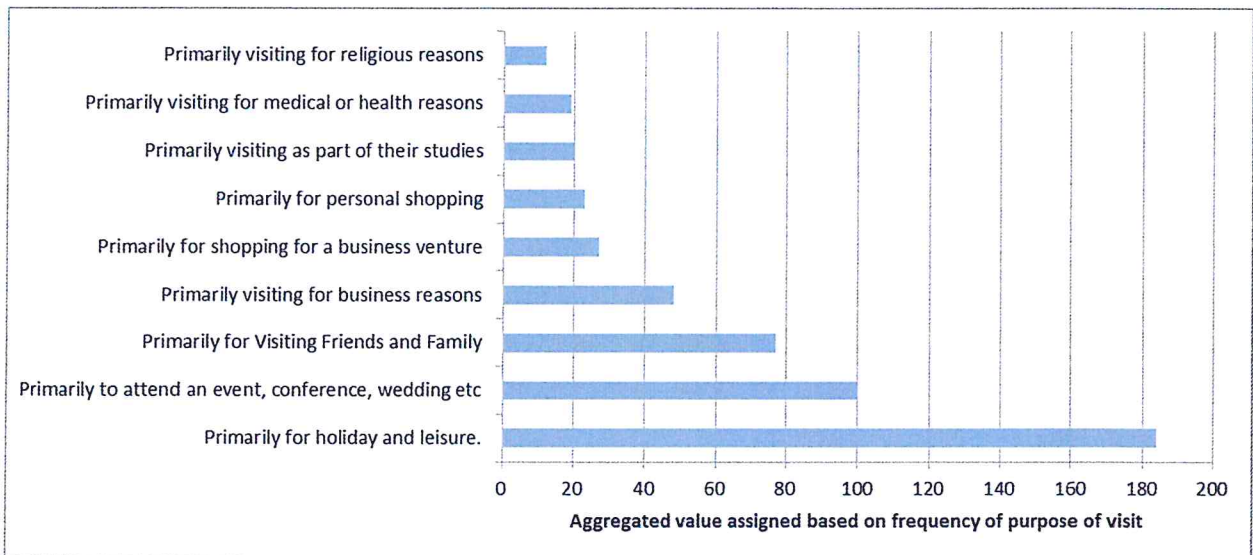
- Most of our tourists
- Some of our tourists

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- Not many of our tourists
- None of our tourists

A value was assigned to each selection option, with the highest value “3” assigned to “most of our tourists”, and in decreasing value to the other options, with the value of “0” assigned to “none of our tourists”. The following table shows the findings of these questions with is shown graphically by a graph thereafter;

Figure 12: Purpose of visit of tourists to Langeberg by frequency of response



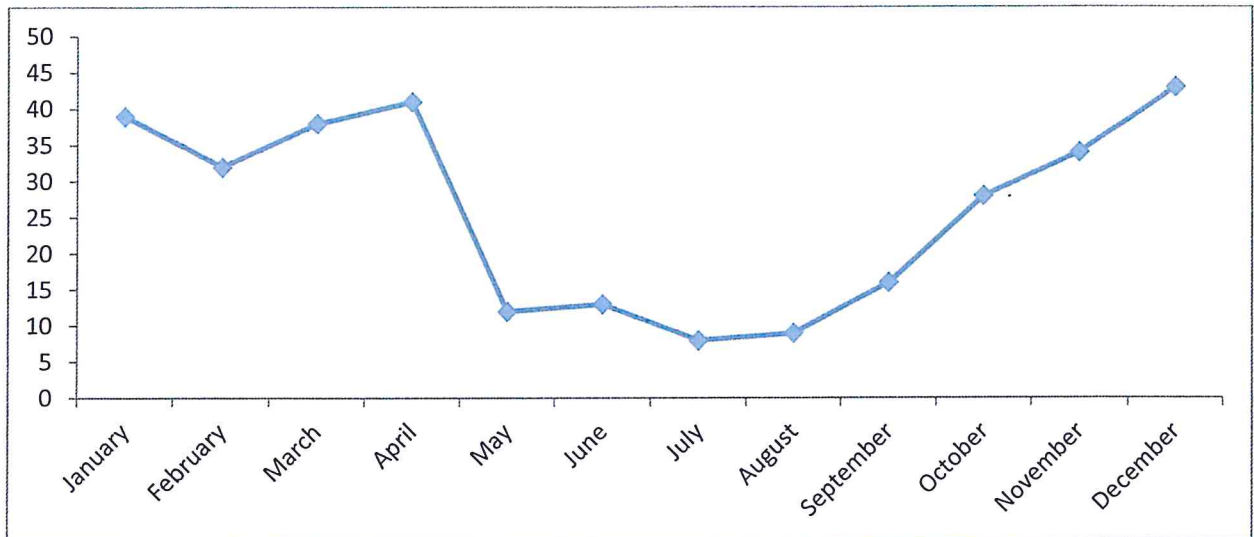
Source: Product owner survey, 2013

According to tourism product owners, the vast majority of tourists coming to the Langeberg area do so for holiday purposes. This is followed by persons attending an event, conference, wedding etc.

3.2.4.2.2 Seasonality of tourism in Langeberg

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Figure 13: High season for accommodation owners by responses per month



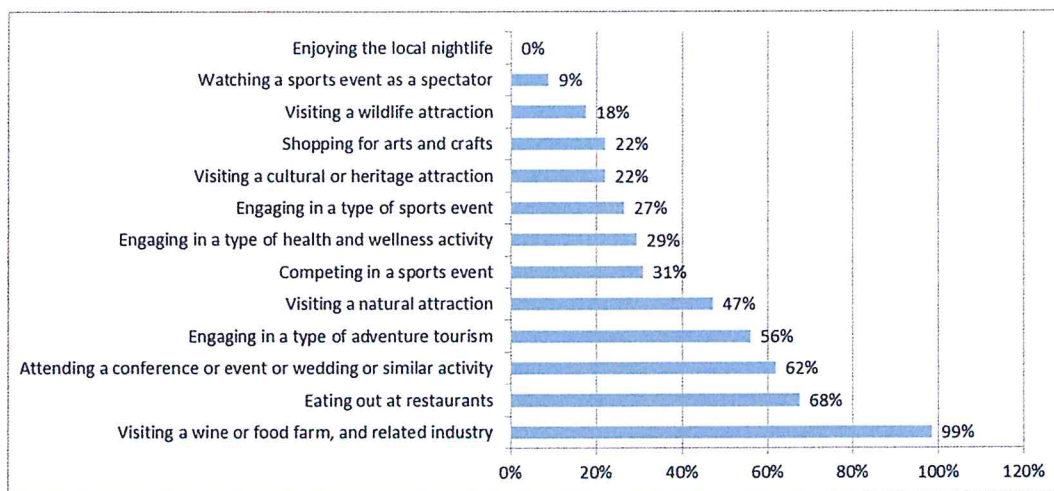
Source: Product owner survey, 2013

A similar response was received from attraction and activities owners within Langeberg.

3.2.4.3 Activities undertaken in Langeberg by visitors

Tourism product owners were requested to indicate the 5 most popular activities which tourists who are visiting the area engaged in while in Langeberg. The following graph shows the results of this question⁷;

Figure 14: Tourism activities most engaged in by tourists, but percentage of total activity selection

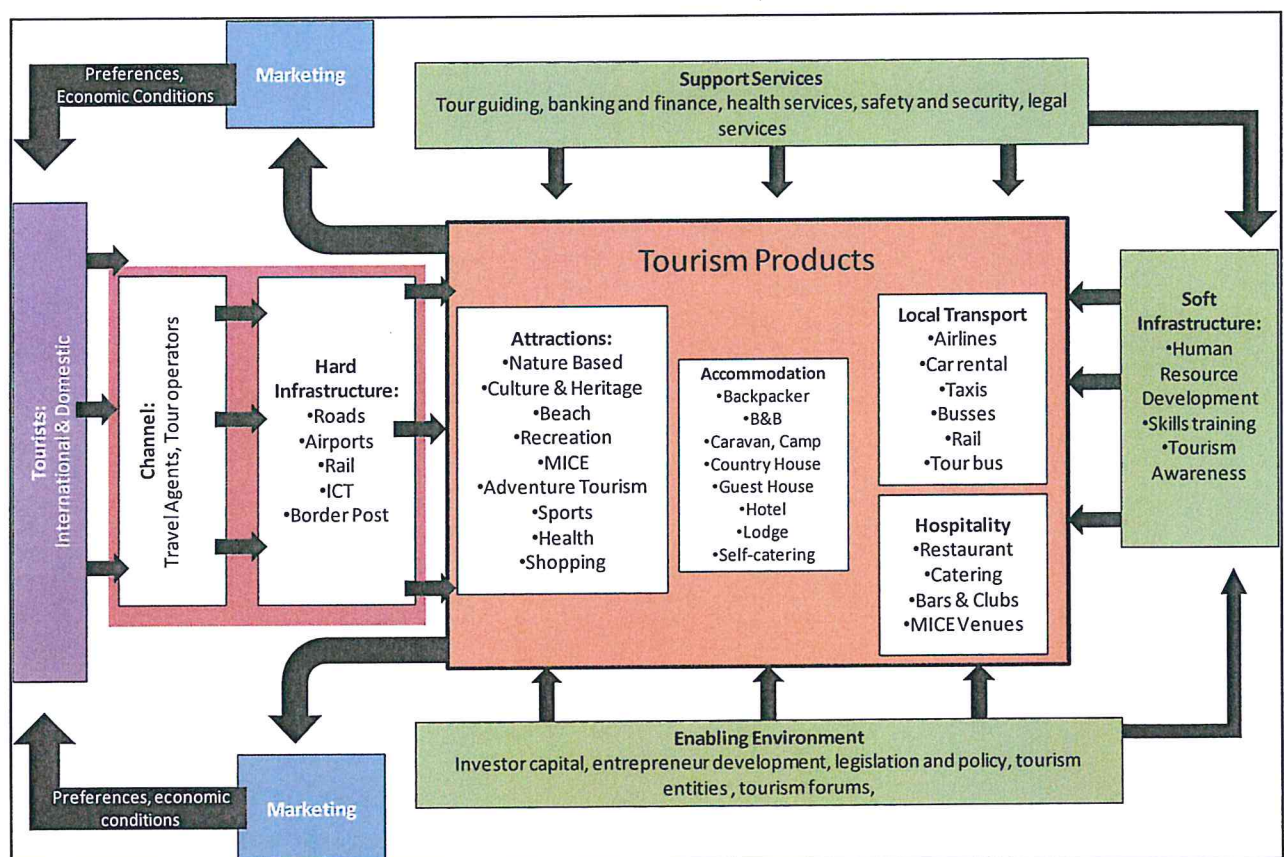


⁷ Note that the activities undertaken by tourists are often used in understanding the profile of tourists within Langeberg – therefore a demand factor. However, it is analysed here to gain a better understanding of the products on offer within the municipality.

Source: Tourism product owner survey, 2013

3.3 TOURISM PRODUCT AND SERVICES SUPPLY IN LANGEBERG MUNICIPALITY

The **supply side** of tourism focuses on all products and services that exist within a given area to meet tourist demand when tourists are visiting that particular area. It is important to note that a supply side analysis often concentrates on products only, such as accommodation and activities available to tourists when in the area. Such focus often limits the growth of a local tourism sector as there are a number of other conditions or institutional arrangements necessary for a tourism sector to grow. It is therefore important to consider tourism as a system with different factors that interact with one-another to ensure that the tourism system as a whole operates optimally. Tourism supply can therefore be explained by the diagram below. As can be seen, products are only one component of the system, and other important factors include the enabling environment for tourism to flourish, infrastructure, marketing and support services. The approach used in this study to develop a tourism strategy for



Langeberg is to examine supply in a systematic manner and to ensure that all components of the system are addressed in the sector plan.

This section of the status quo analysis therefore examines the supply of tourism products, with a specific focus on the elements outlined in the diagram above.

3.3.1.1 The supply of accommodation in Langeberg

The product databases from the tourism associations within Langeberg were used to determine the accommodation that exists within the municipality. Unfortunately, some of the databases specify what type of accommodation each member has in terms of guest house, self-catering etc., but other databases merely stipulate “accommodation” or “guest house”. It is therefore not possible to fully determine the types of accommodation within the municipality. Where it was possible to determine the type of accommodation from the name, or through internet research, the sub category of accommodation was added. Where this was unable to be determined, “accommodation – unknown” was added.

Furthermore, it must be noted that some accommodation establishments offer different types of accommodation, such as “self-catering and camping” or “B&B and self-catering”. Furthermore, many products within Langeberg offer activities as well as accommodation. They are listed in the database as either accommodation or the activity offered, or both.

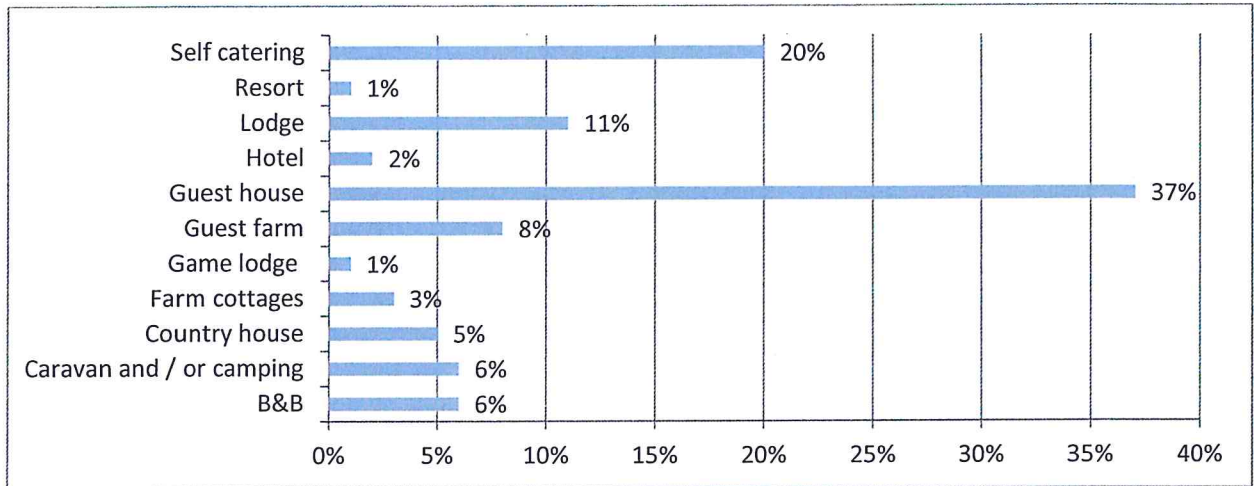
Furthermore, it is assumed that product owners who are not members of the relevant tourism associations, are not listed on the databases provided. It can therefore be expected that there are more products within Langeberg than those listed in the databases provided by the tourism associations.

Given the above, it is difficult to determine a full list of accommodation (and products available) within Langeberg.

With the recoding of the database as listed and noting the limitations of the process, the reworked database shows that there are 219 accommodation products listed within Langeberg. The following graph shows the total number of products by accommodation sub categories, where the category was known. In addition to these products, there are 118 accommodation products, where the sub-category is unknown. A full understanding of these unknown products could significantly change the understanding of what types of accommodation are on offer in the Langeberg.

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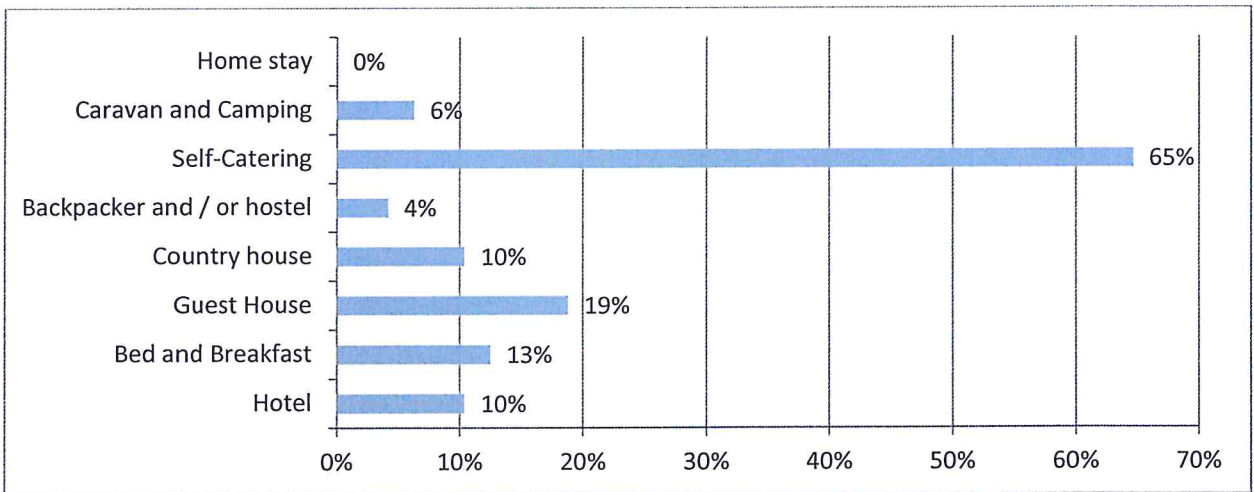
Figure 15: Types of accommodation sub categories as % of total known accommodation types on database



Source: Recoded tourism product database as supplied by tourism associations

Looking then at the survey done with product owners, the accommodation owners were asked to specify what type of accommodation best describes their offering. The following graph shows the 48 responses to this question;

Figure 16: Types of accommodation sub categories as % of total survey responses



Source: Product owners survey, 2013

As well as the accommodation products listed above, there are also 3 “home stays” within Robertson. The development of such types of accommodation products is being coordinated by the CWD municipality.

Implication for the tourism strategy: A detailed product database which includes all tourism products within the municipality should be created, and maintained regularly, to allow for future assessment on

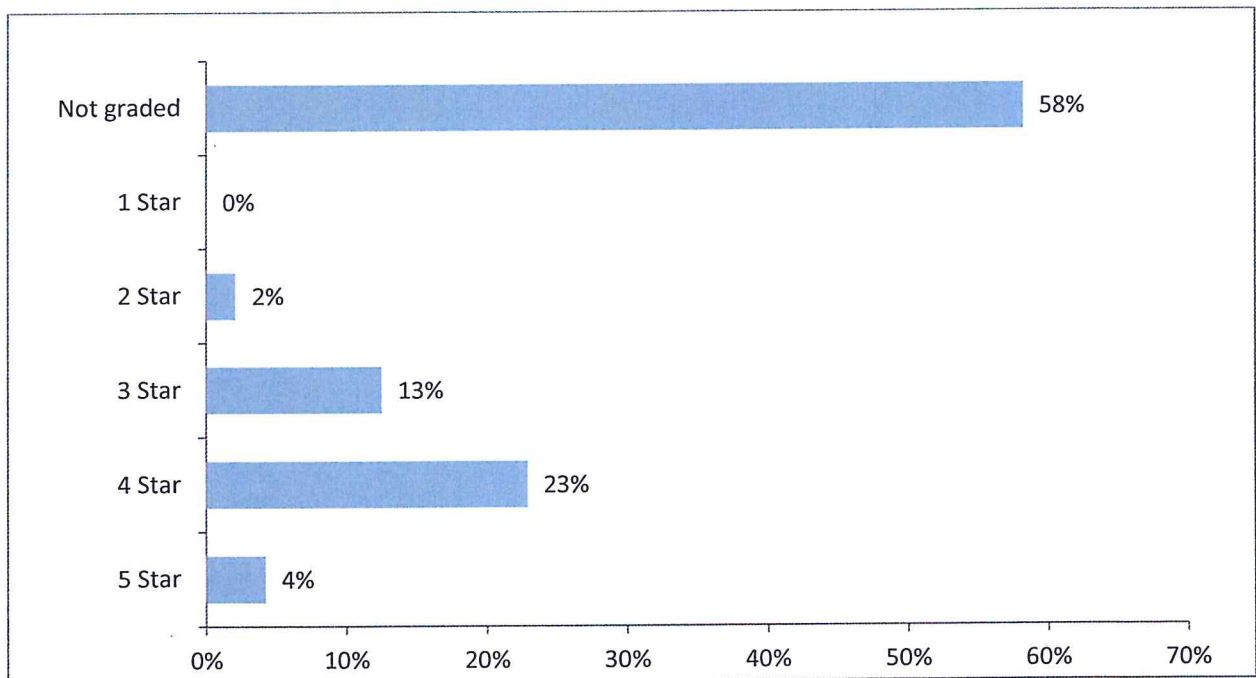
growth or contraction of tourism products, as well as the understanding of the types of products in existence in Langeberg.

It is clear that the Langeberg Municipality is home to a wide variety of accommodation establishments.

3.3.1.1.1 Grading of tourism accommodation within Langeberg

This voluntary grading system, which was launched in 2001, uses internationally recognised star insignia to rate accommodation establishments initially, and has been extended to include relevant businesses in classified sectors of the tourism industry, such as conference venues. As such, the stars awarded given an indication to tourists on the quality of the service that they can expect at the graded establishment. Once graded, establishments are encouraged to utilise the star system for marketing and advertising purposes. As part of the tourism product owner's survey, accommodation owners were requested to indicate whether they were graded by the TGCSA, and what star grading their accommodation. The results shows that very few products are graded within Langeberg, although it must be noted that of the estimated 219 accommodation establishments, only 48 accommodation establishments answered this question, and of these, only 20 were graded. The following graph shows that of the respondents, and those graded, nearly one quarter have a four star grading, with a three star grading being the next most frequent. Only 4% of accommodation has the coveted 5 start grading.

Figure 17: TGCSA accommodation grading in Langeberg by percentage of total survey responses



Source: Langeberg tourism product owners survey, 2013

3.3.1.1.2 Size of accommodation establishments

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Tourism product owners were asked the number of rooms and beds that they had within their establishment.

Figure 18: Accommodation capacity in Langeberg

	Response Average	Response Total
Total number of bedrooms in your establishment?	10,26	472
Accommodation capacity (total number of people who can sleep in one night)	35,21	1 655

Source: Langeberg tourism product owner's survey

It must be noted that only 47 of the estimated 219 accommodation facilities in Langeberg responded to this question. Furthermore, one establishment listed a capacity of 350, while other high capacity responses were 300 and 170. These large establishments, one a lodge, and another, a resort⁸ significantly skews the understanding of the average capacity of accommodation establishments within Langeberg. Therefore, using an 'average' to determine the average capacity of accommodation products within Langeberg will be skewed because of the three establishments with very high capacity, average capacity is rather calculated using a 'median' for this purpose⁹. The median capacity in the accommodation establishments in Langeberg is 16.

3.3.1.2 Tourism activities and attractions in Langeberg

This section examines the status quo of tourism activities and attractions within the LLM. This is done through a short summary analysis of some of the key types of attractions available, but begins with a few comments on attractions in general.

3.3.1.2.1 General comments on activities and attractions in Langeberg

The Langeberg municipality is fortunate to have a wide variety of diverse tourism products within its boundaries. These range from adrenalin activities such as water sports, rock climbing, nature based activities such as hiking game viewing, health and wellness activities and products, shopping activities, sports etc. There are two points that need to be made about the available products in Langeberg;

- There appears to be a shortage of child friendly products across the municipality.
- Product owners reported that many of the tourists places are closed on Sundays, which impacts on the selling the municipality as an ideal weekend destination.

⁸ Note that one resort completed the survey twice, once with a 350 capacity, and again showing a 300 person capacity. It is not clear if this was done due to the resort having a hotel, self-catering and chalet component.

⁹ A median is the middle number of a group of numbers; that is, half the numbers have values that are greater than the median, and half the numbers have values that are less than the median

3.3.1.2.2 Visiting a wine or food farm, or related industry

This activity, according to product owners, is the most popular in Langeberg with respondents to the survey indicating that 99% of visitors engage in such an activity. Tourism product owners widely consider the wine industry as the anchor for tourism in the municipality. This is supported by an analysis of the tourism product database, which shows that wineries and related tourism products are the most common of all tourism products in the Langeberg. Furthermore, there are 9 farm and related products and activities that appear in the database. Given that agriculture and agro-processing, particularly around wine, and fruits, are the main economic drivers in the Langeberg, it is to be expected that tourism products related to this form the foundation for tourism in Langeberg. The Robertson Wine Route links these wineries, and does extensive marketing for their member wineries. In fact, the name “Robertson” has a strong brand identity amongst wine drinkers, more so than Langeberg. Likewise, the name Montagu is strongly associated with the dried fruit industry. Tourists are able to visit the fruit drying facilities within Montagu, and purchase goods from the farm stalls. Likewise, most of the wineries have shops and some of the farms in the area offer goods to tourists through their farm stores. Furthermore, some of the wine farms in the area offer conferencing and host events such as weddings, birthday celebrations, and many have some kind of accommodation available to tourists. Furthermore, some of the wine farms have mountain bike routes between them, but this is not very established.

Some of the farms offer tourists an experiential visit, allowing visitors to pick grapes and fruit. Others offer working holidays being both experiential and educational;

“As a working holiday on this traditional South African fruit and wine farm, guests can enjoy the adventures and seasons of farming and living, harvesting of the fruit; making of one’s own wine, mampoer and preserves; bee keeping, hiking, swimming, mountain biking and fun tractor rides into the mountain.”¹⁰

¹⁰ <http://www.farmerredbeard.co.za/>



3.3.1.2.3 Restaurants

Restaurants are the second most common activity or attraction within Langeberg making up 38 of the products available on the member database. This is to be expected given the large number of accommodation establishments, and other products within Langeberg. It is not known if restaurants are a draw card for tourists to visit the area, or if they are merely a value add to tourist experience once they are in the Langeberg Municipality.

3.3.1.2.4 Conference and events

Conferences and events, such as business conferences, team building, sports events, weddings etc. can be an important driver of tourism in an area. Events attract tourists, in particular domestic tourists to an area, and can be an important marketing tool for an area and also stimulate other tourism products such as accommodation, restaurants, purchases of arts products etc. Events can be used to address seasonality in an area, attracting tourists in months with few tourists. Events can be around heritage or adventure or sports races etc, or, in the case of the Langeberg, a celebration and showcase of the products produced within the municipality.

The product database only lists two conference or events facilities, and has two “sports” facilities listed. It can however be expected that some of the bigger accommodation or attractions, such as wineries have facilities for smaller conferences, weddings, birthdays etc. These products would have been listed primarily as an accommodation establishment. Furthermore, many of these events are over multiple venues, and will not be registered as a product as such, and will therefore not necessarily be listed on the database.

The ‘activities engaged in by tourists’ graph shows that “attending a conference or event or wedding or similar activity” is the third most common activity engaged in by tourists when in Langeberg. Furthermore, 31% of tourists compete in a sports event when in Langeberg, with a further 9% watching a sports event as a spectator. Wedding tourism is seen as an important driver of event tourism in Langeberg, given the areas close proximity to Cape Town. Furthermore, events within Langeberg are

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seen to be important in creating inter-town tourism, encouraging visitors from one town in the LLM to visit others.

Some of the events hosted in Langeberg are provided in the table below;

Figure 19: Events within Langeberg

Breyten Breytenbach Literary Festival	Montagu
Montagu Youth Arts Festival	Montagu
Heita Hello Heritage	Montagu
Montagu Makiti	Montagu
Hands-on Harvest	Robertson wine valley
Wacky Wine Weekend	Robertson wine valley
Robertson Slow	Robertson wine valley
Robertson Wine on the River	Robertson wine valley
McGregor Poetry Festival	McGregor
McGregor Food & Wine Festival	McGregor
Ride2Nowhere	McGregor
McGregor Open Gardens	McGregor
McGregor Apricot Carnival	McGregor
Swallows Rally	Robertson
Robertson fees	Robertson
Fun Enduro	Robertson
WP ATV Enduro	Robertson
Robertson Slow festival	Robertson
Landbouvereniging Dans	Robertson
K2 Breede River Canoe Marathon	Robertson
Off Road day @ Zevenfontein	Robertson
Robertson Lente skou	Robertson
Bonnivale Bonanza	Bonnivale
X tri Series on the Breederiver	Robertson

Source: Information provided by tourism associations

The municipality is also a host to the internationally famous “Cape Epic”, an 8 day, 800km mountain bike ride, which is ridden by 1200 riders. The ride goes primarily through Robertson while in the LLM.

Implications for tourism strategy: This is clearly a very important product segment to the Langeberg tourism sector and a driver for other sub-sectors of the tourism economy in the LLM. The relatively short distance from Cape Town to the towns within Langeberg, makes this an ideal venue for conferences, events or weddings, where visitors are able to get away from the city with a short driving distance, into natural surroundings. Furthermore, there is potential team building or educational trip potential within the Langeberg which can be explored further. The tourism strategy should look to

growing this market segment, given the short distance to Cape Town, and the current strength of this sub sector in attracting tourists to the Langeberg.

3.3.1.2.5 Nature based and adventure tourism

While not currently one of the drivers of tourism in Langeberg, given the natural surroundings and natural attractions of the towns in Langeberg, and the presence of adventure tourism activities and potential around hiking and bike riding, as well as water sports, more can be done to grow this as a draw card for tourists. According to the product database, there are 8 adventure tourism products within Langeberg, and one boating activity, and one natural attraction. However, many of these adventure products offer a number of different types of activities, and many adventure type activities can be done independently by tourists. It is expected that many of the product owners rent out bikes or boats, or take their visitors on hikes to visit the natural attractions in the area. The database is therefore not expected to be a true reflection of the nature based and adventure tourism attractions within Langeberg.

There are numerous hiking trails within Langeberg, primarily in Montagu and Robertson, which are on municipal land. It is reported by tourism stakeholders that the trails in the area are in an extremely bad condition, and pose a safety risk to persons hiking in the area. The municipality is responsible for maintenance of some of these hiking trails, although it needs to balance this with all the other developmental objectives that they have. An eco-club staffed by volunteers assist in maintenance and cleaning of some of the walking and hiking routes in the area. It is reported that the walking trail between Essyenhuis & Avalon Springs has been recently closed for this reason. Other important hiking trails include in Nuy River Gorge (from Simonskloof all the way to Worcester), the McGregor – Greyton hiking trail etc. One of the wine farms has created a hiking route, the Excelsior wine hike route. While the municipality has two brochures for hiking and it is assumed that other maps exist for different routes, there is no comprehensive hiking map for the area.

The Monagu Mountain Reserve is a 2000ha local authority reserve to the north, west and south of the town of Montagu. As such, it is managed by the municipality, and there is an advisory board in place, where volunteers advise the municipality on management of the reserve. The reserve offers easy walking access from the town to visitors and residents and has 4 trails and 4 walks. It is home to the adventure tourism activity of rock climbing, with 200 bolted routes which are acclaimed by local and international rock climbers. Very little information is available on this reserve for potential visitors, with only a contact telephone number on the LLM website¹¹ and a Facebook site, which gives little information about the reserve to potential visitors.¹²

¹¹ <http://www.langeberg.gov.za/index.php/component/mtree/langeberg-tourism/langeberg-attractions-and-activities/nature-reserves/montagu-mountain-reserve>

¹² <https://www.facebook.com/montagumountainreserve?fref=ts>

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According to the South African National Biodiversity Institute (SANBI), there are 12 formal protected areas in Langeberg Municipality covering 79752.7ha (23.9% of municipality) as follows;

Figure 20: Formal protected areas in Langeberg Municipality

Name	Category	Size
Dassieshoek Local Nature Reserve	Local Authority Nature Reserve	753.3ha (0.23% of municipality)
Greyton Local Nature Reserve	Local Authority Nature Reserve	0ha (0% of municipality)
Langeberg -Wes Mountain Catchment Area	Mountain Catchment Area	36315.8ha (10.9% of municipality)
Marloth Nature Reserve	State Forest Nature Reserve	2248.4ha (0.67% of municipality)
Matroosberg Mountain Catchment Area	Mountain Catchment Area	9047.2ha (2.72% of municipality)
Montagu Eeufees Nature Reserve	Local Authority Nature Reserve	14.7ha (0% of municipality)
Montagu Mountain Local Nature Reserve	Local Authority Nature Reserve	1194.7ha (0.36% of municipality)
Riviersonderend Mountain Catchment Area	Mountain Catchment Area	21530.1ha (6.46% of municipality)
Riviersonderend Nature Reserve	State Forest Nature Reserve	4999.6ha (1.5% of municipality)
Twistniet Nature Reserve	State Forest Nature Reserve	1182.3ha (0.35% of municipality)
Vrolijkheid Nature Reserve	Provincial Nature Reserve	1962.9ha (0.59% of municipality)
Witbosrivier Nature Reserve	State Forest Nature Reserve	503.6ha (0.15% of municipality)

Source: <http://bgis.sanbi.org/municipalities/summaries.asp?muni=WC026>

Furthermore, there are a number of conservancies, such as the Rooiberg Conservancy, and one game reserve listed in the product database.

Linked to conservation, bird watching is growing as an important nature based tourism activity across South Africa. Avi-tourism is reported to be potentially important in the Langeberg area, with the CWD having a birding map available.

In terms of adventure tourism, an examination of the websites of the LTAs, the following are important activities linked to this type of tourism activity;

- Rock climbing
- Hiking and trail running
- Rafting down the Breede River, particularly between Ashton and Robertson
- 4x4 trail
- Kloofing and abseiling
- A zip line in the Koo valley
- Boat trips
- Horse riding
- Paragliding
- Etc.

Langeberg Municipality Tourism Strategy

According to the 'popular activities' engaged in when in Langeberg question to the product owners, they indicated that 56% of visitors engage in a type of adventure tourism, 18% visit a wildlife attraction, and 47% visit a natural attraction. This is therefore clearly an important activity and attraction to tourists to visit the Langeberg.

There is currently no adventure map for the area, and each town or products market their adventure activities independently. This constrains the marketing of the area as an adventure destination. It was reported that there had been a proposal to open an adventure center within Montagu, but funding was not available for this.

Implications for tourism strategy: The tourism strategy needs to look at how to raise the profile of the Langeberg as a destination for adventure and nature based tourism, either through new product development, better profiling of the adventure and nature based products, and marketing and packaging tourism products linked to this kind of activity. Furthermore, the infrastructure for such activities needs to be developed, and regularly maintained.



Source: <http://www.montagu-ashton.info/detail.php?id=498>

3.3.1.2.6 Health and wellness

According to tourism product owners, 29% of visitors to Langeberg engage in some kind of health and wellness when they are in the area. According to the LTA member's database, there are 14 health and wellness facilities within Langeberg, the majority of them in McGregor, but also with a number of related products in Montagu. They include healing centers, massage, and hair and beauty treatment facilities. Also prominent in the health and wellness category are the hot springs in Montagu.

3.3.1.2.7 Sport in Langeberg

There are only two sports facilities listed under the LTA database, both of them golf courses. However, many of the adventure tourism activities, such as hiking, walking, rock climbing, river rafting etc., as discussed above, can also be considered as sports activities. Likewise, when tourists stay at an accommodation facility, and take a ride on a mountain bike, this is also a sports activity. According to

the tourism product owner's survey, many tourists come to Langeberg to take part in or watch a sports event. This is covered in the section above. It is clear that sports, outdoor lifestyle activities, or official sports events are important drivers of the tourism sector in Langeberg.

Mountain biking is especially prominent in the Langeberg, with a number of mountain bike trails in the area. Its prominence is boosted by the Cape Epic mountain bike route, which goes through some parts of, in particular, the Robertson area. The MTB industry is not as prominent as it is in other areas in South Africa, and a gap exists which can be built on. It is noted that a tourism entrepreneur has recently begun formalization and creating of MTB routes, particularly around the Montagu area.

Another type of sports activity within the LLM, also linked to nature based tourism, is trail running, which is a growing sport in South Africa, and still relatively undeveloped in Langeberg.

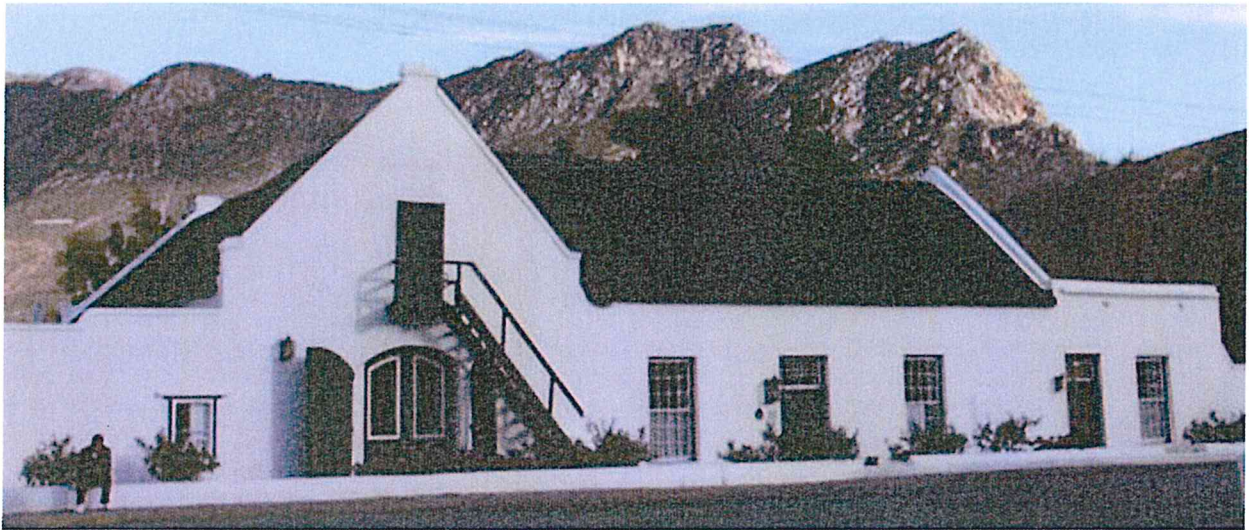
3.3.1.2.8 Cultural, historical and heritage attractions

Respondents to the tourism product owner survey stated that 22% of visitors to Langeberg visit a cultural or heritage attraction while in the area. As a very historical area, it can be expected that there are a large number of historical products within the towns making up the municipality. The tourism product owner database lists only two museums. As stated previously, there is a walking route through Montagu to visit the 14 national monuments and other historical buildings within the town. "The old English" fort is another heritage facility that does not appear on the database. Likewise, some of the old churches in Langeberg are heritage buildings, but information on these buildings are not easily accessible for tourists. However, booklets on the historical buildings can be found in the Montagu – Ashton tourism information office.

An "aesthetics committee" is in existence in some of the towns within the LLM, to ensure that future development in the towns is not in conflict with the historical building styles within the towns. It is noted that these committees are largely advisory, and have no 'legal teeth'.

There appears to be a shortage of cultural products within the area. However, many of the art facilities could be considered as cultural offerings for tourists.

Implication for tourism strategy: A more comprehensive database of tourism products for the municipality is required, that does not rely on the membership of the LTAs to understand the product offering. This should include government owned buildings, or sites that do not have owners. The tourism strategy should look towards including cultural offerings in packages to tourists, or, where no such products exist, creating the environment for such products to be developed.



3.3.1.2.9 Arts and crafts

There are a number of arts and crafts outlets, galleries and studios within Langeberg. A total of 12 art studios, galleries, and potteries are listed on the database¹³. The majority of these are in McGregor but activities related to the arts can be found across all towns in Langeberg. As discussed earlier, there is an art route in McGregor, with the visitor able to visit 10 galleries or studios across the town. According to the tourism product owner survey, 22% of visitors shop for arts and crafts when in Langeberg. It is noted that there are currently few art and craft outlets related to art works created in the township areas of the municipality. Although, some of the establishments do sell art works produced by township residents. Members of the Montagu – Ashton tourism association have considered the creation of an 'artisanal route' through the township areas adjacent to Montague, to provide exposure and sales opportunities to the artists, and to give the visitors a unique experience.

3.3.1.3 Tourism routes

A tourist route is an initiative that brings together a variety of activities and attractions, under a unified theme. One of the main reasons for the development of a route connecting various tourism products is that often, the tourism enterprises that are linked by the route are usually small, and the collective marketing of the route, increases their viability. Without a route, and the marketing thereof, many of the products on a route would not be viable as standalone products. The development of a route therefore increases their visitor numbers, and consequently, their viability. Tourists are therefore attracted to the route itself, and then dispersed to the various attractions along the route. The tourism routes within and connecting to Langeberg are outlined below;

3.3.1.3.1 Route 62

¹³ Note it is expected that the database used for this analysis is not inclusive of all products related to arts, crafts, and related businesses.



According to the Route 62 website, the “Cape Route 62 is the tourist route in the Western Cape and Eastern Cape, South Africa, that meanders between Cape Town and Oudtshoorn, the Langkloof and Port Elizabeth, offering the shorter, scenic alternative to the N2 highway”, (<http://www.route62.co.za/>). As such, the route travels through the Langeberg towns of Montagu, Ashton, Bonnievale, Robertson, and McGregor. As such, the Route 62 acts as a good marketing mechanism for the towns within Langeberg, and the products available on the route. While no statistical information is available on the numbers of persons who visit the Langeberg through embarking on the route, it is expected that the route does increase visitor numbers to the municipality and the towns included on the route.

3.3.1.3.2 Robertson Wine Route

The Robertson Wine Valley is a group or route within Langeberg, which connects more than 50 wineries through a route, a map, and information on the Langeberg, the towns, and the wine industry.

<http://www.robertsonwinevalley.com/>

3.3.1.3.3 McGregor Art route

The McGregor Art Route connects the artist galleries and or studies within the town, enabling and encouraging tourists to visit the 10 art related products within the town. They have a website, <http://www.artroutemcgregor.co.za/> and maps available to assist tourists. Each of the studios or galleries on the route is profiled in their website with contact information, opening hours etc.

3.3.1.3.4 Montagu Historical Walk

The town of Montagu has a walking route which takes visitors past the historical buildings in the town. A pamphlet is available which gives historical information on each building, with a map to guide visitors during their walk.

3.3.1.3.5 Sunshine Route

A new route has recently been established, along similar veins to the Route 62, in that it provides tourists an alternative route to that offered by the national highways. The Sunshine route encourages travelers to turn off at Beaufort West, taking the N12, or from Colsburg, via the N9. This route takes tourists through Outshoorn, and eventually Montagu and Robertson. As such, from Colsburg, it is an additional 169 km than the N1 from Colsburg to Cape Town. This route has significant potential to attract tourists who believe in the journey as part of their holiday experience, rather than just the destination. As the alternative will bring tourists through the LLM, it has potential to positively affect the growth of the local tourism economy. But, as a new route, little has been done to market it, and it is not clear how many tourists currently make use of this driving alternative. A sign post was erected at Beaufort West to direct tourists to the route, but it is reported that this has been blown down.

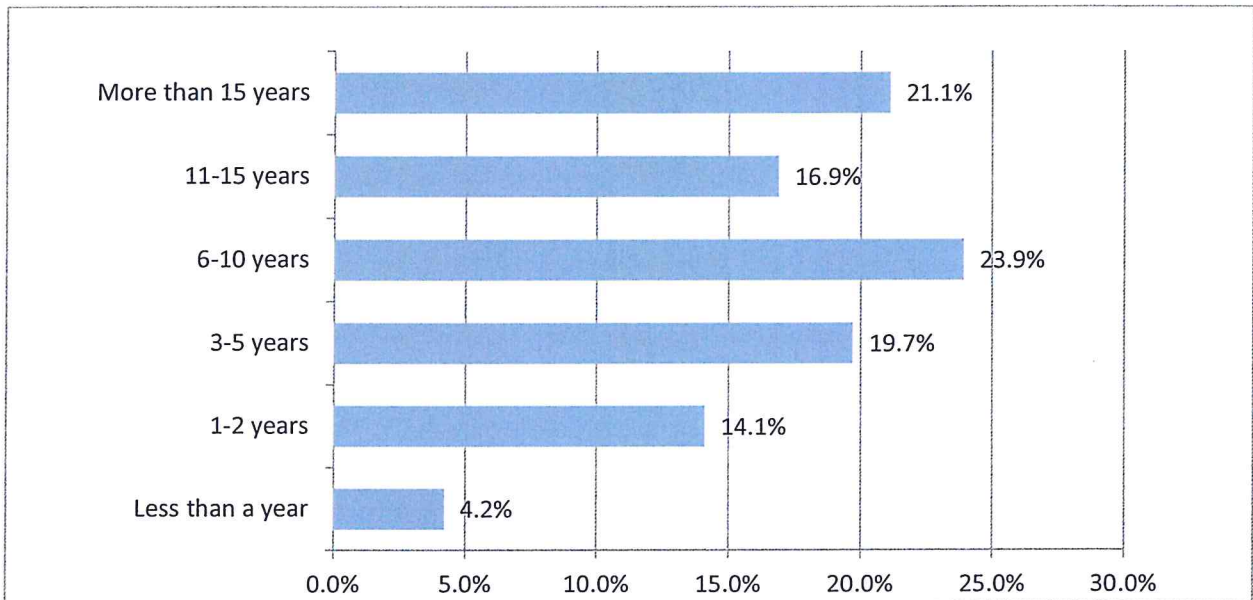
3.3.1.4 The business of tourism in Langeberg

Tourism product owners were asked a number of questions to determine the functioning of the tourism businesses in Langeberg. The responses to these questions are shown below and others have been added to the economic impact and employment section of this report.

3.3.1.4.1 Number of years tourism businesses have been in operation

The following graph shows the number of years a tourism business has been in operation;

Figure 21: No. of years of operation by tourism businesses by percentage



Source: Tourism product owner survey, 2013

It is clear from the above that the tourism industry is well established and stable in Langeberg, with 21% of businesses having been in operation for more than 15 years. Furthermore, just over 60% of tourism businesses have been in operation for more than six years. Only 4.2% of businesses have been in operation for less than a year, with 16.3% of businesses in operation for less than two years. This suggests a number of things;

- That there are barriers for entry of new tourism businesses within Langeberg
- That the tourism market is already saturated with tourism businesses, and the number of tourists coming to Langeberg has not sufficiently increased to make new tourism product development viable.

Implications for tourism strategy: The strategy should ensure that measures are in place to maintain the well-established products, ensuring their continued operations. Furthermore, where global and

national market demands allow, measures should be put in place to create sufficient tourist demand in Langeberg to encourage new tourism product development, and also to create the enabling environment for tourism investment in the municipality.

3.3.2 TOURISM MARKETING AND COMMUNICATION

Marketing of tourism is a critical cornerstone of the functioning of the tourism industry. The purpose of this section of the report is to examine how the tourism offerings are marketed to tourists discussing the marketing undertaken by the municipality, associations and products within the LLM. The section begins with a short overview of the branding of the municipality, and its tourism offerings.

Another component of marketing is the provision of information to tourists who have decided on visiting the area as tourists. This would include how they access up to date information about the accommodation and various attractions within the LLM, before their visit, and once in the area.

3.3.2.1 The brand identity of the Langeberg

One of the major constraints in marketing the municipality as a whole, is that there is no single brand identity. As a relatively new name for a municipality, few people have a geographic or tourism brand identity with the word “Langeberg”. There is however a strong association with the town names “Robertson”, primarily due to the wine industry, “Montagu”, primarily due to the dried fruit industry, and to a lesser extent, “McGregor”, as an art and craft, and wellness destination. To counter this, marketing done by the municipality is under the name Langeberg, with the town names listed below;



As such, the Langeberg is currently being promoted as a municipal, rather than destination brand, which limits its effectiveness. A significant constraint to addressing this is that there is disagreement between role players on what the brand identity for the municipality should be. Options include Langeberg, Route 62, Robertson wine valley etc. Each of these brand identities is not encompassing of all elements and areas within the LLM. For example, Route 62 does not include McGregor, Robertson Wine Valley does not include Montagu etc. The benefits of using existing brand identities such as these however, is that they already have traction and awareness by tourists.

3.3.2.2 Marketing done by the municipality

The Langeberg Municipality undertakes a number of initiatives to market the area as a whole, and the products within the municipality. Specifically, tasks taken around marketing include; updating the tourism website, and developing and distributing brochures and other marketing tools. The municipality

does not currently attend any of the large tourism expos, such as Indaba due to resource constraints, but it is represented by the CWD, who are provided with brochures, and branding in their marketing of the district as a whole. Adverts are placed within magazines that have been identified as being read by the expected target market for tourism in Langeberg, such as the “Great Outdoors Guide”, and “Cape etc”.

Implications for tourism strategy: The marketing plan should look at diversifying the tourism marketing initiatives for the municipality, based on the potential target market, and tools best suited to reaching that target market

One of the major constraints to marketing done by the municipality is that there is no brand identity with the name “Langeberg”. Tourists are more likely to recognise the names “Robertson” or “Montagu” due to the association with the wine (Robertson) and dried fruit industries (Montagu). It is the role of the municipality to market the whole within its boundaries, and this therefore presents a marketing challenge. This challenge is currently addressed by the municipality through adding the names of the towns within Langeberg to all marketing material, however, with the logo and name of the Langeberg. This challenge is faced by many destinations across the world. It is noted that a marketing strategy was developed for the municipality, but this has not yet been implemented.

Furthermore, it is important to note that there is insufficient knowledge about the tourism products available by residents within the LLM. In particular, product owners have poor knowledge of tourism products within other towns, again an indication of a fragmented tourism destination.

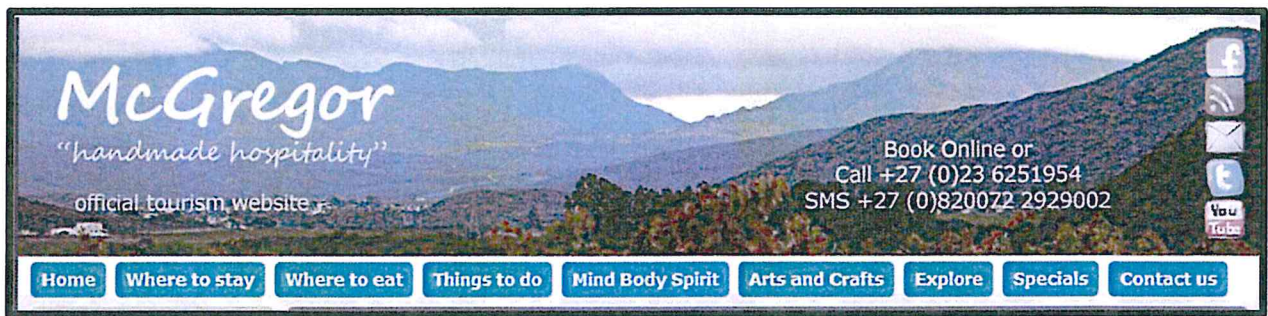
Implications for tourism strategy: The marketing plan needs to make suggestions around marketing and branding the area as a whole, while at the same time making use of the brand identities already recognised by tourists.

3.3.2.3 Marketing by the tourism associations and routes

Each of the towns within the Langeberg Municipality markets itself and the products within the towns through various marketing tools. Likewise, the Robertson Wine Valley markets the wineries within its geographical boundary. It is noted that there is no cohesive marketing between the towns, and each operates essentially as a separate destination. This constraints the tourism economy in that tourist options are limited, resulting in less tourists, and shorter length of stays.

The following section examines each of the associations, and their marketing strategies.

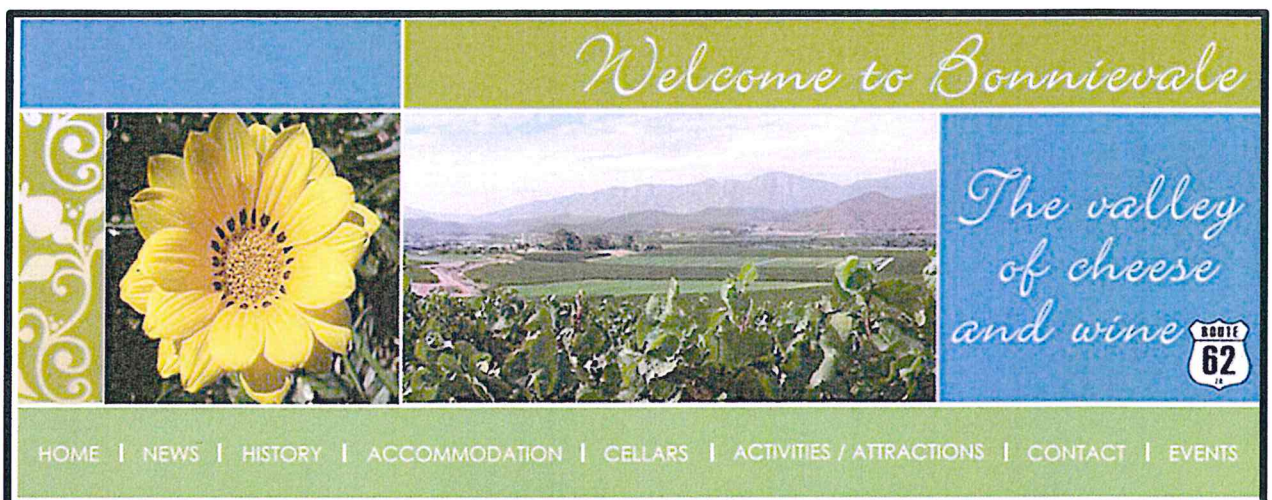
3.3.2.3.1 McGregor



Source: <http://www.tourismmcgregor.co.za/>

The McGregor Tourism Association makes use of social media such as Facebook and Twitter for marketing (<https://www.facebook.com/McGregorTourism>), and uses traditional marketing tools such as brochures and a small amount of paid advertising in newspapers and magazines. They also make use of online web links and partnerships with other organizations such as local tourism offices, Robertson Wine Valley, WESGRO, the CWD municipality. Stalls at local events are also used to market the tourism offerings in the town. (Source: Tourism association questionnaire).

3.3.2.3.2 *Bonnievale*



Source: <http://www.bonnievale.co.za/>

It is noted that the Bonnievale Tourism Association is no longer in existence, but the website has been taken over privately.

3.3.2.3.3 *Robertson*



Source: <http://www.robertsontourism.co.za/>

Robertson tourism make use of Facebook (<https://www.facebook.com/pages/Robertson-Tourism/111879675622126>), their website, maps and brochures to market the town, and the tourism products within the town. They also attend trade shows, and make use of signage as a way to promote the products in the area. The association trains petrol attendants in the town to promote the area, and makes use of festivals and events to provide information that markets the area as a tourism destination. (Source: Tourism association questionnaire).

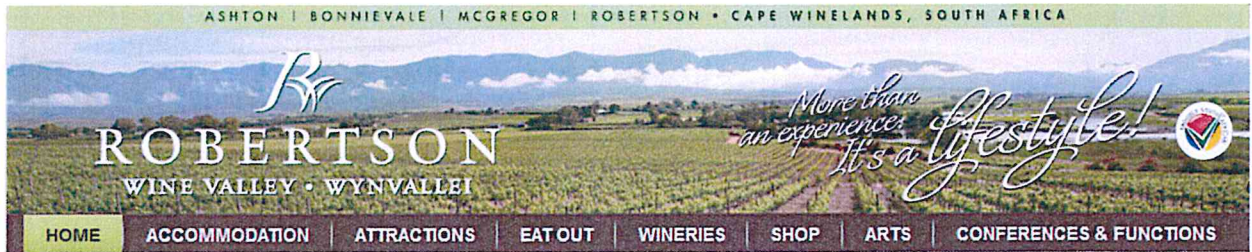
3.3.2.3.4 Montagu - Ashton



Source: <http://www.montagu-ashton.info/>

As well as making use of their own website, the Montagu – Ashton association has collaborations with other local websites, such as www.montagu.org. As with other tourism associations in the area, they make use of social media and have a Facebook page; <https://www.facebook.com/MontaguTourism>. They utilise signage, as well as ensuring their corporate logo and banners are represented at all shows and festivals, and sponsorship opportunities. They make use of more traditional marketing media, such as magazines and newspapers, and more modern marketing media such as video screens in their offices, videos and You Tube clips. The office representatives also attend selected trade and tourism shows such as the Outdoor and Adventure show.

3.3.2.3.5 Robertson Wine Valley



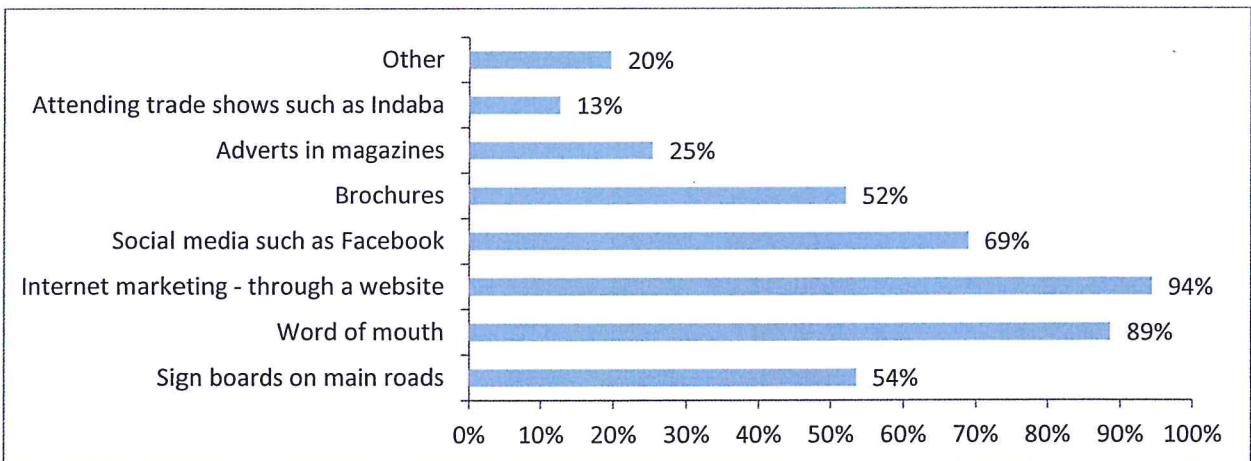
Source: <http://www.robertsonwinevalley.com/>

Robertson Wine Valley makes use of brochures and maps to market the area, and the wine products within the valley. They also make use of social media such as Facebook and Twitter, and communicate through the use of newsletter and flyers. They take out adverts in various, related media publications, and use both signage, and tasting events to market the tourism products in the valley. (Source: Tourism association questionnaire).

3.3.2.4 Marketing by the tourism products

The survey conducted with tourism product owners asked them which marketing tools they make use of for marketing their business. The following graph shows the responses¹⁴.

Figure 22: Marketing tools used by tourism products in Langeberg by tool and percentage use



Source: Tourism product owners survey, 2013

Interestingly, 94% of the products make use of internet marketing to attract tourists to their products. It is not clear if this is a website owned by the product itself, or through websites such as those belonging

¹⁴ Note that product owners were requested to select all marketing tools that they employed, and totals will therefore not equal 100%.

to the relevant tourism association. The next most common marketing method used is “word of mouth”. For word of mouth marketing to be effective, tourists need to have had a good experience at the tourism product and in the area in general. The high reliance on word of mouth of tourism products, suggests high tourist satisfaction during their stay. 69% of tourist attractions make use of social media such as Facebook, suggesting a relatively strong youth market in Langeberg, or other market segments that make use of social media. Just over half of the tourism products use brochures and even less adverts in magazines, traditionally expensive tools to use to market tourism products. In terms of the “other” marketing tools, the following were specified;

Figure 23: Other marketing tools used by product owners

• Tour operators / agents (2 responses)
• 2-3 article are being written every year about us
• SMS
• Tourism Association / local tourism office
• Local tourism office (3 responses)
• Tourism Association / local tourism office
• Tourism accommodation sites (2 responses)
• Own newsletter and industry appropriate networks
• Backpacking guide books
• Wine tastings
• Signs in windows

Source: Tourism product owner survey, 2013

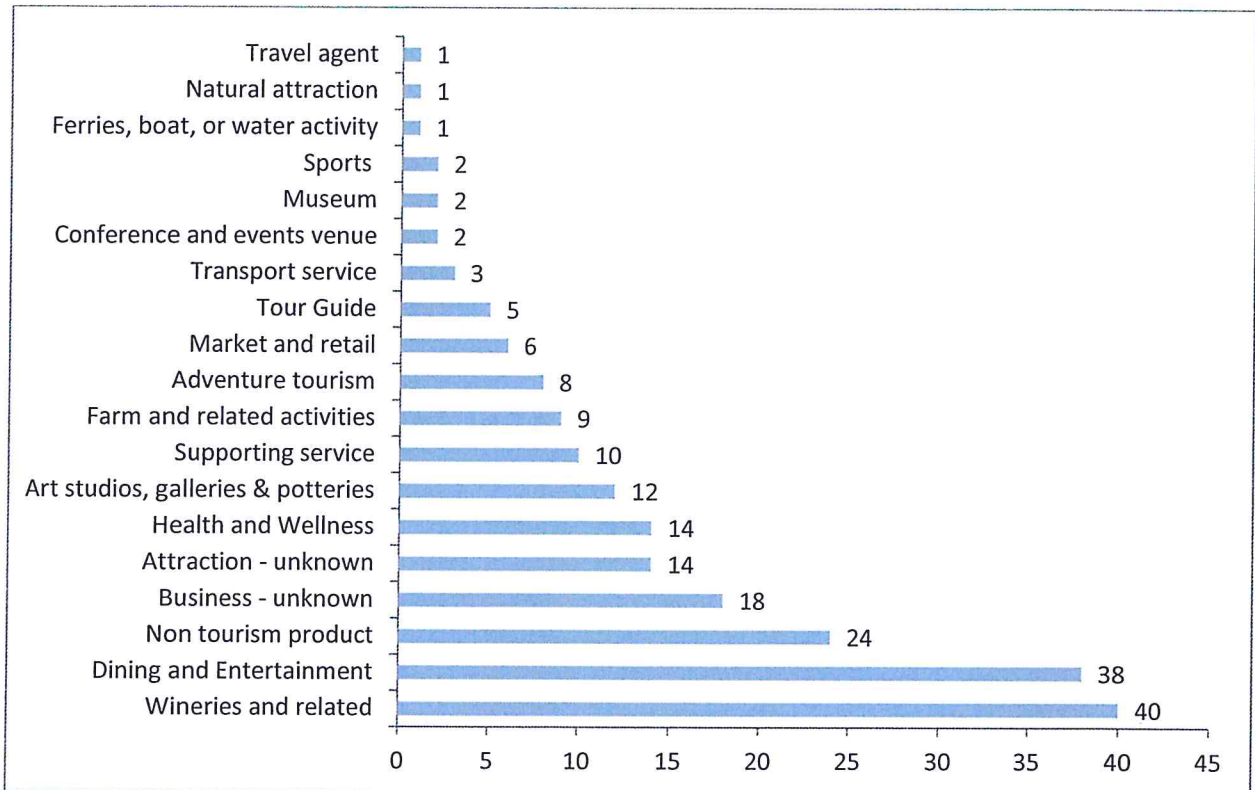
3.3.2.5 Tourism Information and Communication

3.3.2.5.1 A tourism activities and attractions database

The Langeberg Municipality has a large number of tourism products available to both overnight and day visitors. The tourism associations maintain a database of their members who offer tourism attractions and activities. In total, there are 210 products listed on their database. However, some of these products are not strictly tourism related, such as estate agents, and supermarkets. Furthermore, it is expected that some products that where the owners are not members of a tourism association, and they will not form part of the database. It is also important to note that some tourism products are owned by the municipality, such as hiking trails on municipal land. These will also not be on the membership database provided to understand the status of the tourism sector within Langeberg. Another problem with the database is that some products offer multiple activities, such as hiking, a restaurant, and a farm store, for example. The database is limited in that these products cannot be fully unpacked to get a full understanding of the tourism sector. Finally, as with the accommodation products, it has been difficult to determine what kind of attraction some of the products offer to tourists using the database. For these reasons, the product database is limited in giving a full understanding of the nature of tourism product supply within Langeberg. Bearing this limitation in mind, the following table gives a broad understanding of the tourism activities and attractions within Langeberg;

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Figure 24: Tourism attractions and activities in Langeberg - members of a LTA



Source: LTA database

Note that some of the LTA databases merely stipulated that a product was an attraction. An attempt was made to reclassify those to a relevant sub category of attraction. Were it was not possible to determine what the sub category of attraction was; the product was labelled 'Attraction – unknown'. Some products were clearly not a tourism product, such as a fast food store, or an estate agent. These products were recoded as "non-tourism product". Supporting services are for businesses which do not strictly fall into the category of a tourism product, but provide a service to the tourism sector, although not exclusively so. For example, flower arrangements support the events and wedding industry. Some LTA product databases state "business" as a category. It is not clear if these businesses are tourism or not. These products were labelled "business unknown". It is also important to note that this assessment has been done using only the database provided by the LTAs. Non LTA member products will therefore not be included, nor will municipal products such as the hiking trails, particularly around Montagu or Robertson, parks, etc.

Implications for tourism strategy: In order for the municipality and its tourism stakeholders to regularly access the growth or retraction of tourism products in the municipality or to better understand the existing products or product gaps, a comprehensive and regularly updated product database is required. Such a database will require a full audit of products to be done, across all products including LTA members, non-members, and community or municipality owned products.

Langeberg Municipality Tourism Strategy

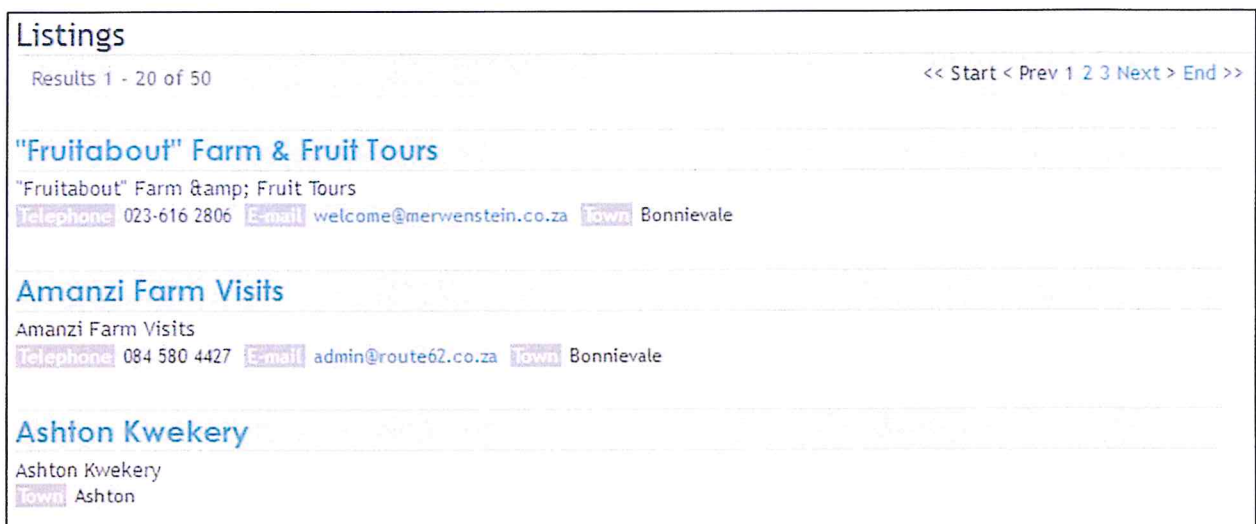
For strategic planning around tourism development in any locality, it is important to have an understanding of the supply of tourism products within that locality for the following reasons;

- A regular review of the number, type and range of products to identify gaps which can be filled by the tourism industry, facilitated by the local government through investment attraction, allocation of land, and other interventions
- To ensure that there is no gap between supply and demand, particularly around accommodation, so that visitors to the LM spend at least one night within the area (Department of Tourism, 2010)
- To give tourists easy access to information on the product offerings within an area.

The Langeberg Municipality website lists the contact details for the tourism offices at Montagu / Ashton, Robertson, McGregor, and Bonnievale. Links are also provided to their respective tourism websites. Listing of products can be accessed for the following categories of products;

- Langeberg Restaurants and Coffee Shops
- Attractions and activities
- Accommodation
- Langeberg Festivals

An example of this is provided below, a screen grab of the 'Attractions and Activities' within Langeberg;



The screenshot displays a web page titled 'Listings' with a navigation bar at the top showing 'Results 1 - 20 of 50' and pagination links '<< Start < Prev 1 2 3 Next > End >>'. The main content area lists three items:

- "Fruitabout" Farm & Fruit Tours**
"Fruitabout" Farm & Fruit Tours
Telephone 023-616 2806 E-mail welcome@merwenstein.co.za Town Bonnievale
- Amanzi Farm Visits**
Amanzi Farm Visits
Telephone 084 580 4427 E-mail admin@route62.co.za Town Bonnievale
- Ashton Kwekery**
Ashton Kwekery
Town Ashton

Source: <http://langeberg.gov.za/index.php/component/mtree/langeberg-tourism/langeberg-attractions-and-activities>

Furthermore, each of the associations provide information to the tourism products of their members on their websites and through their information offices.

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However, as explained above, the current database is provided by the tourism product owners who are members of the relevant tourism associations. The database therefore does not include tourism products owned by the municipality, or those products which could be considered attractions, without ownership, such as a street, or river. Furthermore, information on non-member products of a particular association is not expected to appear on an information database.

Implications for tourism strategy: The tourism strategy needs to look at measures to ensure a easily accessible, comprehensive, and regularly updated product database, both for tourist information, and also to allow for easy analysis of the state of tourism products within the municipality

3.3.2.5.2 Tourism information offices

Each of the towns in the LLM have tourism information offices. These function well: “At the Cape Winelands District Municipality Mayoral Tourism Awards held in September 2013 – Montagu-Ashton Tourism won Runner Up for the Best LTA Office and the McGregor and Robertson Tourism Offices were finalists in the same category.” Some detail of the operations of these offices is provided below;

	Location	Opening hours	Services
Robertson	In the passage of the Mall On Voortrekker on Main	Mon-Fri: 8h00-17h00 Sat: 9am-2pm. Sun: 10am-2pm	Tourism information
McGregor	52 Voortrekker Street, McGregor	Mon-Fri: 09.00-13.00, 14.00-16.30 Saturdays: 09.00-13.00, 14.00-16.00 Sundays: 09.00-13.00 Public Holidays: 09.00-13.00 and 14.00-16.30	Free accommodation inquiries and bookings, Boesmanskloof Hiking Trail permits, 4x4 Groot Toren pass permits, Wedding/Function/Conference group bookings, Restaurant and Winery Tour bookings, Bicycle hire, brochures/flyers/maps on McGregor and the surrounding Langeberg area as well as other towns in the Cape Winelands and toilet facilities.
Montagu-Ashton	Bath Street in Montagu	7 days of the week, from 8:00 – 6:00 and all Public Holidays except Christmas Day and New Year’s Day.	Any tourist enquiries. accommodation bookings as well as an ACTIVITY Booking centre where you can custom make your activities and book and even be collected at the office to embark on your adventure
Robertson Wine Valley	Corner of Voortrekker and Reitz Street, Robertson	Monday – Friday, 08h00-17h00 unless we have a festival, during which it will be longer hours	Do not deal with tourists necessarily, do not handle bookings. But help with wine and other related queries.
Bonnievale	No tourism office		

Source: Tourism office questionnaire

3.3.3 HARD INFRASTRUCTURE AND TRANSPORT SERVICES

Tourism infrastructure refers to the hard infrastructure that tourists use to get to a specific area, in this case the Langeberg Municipality. As such, hard infrastructure usually refers to roads, airports, rail, harbours, border posts, signage, and Information and Communication Technology (ICT). It also includes the transport relevant infrastructure when in an area, and while not strictly infrastructure relevant, this section also discusses transport services. Infrastructure also refers to that related to structures and services provided, largely by the municipality such as hiking trails, pavements etc., which have an impact on tourism in an area. Signage and look and feel of the towns in the Langeberg is also discussed here.

3.3.3.1 Road infrastructure

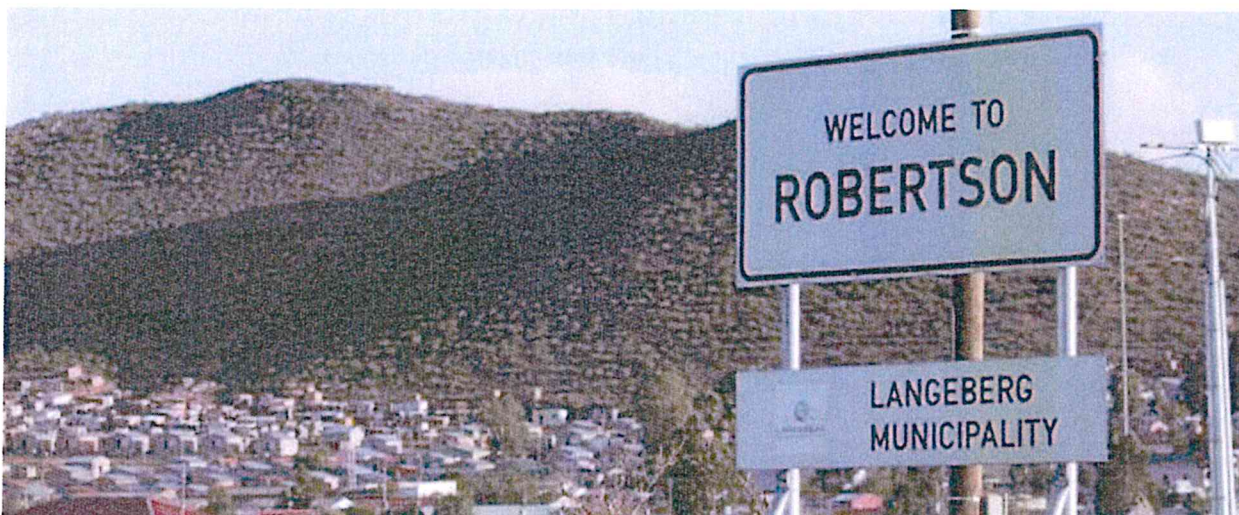
The Langeberg Municipality has good road infrastructure to take tourists to the various destinations within the municipality, but also to bring tourists to the area. The Route 62, and possibly the “sunshine route” is expected to be an important route in this regard. Most roads are tarred, and gravel roads take tourists to some of the more outer lying farms. It was noted that this is not necessarily a problem, as this “adds value to the adventure experience” for tourists. Others tourism stakeholders however feel the condition of these smaller, side roads is of concern for tourism and the agriculture industry.

Concerns were raised about the frequent road works being detrimental to the tourism industry. The main road through Bonnievale was mentioned as being of poor quality, and other stakeholders raised a concern that there is a lack of funds to maintain or upgrade roads in the LLM. Another concern raised was the regular flooding of roads in the Langeberg area, which cuts off towns such as Montagu, but it is noted that this is already receiving attention as part of a bigger road upgrade through Kogmanskloof.

3.3.3.2 Tourism signage

Tourism signage is critical to the development of a tourism sector for a number of reasons; Tourism signage is often perceived to be directional only, in that it takes tourists from one place to another and gives them an easy route from their current destination, to their desired destination. However, tourism signage has another important role in that it can market an area, drawing tourists from their planned route into an area. Good signage in an area, that gives tourists a sense of arrival at that particular place, and attract them to stop and make use of the tourism products on offer, is therefore critical to that particular area’s tourism sector.

There are a number of signs in Langeberg at strategic points saying “Welcome to Langeberg”, with the Langeberg logo. However, as with all marketing of the Langeberg area, tourists have no brand association with the place, Langeberg. This is overcome by the placement of the town name together with the municipal name, as shown in the photo below.



There is currently sufficient signage around the towns in Langeberg, directing tourists towards the various towns and attractions. The only potential improvement identified is around using such signage to create an identity for the LLM, and the various towns. However, a stakeholder who was interviewed noting that another constraint to signage in the municipality is the strict regulations of the “Tourism Signage Strategy”. All road signage applications need to be approved by the province, and this permission is difficult to get. As one tourism stakeholder noted, “signage is a major red tape issue”. The long waiting period for signage approval is reported to be the reason for a lot of “illegal signage, which is bad for the overall aesthetics of the town(s)”.

While road signage is good, signage around hiking trails, cycle trails, walking route etc. is reported to be lacking in the LLM.

3.3.3.3 Look and feel of the towns in Langeberg

The look and feel of an area is often the ambit of the local authority, although the private sector can have an important role in this regard. The towns in Langeberg are generally neat and tidy, and infrastructure is good. Some tourism stakeholders feel that this can be improved. According to one tourism stakeholder;

“Overall look of the streets and towns doesn't really provide “the holiday” look. (I always compare to Franschhoek or Stellenbosch).”

The entrances to the towns are in general, good, with tourists having a sense of arrival. This too, can be improved.

One of the key features of some of the towns in the LLM is the style and history around many of the buildings of the towns. In particular, McGregor and Montagu have a particular architecture, which is of

interest to tourists, but also contributes to the attractiveness of the towns. In order to retain this look and feel, “aesthetics committees” have been established to look at proposed developments and the extent to which they add or take away from the town’s aesthetic attractiveness of the town. This committee is however only an advisory one.

Another initiative to note is a tree planning programme in Bonnievale which is expected to improve the look and feel of this town. This project is known as a “trepreneur” project, taking place in various parts of the country. This project is being spearheaded by DreamSA – whose aims are “beautification of our town(s) as well as education on sustainable gardening practices. The aesthetic appearance of buildings will also come under the spotlight as well as recycling and refuse.”¹⁵

3.3.3.4 Other tourism transport infrastructure

Transport infrastructure is not limited to roads on which tourists drive. Hiking trails, pavements, routes, and other transport relevant services are important in a well-functioning tourism industry. Likewise, other transport means such as rail, planes etc. might be relevant in a tourism area.

Non-motorized transport infrastructure

The infrastructure around non-motorized transport was reported to be poor within the area. In particular it was mentioned that in towns such as Robertson, the pavements were in poor condition, there was congestion, and it was not safe for walking around. Hiking trails in the area were reported to be in poor condition, with little signage, and a safety risk for walkers, hikers and trail runners. Finally it is noted that there are few MTB tracks in and around the area despite the Cape Epic passing through Robertson. As mentioned by a representative from the Robertson Wine Valley “we actually dream about creating a cycling route between farms as well, but haven’t gotten around to doing this”.

Other transport types infrastructure

The only means currently available to reach the LLM is currently by road. There is a train that runs through the area but it currently carries only freight.

Some respondents felt that the development of this rail route into a functioning tourism product would add value to the tourism industry, but no assessments have yet been done on this.

Other transport services

While not strictly infrastructure related, it is important to look at the current status of other transport options in the area. Stakeholders noted that there is no / insufficient public transport in the area. This makes it difficult for tourists who do not have a car, to go from one town to the next, thereby lessening

¹⁵ <http://www.dreamtulbagh.co.za/dream-sa.html>

the tourism impact of their stay. This is also problematic given the fact that many who visit the wine farms, are often over the drink driving limit on their return.

With the adventure tourism products on offer in the LLM, it can be expected that the area is potentially popular with international and local backpackers. However, these tourists often do not have cars and rely on public transport. The Baz Bus is one of the best known transport types for backpacker tourists, but they go only as far as Swellendam (www.bazbus.com). With no linking transport from there to the towns in the LLM, it is unlikely that backpackers will find their way to the LLM.

3.4.1. SOFT INFRASTRUCTURE / HUMAN RESOURCES

Soft infrastructure, as explained in the introduction to this section, concerns tourism skills, tourism awareness, and human resource development, all of which are critical in an effective, local tourism system. These are discussed below.

3.3.3.5 Tourism skills

As essentially a services sector, high quality skills are essential to ensure that a local tourism sector is competitive through ensuring that tourists receive high quality service levels when in the area. It is difficult to quantify the tourism skills within the LLM without conducting a tourism skills audit. This section therefore relies on the input from tourism stakeholders within the municipality. While, some tourism stakeholder report that “local skills are abundant”, other stakeholders feel that a more technical focus is required on hospitality and training in the municipality. One stakeholder explained the problem around skills experienced in the municipality, something experienced in many places in the country;

“Unfortunately a lot of the local staff do not have any formal training and because they work quite long hours and staff numbers are usually limited, they cannot undergo training and they also do not get the chance to experience other products in other areas to benchmark themselves.”

3.3.3.6 Human resource development in the tourism industry

It was reported that the CWD undertakes some training initiatives, around events, computer skills, and customer care. The Graham and Rhona Beck Skills Centre do offer training in tourism and hospitality, but it is unknown how many tourism sector employees have undertaken such training. It was also mentioned that a skills development centre is in existence at McGregor, with this training not limited to the tourism industry. One of the constraints mentioned during the PACA process to skills training, are the stringent regulations around training, and certification for such training.

According to the Montagu-Ashton Tourism association, some training has been done with the CWDM, particularly around computer training, first aid, customer care, event management, introduction to wine etc. Furthermore, in collaboration with one of the LTA offices and private sector; a special skills training

project has been put together between with the local Rotary, training in practical skills such as waitering, serving and being a Tourism Ambassador. This took place in Montagu-Ashton.

In terms of the types of training required, one of the representatives from the LTA explained;

“There is a great need for continuous skills training in tourism offices but more importantly in the various tourism establishments such as waiters, waitresses, restaurant managers, guesthouse managers/assistants, winery employees and tasting-room assistants, petrol station attendants, post office workers, shop assistants, etc... the face of any business is what tourists/visitors to the area see and experience first. It is most often their first impressions and experiences of a town in general – whether at a local coffee shop or refilling their car with fuel that stick with them the most and leave them feeling that they either loved the town and will definitely return in the future or that they will never come back due to bad service, etc... It is vitally important that tourism skills and training is implemented to ensure that all visitors and tourists leave with a positive feeling and experience so that they will return again and spread their wonderful experience by word of mouth.”

A great deal of this can be covered by skills development and training, but some of the above general services, can be improved through better tourism awareness, explained below.

3.3.3.7 Tourism awareness

The awareness of tourism by the residents in an area can contribute greatly to the overall impression that tourists get from that area. Greater awareness of tourism, and basic customer care by all residents who come into contact with tourists, such as petrol attendants, product owners, to waitrons in restaurants, can contribute to a growing tourism industry. It was reported by many product owners that tourism awareness needs to be improved within Langeberg.

In particular, it was noted that while most product owners have a good sense of the tourism sector within the towns, there is little awareness about the products available in neighbouring towns. This prevents effective word of mouth marketing to disperse tourists across the municipality as a whole.

One of the key constraints in tourism development in the South African context, is that local government councilors and officials often have a limited awareness of tourism, resulting in difficulties in getting budget allocation and implementation for tourism sector projects. It was reported that all councilors in the LLM have been sent for tourism training, but not officials.

Implications for tourism strategy: Recommendations need to be made in the tourism strategy around tourism skills development and tourism awareness for tourism employees and owners, or those that

come into contact with tourists, and those that make decisions around the development of tourism in the LLM.

3.3.4 TRANSFORMATION OF THE TOURISM SECTOR IN LANGEBERG

Achieving transformation within the tourism sector is one of the thrusts of the National Tourism Sector Strategies under the theme, sustainability and good governance. While it is not part of the tourism system as explained previously, this is an important component of the tourism and all economic sectors in South Africa, and therefore should make up part of the strategy for the tourism economy in the LLM.

It is the findings of National Tourism Sector strategy that nationally, there is a slow rate of transformation of the tourism industry, with few black entrants on the market, with the ownership of both big and small businesses mostly owned by white persons. While not quantified, this is largely the case in Langeberg. There are a number of “home stay” accommodation facilities within the municipality, but they are not very visible, with little marketing, and few of them appear to belong to the local tourism associations. There are a few black businesses associated with the adventure tourism market, and it is reported that some black crafters provide their work for sale through various channels. It was reported that there is one black owned accommodation establishment in Zolani Township. While on the district level, assistance is given to home stays, there are no local government programs to assist in transformation of the tourism sector.

3.3.5 THE ENABLING ENVIRONMENT FOR TOURISM

One of the key roles for local government with respect to tourism development is one of creating an enabling environment for tourism development to take place. This includes ensuring that institutional capacity exists, the development of tourism forums or associations to market local tourism products, encouraging tourism investment into the area, and encouraging entrepreneur development.

3.3.5.1 The municipality and its role in creating the enabling environment for tourism

3.3.5.1.1 *Institutional arrangements in the municipality for tourism*

The Langeberg Municipalities main tourism function is situated within the Directorate: Strategy and Social Development. The Manager for Social Development is tasked with tourism relevant functions within the municipality. However, it is important to note that tourism is just one of the functions of this official, meaning that there is no dedicated tourism person within the Langeberg municipality.

The municipality is however in the process of appointing a tourism officer to; “Render the tourism function in the Langeberg area; Gathering and processing of tourism statistics; Attendance of Local, District and Provincial Tourism meetings; Marketing of the Langeberg area as a preferred tourist destination by arranging media educational tours and tour operator information sessions; Design, printing and distribution of marketing material; Attendance of Indabas, Expos's and Festivals to market

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the Langeberg area; Arrange training programmes for persons employed in the tourism sector and execute schools tourism awareness programmes; Product development in the previously disadvantaged areas; Doing of general administration” (Human Resource department, by email). This person has at the time of the development of this strategy, not yet been appointed. As such, the municipality is currently limited by human resources in the tourism tasks that they are able to do.

Implications for tourism strategy: Recommendations need to be made in the tourism strategy around the Human Resource needs within the municipality so that it can function optimally in tourism development and marketing.

3.3.5.1.2 Current functions of the municipality in the tourism sector

Given the human resource limitations outlined above, the municipality currently has a limited role in tourism development in Langeberg. The current and recent functions carried out are as follows;

- Facilitate the development of a Tourism Marketing Strategy
- To coordinate tourism in the Langeberg Municipal area.
- To attend Local and District Tourism, as well as the Montagu Mountain Reserve Meetings
- Process all Tourism Road Signage applications
- Facilitate the design, printing and distribution of marketing material
- Promote the Langeberg Municipal area as a preferred destination (Source: <http://langeberg.gov.za/index.php/directory/strategy-and-social-development/special-projects/tourism>)

From discussions with stakeholders in Langeberg, it appears that the primary functions carried out are those around marketing.

The other primary current function of the municipality is the support of tourism relevant events within Langeberg. Sometimes, this is in the form of direct financing, but more often, this is in the form of event support such as cleaning services, traffic management etc. It was suggested by a key stakeholder that an annual events budget was required in the order of R200,000 to assist the events that take place in the municipality to a greater extent.

Implications for tourism strategy: The tourism strategy should look at the role of events within the tourism sector, and suggest measures to further strengthen this sector, if this is determined to be a key tourism driver in Langeberg.

Constitutionally, the municipality is mandated to maintain municipal tourism products and other municipal owned infrastructure within the area under its control. In the case of Langeberg, this would include, amongst other things, hiking trails etc. in the area. A number of product owners raised concern about municipal functioning in this regard;

- “There is not enough support from the municipality, like (with) the hiking trails

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- “The trails are a disgrace, and the parks are shoddy. The management plan for the Montagu and Robertson mountain reserves (should be implemented)”
- (The municipality need to) work closer with the heritage / conservation bodies to maintain our cultural heritage sites and buildings – one of the primary reasons why visitors come to our region”
- “lack (not at all) of maintaining the local mountain reserves and municipal own tourism assets e.g. hiking trails, roads, parks, buildings”

Implications for tourism strategy: The tourism strategy needs to identify the tourism infrastructure, and municipal owned tourism products which are cornerstones to the tourism sector and suggestions should be made about upgrades and / or maintenance thereof. Other tourism relevant municipal services should be identified, and actions recommended around this, identifying potential partners in these processes.

The municipality funds the local tourism associations within Langeberg, to assist them with their mandates of providing tourism information and marketing. This funding is dependent on the size of the tourism industry within each town. The funding is provided through the agreed terms of a MOU with each LTA, summarised as follows;

- That the funding can only be used for operational costs incurred, such as office salaries, stationery, telephone, rental, electricity etc.
- That the LTAs are responsible for operational costs that exceed that provided by the LLM
- That the LTA provides the LLM with bi-annual narrative reports on activities as well as financials

There are concerns by the LTA's that they are not sufficiently funded by the municipality, and that they have to cover significant extra costs through membership fees etc. However, it is important to note that the municipality has significant development challenges, with limited resources, and balancing the funding to what is seen as an industry supporting only one group of people with these other challenges is difficult.

As stated previously, one of the key roles for a local municipality in tourism is to create an enabling environment for the industry to flourish, under the effective ownership of the private sector. Some stakeholders in the LLM believe that this is not happening, and that the LLM is in fact hindering tourism development. This is symptomatic of a poor working relationship between these key tourism stakeholders, and needs to be addressed in the tourism strategy. This is discussed in more details below.

3.3.5.1.3 Licensing of tourism businesses

One of the roles of a local municipality with regards to the tourism sector (as well as other sectors), is to ensure application of by-laws for those businesses. According to the municipality, it is, in terms of the Business Act, 1991 (Act 71 of 1991) the licencing authority and responsible for the issuing of business licences for businesses listed in Schedule 1, namely; any business that provides foodstuffs in the form of

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meals, both for consumption on and off the premises, turkish baths, saunas and other health baths....night clubs / discotheques.....etc. In other words, from the above, the following tourist products would need a business licence;

“All hotels, B&B’s, river cruises / tractor trips and other adventure activities where meals are served, guesthouses / lodges where meals are served, health and wellness centres that provide massages / saunas / health baths, a self-catering establishment that has health baths or more than 3 snooker tables.

Those excluded would include:

Self-catering accommodation, camp sites, 4x4 routes – any product where food or any of the above are not involved.”

Besides the Business licence which is the responsibility of the Municipality, all premises that handle food, meals, preparation, packaging, transport, must have a *Certificate of Acceptability* which is issued by the District Municipality in terms of Regulation 962 – *regulations governing general hygiene requirements for food premises and the transport of food*. In other words a B&B would, for example require both a *business licence* and a *certificate of acceptability*.

It is therefore imperative that all tourism products that require Business Licences and Certificates of Acceptability be forced to do so, in order to maintain an acceptable standard within the tourism sector.

The question of zoning should also be addressed as it is alleged that many tourism products do not comply with the zoning schemes of the applicable towns.

In terms of the enforcement of these regulations, it is not clear to what extent this is done, given the capacity issue within the tourism unit, and the general coordination issues between stakeholders. This tourism strategy needs to address this, as negative experiences by tourists, through poor food hygiene etc., can negatively impact on the future growth of the tourism economy in the LLM.

3.3.5.2 Tourism organisations

There are three Local Tourism Organisations within the LLM that are officially supported by the municipality, the Robertson LTA, the McGregor LTA, and the Montagu-Ashton LTA. There used to be a LTA for Bonnievale, but this is no longer in operation. In addition, the LLM is home to the Robertson Wine Valley, an association of wineries that engages closely with the tourism industry. Although not financially supported by the LLM, they operate in a similar fashion, so are also discussed here. The following table provides an overview of the various LTAs and their operation;

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	Robertson LTA	McGregor LTA	Montagu-Ashton LTA	Robertson Wine Valley
No of years in existence	20	17	More than 20	30
Services to members	Marketing & direct tourists to their establishments.	Allows non McGregor tourism est. and allows free membership to skills development projects, NPOs etc.	Get general services but not placed on maps or website etc. Assist if situation requires.	Difficult to split as they market the area as a whole, for the benefit of tourism and the wineries.
Services to non-members	Bookings, advertising, 6 expo's per year, put them on the map and website.	Display space in tourism office, communication on upcoming events etc., accommodation, restaurant and winery bookings, advertising and marketing in media, create links and partnerships with other tourism organisations, marketing bodies etc., training initiatives etc.	Included on website, maps, brochures, printed material, bookings, displays, create partnerships with other tourism organisations, marketing bodies etc., training and support material. Communication about events, initiatives etc.	Market wines of origin, through festivals, PR functions, wine tasting, general distribution of industry related info. Communication on opportunities. Provide info to consumers through website, social media, newsletters, advertising etc.
Funding sources	LLM, membership fees and commission on bookings, Bus Bookings and various sales.	LLM, membership, accommodation booking commissions, bike rentals and permit sales.	LLM, events and training funding from CWDM, membership fees and commissions.	Members funded. Have sponsorship for some events
Institutional issues	Have a constitution, meet every second month.	Has a constitution and a committee that meets at least 10 times per year.	Have constitution	The organisation is managed by a board/management committee, which are representatives of the members and are voted for at the AGM. The board meets 5-6 times / year and the members 3 times (incl the AGM)
Agreements with members	Sign a Service Level Agreement with members	We do not currently have 'agreements' with our	Each member completes an application form with all	We have a code of conduct that includes how they will

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		members	required documentation. Each new member then get a visit where discussions on delivery and expectations happen.	treat their environment, workers and guests.
Membership criteria & verification	Need to be accredited by CTRU and now WESGRO, or in the process to do so. We do an inspection. Tour operators need PDF licence and Tour guide certificate. Checks the product is registered with the municipality and has the relevant business licenses, or is in the process of doing so.	We currently do not have a verification process. However, for accommodation establishments we do visit the establishment but we do not have any standards which need to be met by the member. Don't check licensing etc. with the municipality	Criteria for becoming a member are based on grading standards. Members go out to check and meet the prospective new member. Paperwork is checked – also double checked with Langeberg Municipality where needed (signage approval etc. and registration where relevant.	No verification, other than the approval by the board. Don't confirm with the municipality.
Dealing with complaints	If it is a complaint re a member, we sort it out by talking to the member and always find a way in the best interest of Robertson.. For non-members we refer the complainant to the municipality or WESGRO	We use our discretion in dealing with them.	We address the complaint directly with the member – we expect a response to ourselves as well as the complainant. We follow up again in a month to check the complaint and the issues has been dealt with and will not come up again.	We will give the member the chance to respond. If we find that the member was indeed wrong, we will take further action as needed.

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In summary, it is clear that while there are differences between the LTAs and RWV in membership, institutional issues etc. that all the associations operate under structured environments, with well-defined functions and polities. Of concern however, is the general lack of cooperation between these LTAs etc. for the growth and marketing of the Langeberg tourism industry as a whole. This is discussed in more detail below.

A particular concern was raised by some tourism stakeholders about the issue of non-membership of the LTAs and potential vested interests and partisanship in operations. This is a problem experienced by many LTAs across the country, especially when tourism officers, or management personnel are also tourism product owners, where elements of self-interest are difficult to prevent. The tourism strategy will need to make recommendations to prevent the use of the tourism office to promote any specific interests and to ensure transparency in operations of the LTAs.

3.3.5.3 Cooperation between tourism stakeholders

Some tourism stakeholders reported a good working relationship with the municipality, while others felt that the municipality needs to do more to support the tourism associations. In terms of cooperation with tourism product owners, this is largely done through the tourism associations, although it was reported that some tourism product owners come directly to the municipality with problems. A number of product owners made comments in the tourism product owner's survey, around the working relationship between themselves and the municipality, as follows;

- "Municipal staff being non informative and unhelpful to potential investors and current business owners"
- "No decent central tourism authority that promotes the area. Lack of input from the municipality"
- "Local Authorities and central Government need to buy into this reality and become much stronger partners (for the benefit of the entire communities they serve)"
- "Report back and liaison with the tourism sector. Discussion groups and planning with regards to goals."

Some of this poor working relationship was attributed to the municipality not having a full understanding of the economic impact of the tourism sector, and therefore being able to provide the resources necessary to maintain and grow this sector "local view that tourism is not of primary importance". Others attributed this to Human Resource shortages within the municipality.

In terms of cooperation between the LTA's within the LLM, it seems that there is cooperation on some levels, but little collaborative marketing, and little collaborative planning around itineraries for tourists, and product linkages etc. As one stakeholder described, "you have five towns all doing their own thing... If they could combine their efforts, it would be that much greater". It was noted during the PACA, that there is also little collaboration between tourism businesses in similar sectors, such as weddings, adventure etc. However, bi-annual forum meetings are held where the LTA's share ideas and build on our channel of communication. As suggested by another stakeholder, "There needs to perhaps be a

platform where members, the tourism office and the municipality can work together, share ideas and benefit together from a mutual partnership.”

In terms of the relationship with the LTA's and other tourism relevant institutions, there appears to be some collaboration between the LLM and the district and the LTA's and the district. There also appears to be some collaboration between the LTA's and WESGRO. Ideally, such collaboration should take place through the LLM. Links between the LTA's and other tourism offices in the district, tour operators, and marketing and media consultancies have also been developed.

Implications for tourism strategy: The tourism strategy needs to look at mechanisms to improve the cooperation and working relationship between municipal staff, LTAs, and product owners to facilitate growth of the tourism sector. In particular, communication and collaborative planning appears to be a particular constraint.

3.4 THE ECONOMIC IMPACT OF TOURISM IN LANGEBERG

The economic impact of tourism is often difficult to quantify due to the fact that tourism products and services essentially belong to a diverse range of economic sectors. For example, accommodation falls under the 'Catering and Accommodation Services' SIC code (SIC 63), while a curio that is made and sold to tourists from a particular area, falls under both 'Manufacturing' (SIC 3) and 'Wholesale and Retail Trade' (SIC 61-62). This is particularly true of Langeberg, where it can be expected that tourists come to the area for the wine route, and purchases of wine. While wine sales might be a large contributor to tourism in the area, the sale of this wine would not be recorded as a 'tourism' economic impact. The 'Catering and Accommodation' economic impact is however indicative and it is useful to unpack what this impact is. Noting that neither accommodation nor catering is necessarily only for tourism, it is assumed that the bulk of spend on this sector is due to the tourism trade.

In 2010¹⁶, the GDP contribution of 'Catering and Accommodation' services in the Langeberg Municipality was R28 million¹⁷, representing a 4.8% growth over a 10 year period. This means that 'Catering and Accommodation' makes up 0.87% share of the total Langeberg LM GDP in 2010. Taking into account the expected impact of tourism on other sectors, this can be expected to be significantly higher. This contribution to GDP of 'Catering and Accommodation' for neighbouring municipalities within the DM in 2010 is as follows;

- Witzenberg LM (R7m)
- Drakenstein (R63m)
- Stellenbosch (R174m)
- Breede Valley (R32m)

¹⁶ Source: Western Cape Provincial Treasury statistics

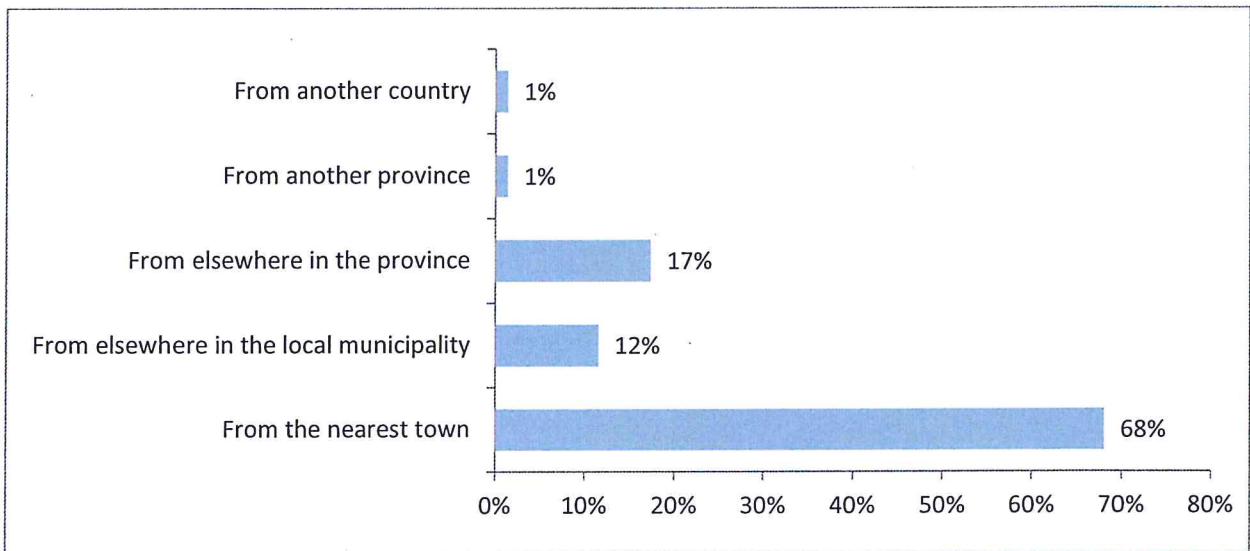
¹⁷ In constant prices, 2005 prices

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It is clear from the above, that with the exception of Witzenberg, the other Local Municipalities within the Cape Winelands District have a significantly higher contribution to their economies through accommodation and catering.

The link between tourism and other economic sectors within a municipality is important in ensuring local spend through economic value chains. The following table looks at how these value chains work within the Langeberg Municipality.

Figure 25: Source of goods and services for tourism products by region and percentage



Source: Product owner survey, 2013

It is clear that the majority (68%) of tourism products in Langeberg source the goods and services necessary for their business operation from within the town in which they are situated. On a municipal level, 80% of goods and services are sourced within Langeberg, meaning that the tourism sector has a very positive impact on the local economy of Langeberg.

3.4.1.1 Spend by tourists in Langeberg

As with tourism numbers to an area, it is also very difficult to calculate what tourists spend when in an area. However, once you are able to estimate the number of tourists it is possible to estimate direct economic impact through one of the following methods;

- Calculating the daily national spend by domestic tourists by the number of domestic tourists in an area in a year, and calculating the estimated number of international tourists in an area in a year by the average daily spend of an international tourist (national government statistics)

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- Calculating the estimated daily spend on accommodating, with estimated daily spend on other activities and attractions by the estimated number of domestic and international tourists in an area in a year.

Respondents indicated in the survey what the average cost per night for accommodation in Langeberg was for both high and low seasons. The following table shows the analysis of the results of this question.

Figure 26: Average cost per person per night in accommodation, high and low seasons

Average cost per person per night - accommodation	Response Average	Response Count
High season	R481,64	44
Low season	R412,61	44

Source: Product owner survey, 2013

Activity and product owners were also asked to estimate the average that tourists spend at tourism their tourism attraction during both the high and low seasons.

Figure 27: Average spend per person at attractions, high and low seasons

Average spend per person at attractions / activities	Response Average	Response Count
High season	R858,50	20
Low season	R321,00	20

Source: Product owner survey, 2013

3.4.1.2 Economic impact of tourism in Langeberg

In calculating the estimated direct economic impact of tourism in Langeberg, the estimated total overnight and day visitors numbers was used, as outlined above. The following assumptions and information was used to calculate this impact;

- It was assumed that the visitor numbers, as calculated elsewhere in this report is correct, based on the responses from tourism product owners, national and provincial tourism statistics etc.
- It was assumed that overnight foreign visitors spend R1080 per day, overnight domestic visitors spend R710 per trip, with a trip lasting 3.6 nights, and that day visitors spend an average of R710 per day (Source: (South African Tourism, 2011)). It is important to note that the average daily spend of both day visitors and overnight visitors is an average calculated across all domestic tourism categories including VFR, which has a significantly lower daily spend than, for example, holiday tourists. Given that most domestic tourists coming to Langeberg are holiday tourists, it can be expected that trip spends are higher than the average used here. The economic impact of the domestic overnight and day visitors must therefore be considered as conservative.

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Figure 28: Estimated annual direct economic impact of tourism in Langeberg, 2013

Economic impact of tourism (direct spend)	
Total number of bed nights to Langeberg per annum	641 339
Estimated foreign visitors bednights in Langeberg (28%)	179 575
Daily spend of foreign overnight visitors (national)	R 1 080,00
Total direct spend of foreign visitors annually in Langeberg	R 193 940 806
Estimated domestic visitors bednights in Langeberg (72%)	461 764
Total number of trips - domestic tourists (3,6 nights per trip)	128 268
Trip spend of domestic visitors (national)	R 710,00
Total trip spend of domestic tourists in Langeberg	R 91 070 087
Total number of day visitors to Langeberg	40 812
Average spend per trip day visitors (national)	710
Direct spend by day visitors per year in Langeberg	R 28 976 846
TOTAL ESTIMATED TOURIST DIRECT SPEND IN LANGEBERG PER ANNUM	R 313 987 739

Source: Shannon Moffett calculations based on estimated tourism numbers and national tourism statistics

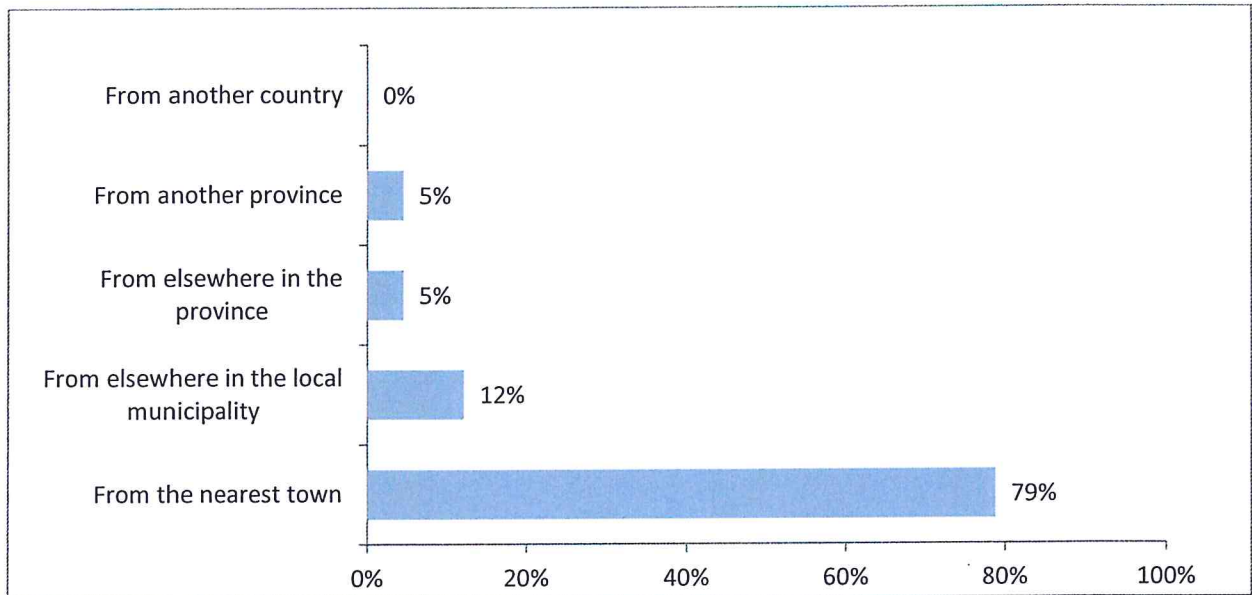
Based on the above, it can be estimated that the tourism industry created a R313.9 million direct spend in the local Langeberg economy each year. As this calculation is only on the direct spend (the monies spent by tourists in the area), it does not include the indirect spend that will be generated by the tourists visiting the area. For example, when an accommodation establishment hosts a guest and provides food for that guest, they need to buy supplies from the local economy, resulting in indirect economic spend in the local economy. Were the indirect spend to be calculated, the economic impact of the tourism sector in Langeberg will be significantly higher.

3.5 EMPLOYMENT IN TOURISM

Respondents in the survey indicated that the vast majority of employees come from within the same town as the tourism product (79%). When examined on a municipal level, 91% of all employees come from within the Langeberg Municipality. This means that the direct and indirect spend of the income generated by employees will remain within the municipality, creating further economic activity within Langeberg.

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Figure 29: Origin of most employees of tourism products in Langeberg by region and percentage



Source: Product owner survey, 2013

Tourism businesses in Langeberg were asked how many full time and part time employees they employed. This question was problematic for products which operated both as a tourism attraction, and for example, a fruit farm, a winery etc. They were asked to specify only those employees who worked in tourism products. Only 70 businesses answered this question. The total permanent employees given by these 70 businesses was 688, meaning an average of 9.8 permanent employees per tourism product. This average is somewhat skewed by some products with large numbers of employees, such as one resort which reported having 120 employees. Product owners stated that they employ 203 temporary employees, an average of 2.9 employees across the 70 businesses who answered these questions. Given that there is a potential skew in the statistics, and that it is unclear how many of the tourism products on the LTA databases are tourism specific products, it is not possible at this point to fully calculate the employment generated by the tourism sector in Langeberg.

Implications for tourism strategy: Measures must be added to the tourism strategy to allow for a full understanding of the employment generated through tourism. Furthermore, these measures should allow for future tracking of tourism sector employment.

4 A SWOT ANALYSIS OF TOURISM IN LANGEBERG

An analysis *vis-à-vis* the strengths, weakness, opportunities and threats, with regards to the tourism industry in the Langeberg Municipality can be found in this section. The strengths and weaknesses are usually influenced by micro-economic considerations, in other words; the strengths and weakness are influenced by the internal aspects of the tourism system and the local economy in a locality (internal

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forces). The opportunities and threats are determined by market and macro-economic forces, for example economics, politics, market forces, etc. (external forces). Opportunities and threats specific to the local tourism system will be indicated in this analysis, as well as broader considerations. This analysis is based on interviews with tourism stakeholders in the area; surveys with tourism product owners in the area and observations during numerous visits, and from the situational analysis as a whole.

Critically, this SWOT analysis is meant to direct and inform the Tourism Strategy for Langeberg which follows in the next section. Interventions that make up the tourism strategy can be **to sustain strengths, reduce weaknesses, grasp opportunities, and negate against threats**, as shown in the following diagram;



This SWOT analysis of the tourism sector in Langeberg is based on a number of key focus areas, which make up the tourism system as explained previously in the Status Quo Analysis.

Tourist product development	
S	- Diverse range of products in LLM can be developed to attract wide target markets - Significant natural resources within the LLM closely linked to tourism activities (mountains, rivers, vegetation, agriculture) - Adventure tourism, wine tourism, health and wellness tourism, art tourism, events tourism well established with products, marketing etc.

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	• 23% of LLM falls under formal protected natural areas (SANBI) and other conservancies • Anchor products in existence, particularly around the wine industry to attract tourists • Large number of events in place, some of them high profile such as Cape Epic MTB race • Excellent tourism routes connecting Langeberg to other areas for tourists and connecting products in the towns and municipality
W	• Insufficient child friendly products in Langeberg • Insufficient backpacker or similar products to attract the adventure, youth market • Insufficient public or private transport available to assist tourists getting from one town in Langeberg to others, or between products. • Lack of linkages between products of similar nature, such as hiking trails, MTB tracks etc. • Insufficient leveraging off high profile events such as Cape Epic • Current neglect of key natural attractions in the LLM • Insufficient linkages between products of similar nature (adventure, natural, conference, weddings etc) • Many products closed on Sunday, a potential peak time for tourist visits • Few accommodation products (58%) not graded making quality assurance difficult for tourists. • Many tourism products closed on Sundays • Shortage of cultural products in LLM
O	• Development, linking of natural and related tourism products through activities related to these • Create more and link hiking trails in LLM to grow areas attractiveness for hikers, trail runners etc. • Link and create more MTB trails in more rural areas • Create more products, infrastructure related to attracting the youth market • Potential to focus on natural and adventure product development, creating linkages, marketing as a natural destination • More events to create awareness, word of mouth, attract tourists • Opportunity to link with CWD "Freedom routes" • Make use of Route 62 and Sunshine Route to encourage tourists to take alternative routes through LLM • Possible creation of more routes to link products of similar nature • Opportunity for more sports event tourism related to current sports activities • Create more products at key attractions, such as MTB at wine farms, craft shopping at restaurants etc.
T	• Poor infrastructure related to nature based products • Tourism growth could lead to more commercialisation of the tourism industry, destroying the authentic feel • Insufficient attention to the natural protected areas could result in loss of biodiversity, damaging the tourism industry, and other negative implications.

Tourism marketing and communication	
S	• Significant brand identity with the names of some of the towns in Langeberg, in particular, Robertson and Montagu, and to a lesser extent, McGregor. • Products and associations, mostly make use of diverse marketing tools

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	• Close proximity to Cape Town makes it easy to market as a weekend get away • Good weather all year round, can be used as a significant marketing tool • Currently 74% domestic visitors, with potential to grow this market • Well operating tourism information offices
W	• Very little brand association with the term "Langeberg" • No single brand identity, logo, look and feel etc prevents marketing as a destination rather than individual towns • No cohesive marketing between towns in LLM • Marketing not currently targeted to potential target markets • No complete, comprehensive, up to date tourism product database available for information purposes • Currently municipal or not privately owned products, and non-members of LTAs not on product database • Can provide differentiated packaging of tourism products for marketing • No comprehensive calendar of events, that is widely marketed • Few tourism expos etc. attended • Only 28% of visitors are international • No comprehensive map of the area, and attractions available • No tourism information office in Bonnievale
O	• Improved marketing to attract weekend getaway market from Cape Town and surrounds • Potential to link products and marketing thereof, to market as a diverse destination • Shared brand building for both the towns and the Langeberg Municipality • Opportunity to create LLM brand identity, with towns representing sub brands • Collaborative marketing can reduce costs of individual towns / LTAs and products • Targeted marketing to increase domestic tourism and attract more international tourists to the area • Attract more non WC tourist through marketing of alternative routes from inland areas, Garden Route • Improved, targeted marketing to address seasonality of tourism in LLM • Comprehensive map showing all attractions along themes to market the area to target markets
T	• Towns such as Stellenbosch, Paarl with similar product offering better known, and close to CT

Hard infrastructure and transport services	
S	• Excellent road infrastructure to reach the LLM, and many products within • Large amount of tourism signage in LLM • Look and feel in towns good, adds to the attractions to tourists
W	• Frequent road works not good for tourism • Little sense of arrival through signage, displays when entering the LLM / towns • Poor maintenance of infrastructure related to natural attractions such as hiking trails, such as safe paths, signage etc. • Little public transport available, particularly between the towns • No Bazz Bus link to LLM reduces the backpacker and youth market access to the town • Limited branding on tourism signage • Non-motorised transport poorly developed

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O	- Proposed toll roads on N1 has potential to drive tourists to make use of alternative route through LLM - CWD route 62 project expected to improve signage, upgrade infrastructure related to lay by between Worcester and Robertson - Make use of local taxi industry to provide tourist services especially on weekends - Improve entrances to towns to create sense of arrival for tourists - Opportunities to increase MTB and road cycling routes, hiking routes, trail running and walking routes etc. in area - Create link with Baz Bus to LLM to attract adventure, youth, backpacker tourists
T	- Lack of attention to architectural heritage in LLM could threaten these buildings, and the tourism industry associated with this. - Strict provincial regulations on signage - No public transport from wine farms could lead to drink and drive related accidents - Frequent flooding harms the tourism industry - Poor infrastructure such as pavements create bad impression for tourists

Human resources and soft infrastructure	
S	- Current CWD school tourism awareness programme in place. - Some LTAs CWD etc have implemented skills development initiatives - Graham Beck skills training centre situated in LLM
W	- Regulations around accreditation for skills development are a constraint to passing on these skills, especially in a more formal way, where some kind of achievement certificate would be useful to the trainees. - No skills audit in tourism industry done, so skills gaps are unclear - Poor awareness of tourism by tourism owners in other towns, by residents, and to some degree, municipal officials / councillors.
O	- Tourism awareness campaign for all residents will improve service levels, transformation, marketing - More formal training in tourism skills opportunities (and needs)
T	Poor service from any resident who comes into contact with tourists, can cause damage to tourism industry

Transformation of the tourism sector	
S	Some black owned tourism products already developed despite lack of support
W	- Regulations around accreditation for skills development are a constraint to passing on these skills, especially in a more formal way, where some kind of achievement certificate would be useful to the trainees. - No assessment done on transformation, so no opportunities or gaps identified - Home stays not marketed by the LLM or LTAs - Little knowledge and understanding of tourism sector, and client needs and preferences
O	- CWD running programmes around empowerment, specifically for home stays - Link in with CWD arts and craft route

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	• Create a local arts and craft route in township areas linking local artisans with tourism industry
T	• Continued perception of tourism as a white industry could result in reduced municipal support

The enabling environment	
S	• Well established and supported tourism associations • LTAs for the most part, engage with quality control in respect of their members
W	• Performance of the tourism industry not currently tracked • No comprehensive tourism product database (members, and non-members, municipal products etc) • Generally poor relationship between associations and their members, and the municipality • Poor cooperation and planning between all stakeholders in tourism • Limited funding available for tourism sector • Low capacity in the municipality to drive tourism growth • Municipal engagement in the tourism sector limited to marketing, and some event planning • No tourism association currently in Bonnievale • Low institutional capacity in the LLM due to unfilled tourism position. • Limited funds available from LLM to tourism sector given other developmental needs in municipality • Little enforcement of bylaws etc on tourism industry • Not all tourism products registered / members, no avenue for tourist complains, and quality control
O	• Create a cohesive, collaborative institution for marketing, collaborative planning, and communication
T	• Municipal need to balance development objectives could threaten support to tourism industry • Threats of self interest in management of tourism offices a potential threat.

5 LANGEBERG TOURISM STRATEGY

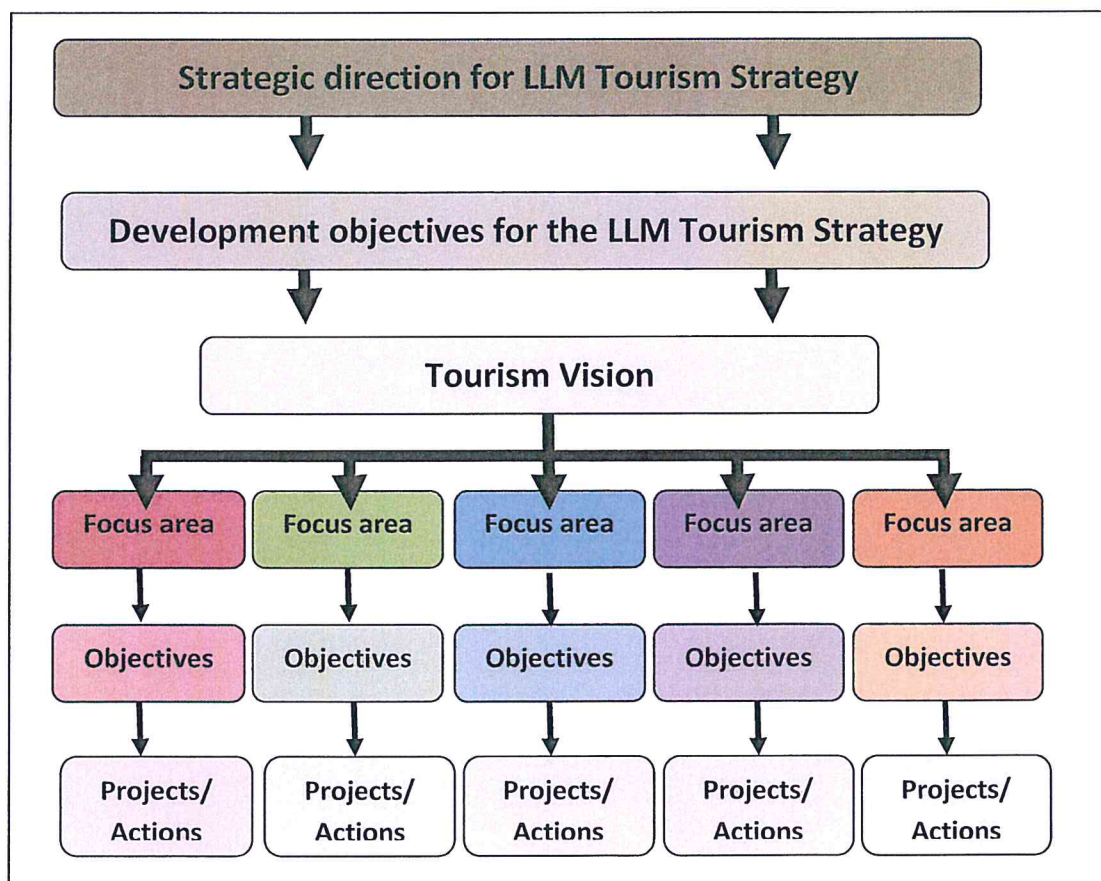
This section presents the tourism strategy for the Langeberg Local Municipality.

5.1 INTRODUCTION TO THE LANGEBERG TOURISM STRATEGY

The status quo examined the current situation of tourism in the Langeberg Local Municipality, which was then analysed through the SWOT analysis. These sections, and the context analysis, set up the broad framework for the development of this tourism strategy. The basis for this strategy is to present action and projects to grasp tourism opportunities, reduce weaknesses, grasp opportunities, and mitigate against threats in the tourism industry. These recommendations are based on the analysis of the situational analysis, and through input received during the consultation process.

The section begins with an analysis of the broad strategic direction the tourism sector in Langeberg should take, based on the product strengths and unique selling points in the LLM, the potential target markets based on these strengths, and proposed strategic direction and development objectives for the industry in Langeberg.

The subsequent section of the report presents the vision for tourism in the LLM, which should direct all tourism interventions in the municipality. As explained in the Status Quo Analysis, the tourism sector operates best as a system, where all components of the system are functioning optimally. The strategy is therefore based on these focus areas, with each focus area having a number of objectives, projects to meet this objectives, and necessary actions to implement these projects. This is explained in the following diagram;



5.2 STRATEGIC DIRECTION

The core objective of most tourism plans or strategies is to increase the number of tourists coming to the geographic area covered by the plan or strategy. Through increased tourist demand, greater income and job creation takes place, and the local economy is grown. In order to bring more tourists to a given area, the products available to tourists need to meet a determined target market, and the demands of that market. Furthermore, supporting interventions need to be in place to enable the access of tourists to that particular product, such as transport infrastructure, marketing etc. The start point for any strategy or plan is therefore to determine the strategic direction that tourism should go in, based on potential demand, and the products that can be developed or improved to meet that demand, and based on the Unique Selling Points (USPs) that that particular area has. This section sets out the strategic direction for tourism within the LLM, derived from an analysis of the situational analysis, policies, strategic guidelines and discussion with key stakeholders concerned with tourism development. In order to assess the best strategic direction to grow tourism in the LLM, the following issues are examined;

- Product strengths and Unique Selling Points (USP)
- Market segmentation and target markets
- Proposed strategic direction

5.2.1 PRODUCT STRENGTH AND UNIQUE SELLING POINTS (USP)

The strategic direction that the LLM should follow needs to be based in part on the products strengths of the area, and the Unique Selling Points (USP) that the area has.

Definition: A unique selling point is a factor or factors that differentiate a tourism product from competing tourism products. It is these factors that make the tourism product unique and thus encourage consumers to consume that tourism product rather than the competitions product.

The status quo analysis shows that the LLM has a number of current products, which are in demand by tourists. In terms of USPs, it is clear that the municipality and its product offerings are not necessarily unique, in that there are other nearby towns, such as Stellenbosch, or Paarl, which offer similar products. It is suggested however, that the combination of available tourism products, and other locational, geographic, historical, heritage etc. advantages **together**, make the destination as a whole unique, when compared to competing destinations. It is this combination of products, which potentially make the area a unique destination in the region, and the strategic direction must therefore be focussed on creating partnerships, links, and for cohesive marketing in the area. These selling points, and the implications for the tourism strategy are explored in the following table, and the extent to which this is unique in the region, is subsequently discussed.

Key selling points	Implications for tourism strategy
A well-known and well visited	Wine should continue to be the anchor of the tourism industry, supported by

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wine industry	wide ranging initiatives and products linking “wine visitors” to other activities when in the LLM
Extensive natural attractions, mountains, rivers etc.	Product and infrastructure development needs to focus on using these resources for product development related to nature, adventure, sports, etc.
Health and wellness attributes	Unique in the region – strategy needs to focus on more development, investment, better marketing, linked with other similar and dissimilar products
Close proximity to Cape Town, with good linking infrastructure	Tourism strategy should focus on product development and marketing to the “weekend getaway” leisure market, and for meetings, small conferences, and educational tours – particularly to Cape Town residents. Transport infrastructure development should be supportive of this.
Good alternative route between major tourism destinations	Tourism strategy, in particular, marketing strategy should focus on ‘selling’ the LLM as an alternative stop over destination between Cape Town and other destinations etc.
4 major towns in close proximity, 3 of which currently have good tourism brand association	Focus needs to be on creating links between these towns, making use of individual brand identities to create destination as a whole, giving tourists a destination to visit, rather than a town.
Good ‘all year round’ climate	Tourism development needs to capitalise on this, attracting tourists in both traditional low and high seasons.
Intimacy, relatively un-commercialised nature, and friendliness of the available products	Can be used to grow the tourism sector, as intimacy of products is unique when compared to more developed tourism industries in other towns in the WC. Care must however be taken that growth of the sector will not result in a loss of this selling point.

It is clear that there are many diverse products, and potential tourism products within the LLM. Individually, they are not unique. For example, the wine industry has a strong competitor in places such as Stellenbosch, adventure and nature tourism have to compete with Cape Town, and many other towns within the Western Cape, etc. Likewise, the events, business and wedding tourism sectors have strong competitors elsewhere. It can however be argued that the Health and Wellness products within the area are unique to the Western Cape. However, no other destination in the Western Cape and beyond, can boast such as diverse offering of strong tourism products, catering to a wide variety of tourist tastes, and target markets. It is this uniqueness of the destination as a whole which must be emphasised in this strategy, and future product development and marketing initiatives. Opportunities to grow the tourism economy will be grounded in linkages related to the LLM as a complete destination, and must be further exploited.

5.2.2 MARKET SEGMENTATION AND TARGET MARKETS

Product development within the Langeberg cannot be determined alone by the unique selling points and product strengths of the area, and the opportunities that this offers. The strategic direction needs to also be determined by the potential market who would be users of the products and services within the municipality. It is therefore important to determine where the LLM should position itself in terms target markets. This section therefore seeks to answer the questions; which type of tourists currently go to the area, and what kind of tourists can be brought to the area through specific strategic interventions facilitated through the implementation of the tourism strategy?

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A summary of the current market from the status quo analysis is provided below;

- The total number of overnight visitors to Langeberg per year is estimated to be 194,345
- The total number of day visitors to Langeberg per year is estimated to be 40,812
- 74% of visitors are domestic tourists
- 73% of domestic visitors to the LLM are estimated to be from the WC
- 81% of international tourists to the LLM are from Europe, with 10% from Northern America, with the UK, Germany and Netherlands the main source market of these tourists
- The vast majority of tourists visit the LLM for holiday or leisure purposes, followed by attending an event, wedding etc.

The table below has been developed to assess potential tourism markets for the LLM based on the USPs that the area has and the potential products that can be developed, as outlined above. The target markets have been assessed based on international and domestic markets, and the market categories used by SA Tourism (leisure, VFR, business etc.), as well as a lifestyle categorisation.

Key selling points	Potential target markets
A well-known and well visited wine industry	Domestic and international, with all age groups – particularly, middle and older age groups. Primarily for holiday and leisure tourists, educational, and special interest groups for primary activities, but as secondary activities for VFR, business, transit tourists. In particular, shopping tourists. Specific focus on special interest groups interested in wine tourism.
Extensive natural attractions, mountains, rivers etc.	International and domestic. Particularly youth markets for sport and adventure type tourism activities. All age markets have potential for different type of activities related to natural attractions. Potential educational component related mostly to learners and higher education students, with focus on environmental education. Holiday and leisure and education tourists as a primary activity, but also special interest tourists (birding, geology, rock climbing, etc. tourists. Potential for secondary activities related to business, VFR, and transit tourists.
Health and wellness	Primarily domestic tourists, but potential for international tourists. Expected to be in demand for middle and older aged, health and wellness tourists. Primary activity for these tourists, but potential activity for all other tourist markets.
Close proximity to Cape Town, with good linking infrastructure	All potential markets. Better public transport infrastructure will be required for non-self-drive target markets.
Good alternative route between major tourism destinations	All potential markets – particularly those travelling from CT to elsewhere in province or country. Better public transport infrastructure will be required for non-self-drive target markets. In particular, transit market.
4 major towns in close proximity, 3 of which currently have good tourism brand association	All target markets currently visiting only one or two towns in Langeberg. Potential to expand to other target markets with greater cohesion between towns, marketing municipality as a destination, not individual towns.
Good 'all year round' climate	All Cape Town, Western Cape domestic tourists – including holiday and leisure, VFR, special interest groups, etc.
Intimacy, relatively un-commercialised nature, and friendliness of the available products	All target markets.

5.2.3 PROPOSED STRATEGIC DIRECTION

Based on the above analysis, the recommended strategic direction for tourism in the LLM should be based on retaining and capturing the following markets;

- Domestic and international holiday and leisure tourism markets, particularly the Cape Town and Western Cape markets (including residents and visitors to Cape Town)
- Special interest tourism markets, both international and domestic including health and wellness tourists, wine tourism markets, groups interested in natural heritage attractions (avi-tourism etc.), tourists seeking arts and culture
- Educational tourism markets – particularly from within the province
- Increase the youth tourism market for adventure and sports based activities, and through education
- Business tourism market, particularly around events, weddings, team building, out of office meetings etc.
- Weekend getaway markets – particularly for Cape Town and surrounding areas
- Transit tourists – en route to or from other tourism areas, in particular, Cape Town

A particular emphasis in terms of the strategic direction for tourism in the LLM needs to be around the creation and marketing of a tourism destination rather than the current focus on separate towns and their tourism offerings. This needs to be done through product linkages, cohesive marketing and branding, through awareness of products in neighbouring towns, and communication and cooperation between towns, the municipality and product owners.

This strategic direction presents a number of broad development objectives for the LLM's tourism sector. These are discussed in the following section.

5.2.4 BROAD OBJECTIVES FOR THE LANGEBERG MUNICIPALITY TOURISM STRATEGY

Specific objectives will be provided for each of the focus areas of the tourism strategy, and these are discussed later in this document. However, it is also important to note that there are a number of broad objectives that should direct the strategy as a whole. These objectives describe the envisaged situation related to tourism in the LLM and serve as a reference point for the strategy. These objectives have been selected based on the situational analysis and through their ability to both fulfil the strategic direction to grow tourism in the LLM. These are as follows;

- To grow the number of visitors to the LLM, particularly from the identified target markets
- To increase the length of stay of visitors, through the availability and marketing of a diverse range of tourism products, across the municipality as a whole
- To increase employment in the tourism sector, and the sectors contribution to the local economy
- Equitable business development, including previously disadvantaged groups

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- To ensure a cohesive tourism sector, across all towns in the Langeberg, where stakeholders work in cooperation with one another
- To ensure that products are available and accessible, with information on them readily available, based on the USPs of the LLM, and that are in demand by identified target markets
- To ensure that an enabling environment for the growth of the tourism economy is in place, involving all stakeholders, fulfilling their particular roles and responsibilities.
- To ensure that infrastructure and human resources are in place to ensure growth of the local tourism economy

5.3 VISION FOR THE LANGEBERG TOURISM STRATEGY

A vision shows the desired image for the tourism future for the LLM. As such, it directs the tourism sector to “where we want it to go”. Therefore, the development of a vision is critical to provide direction to the tourism strategy, and subsequent actions for tourism development.

The vision for the Langeberg Local Municipality as a whole is as follows;

“To create a stable living environment and sustainable living conditions for all citizens”

The vision for economic development in the LLM is as follows;¹⁸

“To foster long term economic growth and employment to develop the Langeberg Local Municipality as home to a thriving economy for the benefit of all residents.”

The Mission Statement for LED in the Langeberg Municipality is as follows;

“To be a municipality whose economy is based on an integration of key economic sectors, local resources and geographic areas, providing business opportunities, an enabling business environment and employment to all residents, and where all stakeholders collaborate in achieving the municipality’s potential.”

It is important to note that tourism is considered to be one of the economic drivers in the LLM as highlighted in the LED strategy, as estimated in the status quo analysis economic impact assessment of the sector. The proposed vision for the LLM tourism strategy should, where possible, align with the LED

¹⁸ Source: 2013 LLM LED strategy

vision and mission. The proposed tourism development vision for the LLM was developed through the outcomes of the primary research process, situational analysis and the stakeholder engagement processes. The proposed vision is thus as follows;

Proposed vision 1:

Grow the Langeberg Local Municipality as a unified tourism destination with a diverse range of connected tourism offerings, supported by all stakeholders and necessary infrastructure, with an increasing contribution to the local economy.

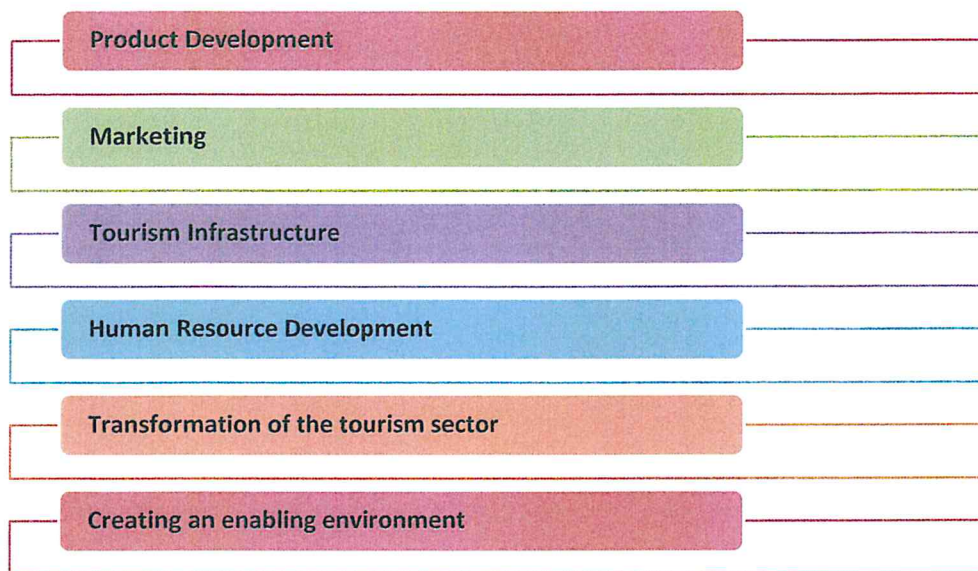
Proposed vision 2:

To position the Langeberg Local Municipality as a sought after, all year round, cohesive tourism destination supported by all stakeholders, making use of the natural and historical heritage offering an authentic experience to diverse tourism markets, to grow the tourism economy, benefitting all residents.

5.4 FOCUS AREAS FOR THE LANGEBERG TOURISM STRATEGY

The focus areas for the tourism strategy for the LLM have been developed based on a systems approach to tourism development. As explained in Section 3.4 of the Situational Analysis of this study, it is imperative that tourism operates as a system in order to function to its capacity, where all parts of the system need to be in place for the sector to function properly. For example; tourism product development will not result in increased tourism demand unless infrastructure is in place to get tourists to the product, and unless the product is properly marketed. This tourism plan therefore needs to address all components of the tourism system to ensure that the vision outlined above for tourism in the LLM can be achieved. This RTSP plan is therefore based on these various focus areas, which are used as reference points to identify specific projects and actions for implementation, as shown in the following diagram;

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FOCUS AREA 1: TOURISM PRODUCT DEVELOPMENT

Tourism is driven by attractions and attractions are demand generators. It is thus important to develop tourism attractions and facilities to draw more to visitors to the area, different tourism markets, and encourage longer stays of these tourists. Tourism product development therefore seeks to grow the tourism products within the LLM as a whole, through the facilitation and coordination of product development that will reflect the diversity of the municipality's tourism offerings. Furthermore, it aims to exploit areas in tourism in which the Langeberg has a comparative advantage.

The Status Quo analysis found that the LLM has a wide range of tourism products, which are dispersed across the whole municipality. The current anchor of the tourism industry is the wine related products, but adventure and nature tourism, health and wellness, sports and events, arts and crafts, and historical heritage are also well visited tourism products in the municipality. There is a diverse range of accommodation to support the tourism industry.

Many of the visitors are day visitors, and 'weekend getaway' tourists, particularly from the Western Cape and Cape Town, are an important market segment in the LLM. One of the key constraints identified, is the silo approach to tourism within the LLM, with products and towns not cooperating to create a destination, with interlinked products. One of the strategic objectives of this plan is to address this, through objectives and projects aimed at linking products to create the Langeberg as cohesive destination. Objectives and projects related to the product development focus group are therefore directed towards achieving this strategic objective.

It is understood that product development is not a function of the Municipality, but rather the private sector. The exception to this is products owned or managed by the municipality, such as amenities, conservation areas etc. However, by identifying product gaps for the tourist sector, the municipality can create an environment conducive to private investment in tourism products. Furthermore, interventions

can be made to better link private and municipal owned or managed products to encourage such investment, improve the marketing of the destination, and increase visitor numbers and / or length of stay.

Objective 1: Create & link products through routes to aid destination development

As explained in the status quo analysis, the LLM is largely made up of products and towns that operate in silos, presenting to tourists mini-destinations, rather than presenting the LLM as a cohesive destination. There is, with few exceptions (particularly in the wine industry), few linkages between products of similar nature across the different areas in the LLM. This constrains the marketing of the LLM as a destination, and limits tourism growth. This objective is directed towards linking products and potential products in which the area has a competitive advantage to achieve this objective. Each of these routes need to have relevant infrastructure in place, including signage, and need to be on the LLM route map, as per the Marketing focus group. It is suggested that the following routes are developed;

- Trail route: Hiking, cycling, walking
- Arts and craft route
- Culture and heritage route
- Adventure route
- Wine route
- Health and wellness route
- Farm route

The details of this are explained in the projects below;

Project 1.1: Create and link hiking, cycling, and walking trails as routes

The LLM is endowed with many natural attractions, some of which currently have hiking, MTB, walking and trail running routes. These are all growing attractions for tourists. While some of the paths / trails etc. are not town or geographic area specific, some are. A tourist does not currently have an opportunity to identify routes across the area as a whole, and therefore is not able to identify more long term hikes or trails to embark on. It is therefore essential to take advantage of this comparative advantage in natural scenery and attract more hikers and mountain bikers to the LLM. This limits both the attractiveness of the area, and the length of stay of tourists. There are significant gaps in both products related to these activities, and the linking of them. The municipality does not currently take full advantage of the marketing around the Cape Epic which takes place annually, primarily through the Robertson area to attract mountain bikers to the area when the Epic is not taking place. Furthermore, in many places in the world, bike tours to wineries are offered, but not currently within the LLM. Significant potential exists to explore this as a product within the LLM.

Some suggestions around new trails and the linking thereof are as follows;

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- Year round Cape Epic MTB routes
- MTB routes through the natural attractions, and possibly wine farms (see the following example: <http://karkloofmtbtrails.co.za>)
- Hiking and trail running through municipal and private natural areas, and private farms
- Walking trails through municipal and private natural areas, and private farms
- Cycling (road and MTB) routes through wine farms, linked with wine tasting etc. (see the following examples; <http://www.bikeandsaddle.com/trips/view/29>, <http://www.winelands.co.za/wine-tours/winelands-tour-on-bicycles>, <http://www.newzealand.com/int/article/cycle-the-classic-new-zealand-wine-trail/>)

It is important to provide well marked paths as well as develop new paths through the more natural parts of the LLM. The development of hiking and mountain biking trails are also sources of employment because labour is needed to develop and maintain the trails – this allows for the involvement of the expanded public works programme (EPWP). Furthermore, trail guides might be required, providing job opportunities in the LLM. In the case of private land, agreements will need to be reached with land owners. All developed routes should be added to the route map, as per the marketing focus group.

Project 1.2 Create inter-linked art and craft routes

While there is an art route within McGregor, there are a number of art and craft outlets within the other towns that should be linked through a well-marked and marketed route, to meet the needs of tourists who are interested in art and crafts. Furthermore, it was reported that there are a number of artists within township areas of the LLM, who have few opportunities to market their work. It is recommended that these emerging art and craft groups or individuals be developed and included in an art and craft route. As with all routes suggested under this objective, this route should be included in the route map, as per the marketing focus group. Opportunities exist for more product development in support of this route.

Project 1.3: Create inter-linked culture and heritage route

There are a number of historical buildings within the LLM, and a walking route is possible around such heritage buildings within Montagu. There is however a number of other buildings, buildings styles, historical sites, and places of unique cultural interest within the LLM that, if connected through a route, would attract a wider target market, and diversify product offerings within the municipality. The purpose of this project is therefore to identify cultural and heritage products within the LLM and connect them through a route. This route development should also investigate the possibility of the inclusion of a 'township tour' as part of the interesting cultural, historical, and heritage opportunities within the sector. Other possible options to include is the traditional medicine as a cultural feature, as well as some of the alternative living communities within the LLM.

Opportunities exist for more product development around culture and heritage in support of this route.

Project 1.4: Facilitate the creation of more adventure products and link through route

Adventure tourism has not yet reached its potential in the LLM, and consequently, there is an important tourism development opportunity in this market. There are a number of adventure products in the LLM, such as rock climbing, zip lines, paragliding, water rafting etc. But, given the natural endowments of the area, and proximity to Cape Town, it is expected that significant growth can take place in this sector. It is also important to note the close links with adventure tourism, and things like MTB riding and trail running etc., which have been dealt with under the first project. Also important to note, is that the youth market might have limited transport access to Langeberg, and its tourism products. This has been dealt with in the Infrastructure Focus Group. The municipality should create an enabling environment for such product development to take place, and these products should be linked through an adventure route – and marketed accordingly.

Project 1.5: Support further development of the wine route

The wine route is currently well developed in the LLM, and as it is one of the anchor products in the LLM, its continued support is vital. As with other routes, this should be included in the route maps, as per the marketing focus group.

Project 1.6: Facilitate the creation of more health & wellness products and link through route

Another group of products within the LLM, which is relatively unique to competitors are those related to health and wellness. There are a number of products related to health and wellness, mostly concentrated in Montagu and McGregor. It is expected that product development opportunities around health and wellness exist, and the enabling environment for this needs to be created by tourism stakeholders. The linking of these products through a route is expected to create a stronger profile of the LLM as a health and wellness destination.

Project 1.7: Further develop farm tourism and route

Tourists are currently able to visit many of the farms in the area, pick fruit, take tractor rides, learn about the farming techniques used, and purchase farm products. Furthermore, opportunities exist in further showcasing of the horse breeding that takes place in the LLM. It is recommended that this is a potential growth area in the LLM, and should be linked by a 'farm route'. A best practice example of this is the Midlands Meander in the KZN midlands, where a primarily agricultural base economy was able to diversify through making available agricultural products, as well as arts and crafts to passing tourists. Product development options include more farm stalls, farm visits, education around farming, experiencing fruit picking etc.

Summary of objective 1:

Objective	Project	Actions
Create & link products through routes to aid destination development	Create inter-linked hiking, cycling, and walking trails as routes	Audit of all potential routes
		Acquire necessary agreements, permissions, etc. for route development
		Upgrade and develop necessary infrastructure for routes
		Create route signage
		Include route in LLM activity route map
	Create inter-linked art and craft routes	Conduct audit of art and craft products
		Identify and provide business development support to emerging art and craft businesses
		Create route signage
		Include route in LLM activity route map
	Create inter-linked culture and heritage route	Identify all cultural, historical, architectural and similar products
		Upgrade products where necessary
		Create route signage
		Include route in LLM activity route map
	Facilitate the creation of more adventure products and link through route	Identify current adventure tourism products, and potential products
		Facilitate new product development for identified adventure tourism products
		Investigate possibility of 'adventure centre' in LLM
		Create adventure route signage
		Include route in LLM activity route map
	Support further development of the wine route	Continued support of the wine route
		Create wine route signage
		Include route in LLM activity route map
	Facilitate the creation of more health and wellness products and link through route	Identify all health and wellness products
		Identify health and wellness opportunities and facilitate development
		Create health and wellness signage
		Include route in LLM activity route map
	Further develop farm tourism and route	Identify all farm related products and activities
		Identify development opportunities related to farm activities
		Lobby product owners to diversify farm activities
		Create farm route signage
		Include route in LLM activity route map

Objective 2: Fill product gaps linked to the LLM's competitive advantage

The status quo analysis, and the analysis thereof, noted a number of competitive advantages and selling points within the LLM that have not been fully realised in tourism product development in the LLM. As stated above, the development of the sector products should be undertaken by the private sector, but the municipality has a role to play in identification of these products, seeking investors, and creating the enabling environment for such developments to take place. While there are a variety of potential products within the LLM, the focus of this objective is on those potential products, where gaps have been identified. It is noted that some of the gaps and potential projects have been addressed in the

objective above, and are therefore not included here. The projects recommended to meet this objective are outlined below;

Project 2.1: Grow nature based tourism

The situational analysis for this project showed that one of the key unique selling points for the LLM is the rich natural heritage that the municipality has. This presents a number of opportunities for a diverse range of visitor experiences. Some of these, such as hiking trails and MTB trails have been dealt with above. The potential of nature based tourism has largely been neglected as potential products within the municipality. The status quo analysis found that there are 12 formal protected areas in Langeberg Municipality covering 79752.7ha (nearly 24%) of the municipality. Much of this is under the control and management of the LLM, which, given the different development needs within the municipality, might be the reason for the limited product development. Many reports were received of lack of maintenance of infrastructure within these natural areas, which severely constraints the development and marketing of these attractions to tourists. Furthermore, it is noted that several interest groups have been established to assist in protection of these natural resources, but these are only advisors to the local municipality, and issues around enforcement and actions related to this were reported. The actions relate to this project are around identification of the key natural attractions within the LLM, in conjunction with stakeholders, and agreements on cooperation on preservation, and tourism relevant product development for the natural areas. Suggestions around this project include;

- *Grow avi-tourism*
- *Develop supporting infrastructure in identified conservation areas with tourism potential*
- *Grow local natural attractions such as the Ibis Bird Hide*
- *Etc.*

This overall aim of this project is to grow tourism through sustainable exploitation of these natural resources, by product development to attract domestic and foreign tourists who seek nature based tourism experiences

Project 2.2: Develop educational tourism

Given the proximity to Cape Town, and the year round good weather, as well as the diverse products within the LLM, it is recommended that the educational tourism sector is developed in the LLM. Educational tourism is:

A person who travels outside of their usual environment for at least one night and not more than one year, for whom education and learning is a primary or secondary part of their trip.

As such, the definition includes school learners, higher education learners, persons involved in research trips, persons wanting short courses such as photography, wine making, cookery, bird

identification etc. A number of activities or potential activities have been identified that could be used to attract educational tourism to the LLM, as follows;

- *Leaners who undergo learning as part of their school curriculum (linked to learning areas)*
- *Scholar winter / summer school, “veld skool” etc.*
- *Higher education students who conduct field trips as part of their courses (geology, wine making, tourism and hospitality, botany etc.)*
- *Wine making*
- *Cookery*
- *Healing techniques*
- *Scout excursions (hiking, orienteering etc.)*
- *Etc.*

The development of the LLM as a centre for learning, based on the competitive advantages, can attract tourists in low season months, and available infrastructure such as the skills centre can be used as a centre for this. A number of actions are recommended for this, as further research will be required in developing this as a tourism product in the LLM.

Project 2.3: Develop business tourism in the LLM

As with educational tourism, opportunities are there to grow the business tourism market in the LLM, based on the all year round good weather, proximity to Cape Town, and available activities. In particular, the target market for this type of tourism should be for small business meetings, where managers want to meet outside of the office environment, or for team building etc. Given the shortage of large conference size venues in the LLM, it is recommended that the focus is on smaller meetings as highlighted above. It is not expected that any new product development will be required for this, but rather a focus would be on ‘tweaking’ existing products, and marketing to potential businesses for meetings, incentives, and small, out of office conferences.

Project 2.4: Grow events tourism in the LLM

Events currently play a major role in attracting tourists to the LLM, but it is considered that there is potential to grow events, to attract tourists in out of season times, and improve word of mouth marketing opportunities. These events need to be strategically selected, to ensure that they speak to the competitive advantages within the LLM, and based on their expected impact. It is further recommended that the impacts of events are assessed, to facilitate funding, sponsorship, and future planning of such events. Furthermore, it is recommended that a specific focus is given to the destination as a wedding destination, given its natural attractions, infrastructure, and proximity to Cape Town.

Summary of objective 2:

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Objective	Project	Actions
Fill product gaps linked to the LLM's competitive advantage	Grow nature based tourism products	Conduct full audit of natural attractions with tourism potential
		Develop, in conjunction with stakeholders plans for product development
		Create institutional framework for cooperation around protection and development
		Create products as recommended in plan
		Ensure regular maintenance of natural attractions
		Market natural attractions to potential tourists
	Develop educational tourism	Identify potential educational learning areas
		Identify potential markets for learning areas
		Adjust products, with relevant skills development etc. to attract educational tourists
		Market educational opportunities with potential markets
	Develop business tourism in the LLM	Identify products that can be linked to business tourism
		Identify potential target markets for business tourism
		Market to potential markets
	Grow events tourism in the LLM	Audit of all events
		Determine gaps (based on time of year, and links with competitive advantages)
		Create budget for all events
		Monitor event impact
		Develop wedding packages
		Market wedding packages to target markets

FOCUS AREA: TOURISM MARKETING AND COMMUNICATION

Destination marketing is the process of communicating with potential visitors to influence their destination preference, intention to travel and ultimately their final destination and product choices. Destination marketing is the articulation and communication of the values, vision and competitive attributes of the destination. As such, marketing and communication of an area as a tourism destination and the tourism products within that destination are a critical component of the tourism system. The status quo analysis found that each of the towns within the LLM, and the tourism products themselves make good use of different marketing tools to reach potential tourists. However, as found during the status quo phase of this strategy development, there are a number of issues related to this marketing, which constrains tourism growth in the LLM.

- There is no cohesion and cooperation in marketing, constraining the 'selling' of the LLM as a destination, rather than a collection of towns and products
- There is no brand identity of the municipality as a whole, rather a collection of town identities, with their own marketing branding, tools etc.
- Marketing is largely not targeted to potential tourism markets, either in terms of who the markets are, and the tools to reach those markets

- There are no linkages between products of a similar type across the municipality, which would create greater interest if the LLM were marketed as an 'adventure destination', 'wine destination' or 'wedding destination' for example.

In terms of communication, there is no comprehensive, easily accessible, up-to date tourism product database, which will allow tourists to access information on products available, but also allow for the growth of the tourism sector to be monitored. Constraints also exist on the provision of information to tourists once they have reached the Langeberg, and opportunities for improved communication need to be grasped.

The projects under this objective are designed to address these constraints, and grasp marketing opportunities to meet with the strategic objectives of this strategy.

Objective 3: Coordinated marketing efforts based on agreed strategic framework

As stated above, there is little coordinated marketing within the LLM. Private product owners generally market their own products and areas without any cognisance of a desired marketing direction for the destination as a whole. Furthermore, the product owners market to their target markets, and there is little strategic marketing to reach the potential target markets for the LLM as a whole. Likewise, each town, and their tourism association markets to their own potential target markets, without any brand, identity and strategic direction towards marketing the Langeberg. The municipality itself markets the area without cognisance of target markets, and without strategic direction. Coordinated marketing, based on an identified target market, with a common theme, a common branding and logo and a common message will ensure that marketing efforts are more effective in attracting greater numbers of tourists to the LLM and increased length of stay. This objective seeks to do this through the following projects and actions.

Project 3.1: Develop branding strategy for LLM

Currently, there is no branding for the municipality as a tourism destination and the name "Langeberg" has little brand identity, particularly amongst tourists. On the other hand some of the towns within the LLM have well recognised names, and brand identities. A marketing and branding focus on the name "Langeberg" is not expected to currently resonate with potential tourists. On the other hand, focussing on recognisable town names as brands, prevents the effecting marketing and branding of the area as a destination as a whole. There is also no common branding elements within the Langeberg, in terms of logos, websites, brochures etc., particularly between the towns that make up the LLM.

Branding is a significant method to differentiate a specific destination from other places. Through branding, the LLM tourism destination can develop a specific identity with which to direct marketing and promotion initiatives. It is strongly recommended that a branding strategy be developed for the municipality's tourism sector, through consultation with all key tourism

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stakeholders. It is suggested that this should be created by an external marketing expert, with input from key tourism stakeholders, and persons within the municipality with marketing expertise, to ensure an independent, and effective strategy.

The branding of the LLM should be a visual mechanism through which the tourists can imagine the type of tourism products available, and therefore be attracted to the municipality as a tourism destination. The brand proposition for the LLM should be based on the values of the destination and build upon the point of difference or unique selling point of the LLM. A successful brand is emotionally appealing, targeted to visitor preferences and values and efficient in the delivery of that message.

This should, as much as possible be aligned to the LLM branding strategy, and should contribute to creating a brand identity around the term, Langeberg, while at the same time making use of the existing brands within the municipality. It is further recommended that an umbrella brand be created for the municipality as a whole, with differentiated sub-brands in support of the parent brand with, logos etc. for the various towns within the LLM. Once the brand identity has been developed, it is important that all products within the LLM and their marketing material reflect this new brand identity. The coordinated use of the branding and logos will enable individual tourism product owners and the municipality as a whole to differentiate their product and the destination as a whole from the competition.

Some of the suggested brand identities / marketing propositions recommended through the consultation phase of this project and in previous marketing strategies for the LLM are provided in the box below;

Mountain retreat waiting to be explored	Gateway to wellness, wine and adventure
Escape to the friendly	Essence of discovery
Ultimate experience of Winelands	The experience of the essence of life through all your senses
Discover	Sensory experiences
Unexpected discovery	Valley of discovery
Valley of amazement	Escape to yourself
Simplicity of life	Treasures of the Langeberg – discover and explore
Wine and adventure – destination of the Winelands	Discover living
McGregor of the Langeberg, Robertson of the Langeberg, Bonnievale of the Langeberg etc.	Play on the meaning of the word Langeberg (long mountain); long escape, long pleasure, longest experience in a short time.

Is it also noted that currently Montagu and Ashton are jointly marketed, but given the fact that their offerings are very different, and there is little association between the two, that separate sub-brand identities be created for these two towns.

Project 3.2: Develop marketing plan for LLM

A marketing plan sets the framework and direction for all marketing activities for a destination including market research, brand development (dealt with in previous project) and management, advertising and promotion, sales, distribution and cooperative marketing opportunities. While some of the key recommendations for marketing the LLM as a cohesive tourism destination have been touched on elsewhere in this strategy, it is strongly recommended that a full marketing plan be developed for the municipality, based on the identified tourism markets and USPs. This marketing strategy should be developed by a professional appointed for this purpose, and should be closely aligned to the district marketing strategy where possible, and furthermore aligned to neighbouring LM marketing strategies and initiatives. Furthermore, the marketing plan should make use of the branding strategy as outlined in the previous project.

Project 3.3: Create marketing partnerships and forum for cooperative marketing

Marketing initiatives are often costly. Furthermore it is important to remember that tourists do not recognise political boundaries when entering a destination. It is the products and the experience that will move them from one place to another. For example, in a day trip tourists could regularly cross between one municipality to another. While each municipality competes with the next one to attract tourists based on their competitive advantages, there is significant benefit in cooperation between these municipalities to attract tourists to the area as a whole. Through such cooperation, tourism numbers to the area as a whole can be increased, thereby benefiting all stakeholders.

Currently, one of the big constraints to marketing the LLM as a destination is the silo approach to marketing taken by the individual towns which make up the municipality. This is expected to be addressed somewhat by the suggested projects in this strategy, and through a cohesive marketing and branding plan. Some marketing collaboration currently takes place within the district, but it is understood that little such collaboration takes place with neighbouring municipalities etc.

In order to implement a more coordinated approach to marketing in the LLM it is necessary for all stakeholders to meet regularly and devise ideas and strategies. It is recommended that this is achieved through the development of a regional marketing forum where the LLM, tourism associations, the district and provincial marketing entities and other key stakeholders can meet. The forum will provide a platform for stakeholders to air their concerns, to come up with marketing ideas, and for the stakeholders to decide on the coordinated implementation marketing initiatives. Ideally, this forum should be established on district level.

Summary of objective 3:

Objective	Project	Actions
Coordinated marketing efforts based on agreed strategic framework	Develop branding strategy for LLM	Appoint branding expert
		Workshop the development of tourism branding
		Disseminate brand identity and ensure all products, marketing etc. make use of branding
	Develop marketing plan for LLM	Appoint marketing expert
		Workshop the development of marketing strategy
		Implement marketing strategy
	Create partnerships for cooperative marketing	Identify potential marketing partners for marketing forum
		Invite to forum and launch forum
		Quarterly meetings of forum

Objective 4: Targeted marketing to identified target groups through relevant tools

As stated above, it is critical that the LLM be marketed as a destination itself, rather than merely a collection of tourism products within a geographic area. The marketing for LLM needs to focus on the USP that distinguishes the destination from other destinations; namely the rich natural, cultural and historical heritage, the proximity to Cape Town, its adventure and health and wellness products, and option as an alternative to major transport routes. Importantly, the wine industry is an anchor to the tourism sector, and this, in combination with the other USPs must be used to market to identified target markets. These include domestic and international holiday and leisure tourists, special interest tourists, the youth market, educational and business markets, and weekend getaway and events markets. Most of these tourists are to be found outside of the LLM, and specific interventions are needed to access these tourists, remotely. The objective is therefore to achieve this, through the following projects:

Project 4.1: Develop generic tourism brochures to market the LLM as a destination

The LLM has a good tourism brochure which is distributed to potential visitors through a number of channels. It is recommended that future municipal tourism brochures be developed showcasing all products available, in the area, with a strategic focus on marketing the LLM as a cohesive destination. These brochures should reflect the agreed branding of the municipality and should include a map showing the key routes through the LLM, as discussed elsewhere in this strategy. These brochures should be jointly funded by the municipality and by the product owners through small advertising fees. These brochures should be on display at trade events to target international and domestic tourists, and should also be available at all products within the municipality and on the tourism routes into the LLM. Furthermore the brochures should be made available on the Apple Express and at strategic locations in Cape Town and at district attractions to attract the domestic market to make use of the products available in the LLM. The brochures should also be available at key points where tourists can be encouraged to take alternative routes to their destinations, via the LLM, such as Beaufort West, Worcester, Barrydale,

Swellendam, Outshoorn etc. It is also suggested that the brochures be developed in digital format, allowing all product owners, associations, marketing partners etc. to place on their websites, in digital format.

Project 4.2: Create digital marketing platforms

As well as the digital brochure explained in the previous project, it is recommended that significant attention be directed towards creating a digital and social media presence for the marketing of the LLM as a tourism destination particularly to target markets such as the youth. While traditional methods of sales and distribution such as travel shows, tour wholesalers and travel agents still play a real part in converting potential visitors, the trend toward online conversion has been the focus of much attention in the future of sales and distribution techniques in the tourism industry. Specific recommendations include;

- The redevelopment of the LLM tourism website, to market the area as a destination, with links to all products, based on the identified USPs in the area. Links to the website should be created from all partner websites, and to all products within the LLM and visa versa*
- Develop a LLM tourism Facebook page, with links to individual products within the LLM, and visa versa*

Project 4.3: Market the LLM as a tourism destination at relevant trade shows and exhibitions

Another key marketing tool for the LLM is to participate in tourism trade shows and exhibitions. Such trade shows are a key mechanism to reach both international and domestic markets. However, these trade shows etc. are often expensive to attend, and joint marketing initiatives are critical for maximum exposure at minimum cost. Agreements between product owners and the LLM and the LLM and other neighbouring municipalities and with the district can give critical mass to these initiatives, thereby reduction costs.

Project 4.4: Make use of relevant media to reach target markets

Magazines, newspapers etc. are often expensive tools for marketing. In the case of special interest tourist groups, such media has the potential to effectively reach target markets. Engagement with media can be through the payment of “sponsored” pages, through adverts or through invitations for media visits for articles. It is suggested that media outlets be selected through their ability to reach identified target markets. Possibilities include;

- Outdoor, adventure and getaway magazines*
- Wedding publications*
- Wine related publications*
- Sports publications, including those related to rock climbing, MTB etc*
- Nature based publications*

- *Health and wellness publications*

Summary of objective 4:

Objective	Project	Actions
Targeted marketing to identified target groups through relevant media	Develop generic tourism brochures to market the LLM as a destination	Appoint service provider to create new brochure
		Include all relevant branding and route map etc. in brochures
		Distribute brochure at trade events
		Distribute brochure at identified strategic locations
		Create digital brochure and distribute to relevant websites
	Create digital marketing platforms	Redesign LLM tourism website with relevant links, downloadable brochure etc.
		Create LLM tourism Facebook site
	Market the LLM as a tourism destination at relevant trade shows and exhibitions	Create partnerships for trade show marketing
		Identify relevant trade shows based on potential to reach target markets
		Provide relevant material for trade show marketing
	Make use of relevant media to reach target markets	Identify relevant publications based on selling points of the LLM
		Create media releases for media visits
		Fund and place adverts / sponsored articles where identified

Objective 5: Ensure ready access to tourism information for tourists within the LLM

It is essential that tourists have easy access to information on tourism products within the LLM, once they have reached their destination. There is little point in having a number of good quality tourism products if the whereabouts and information of those tourism products are not easily available to potential tourists. In this case tourists should be able to find tourism information from readily accessible sources such as tourism offices, tourist information boards, tourism events calendars and tourism maps.

The projects recommended to meet this objective are outlined below;

Project 5.1: Create an accessible tourism database of all products

A comprehensive tourism product database is important to fully market all the activities available within a particular destination. Such a database, if regularly updated, can also indicate growth or contraction of the industry within that destination. Furthermore, access to the database can assist product owners in making recommendations about other activities within the LLM to their tourists. The current tourism product database in the LLM is limited in that it includes only the products of LTA members, and non-owned products such as hiking trails, and non-member products are omitted. The primary actions in this project involve the creation of the database, and regular maintenance thereof and the placement of the database on relevant websites etc.

Project 5.2: Provide information and visitor services to tourists

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Tourists already in the destination also require information on services, activities and attractions available. This will encourage them to spread across the LLM, and possibly increase their length of stay, and encourage return visits. A number of things can be done to provide such information;

- Ensure that all front line tourism staff that come into contact with tourists are equipped with relevant information on the destination's tourism attractions. This has been dealt with under the focus area, human resources, in projects related to tourism awareness*
- Tourism information offices are the most common way for tourists to source information once at the destination, and tourists know to look for the "i" sign for such offices. It is recommended that each town has a tourism office, staffed by two, skilled tourism information offices. These offices should be open every day, with both staff on duty on busy days such as Saturdays and Sundays. Having two staff members allows for rotation on their days off.*
- Ensure that relevant marketing media is placed at all well visited tourism attractions (restaurants, accommodation, attractions, wineries etc.). In particular, the map of the destination as discussed above should be readily available*

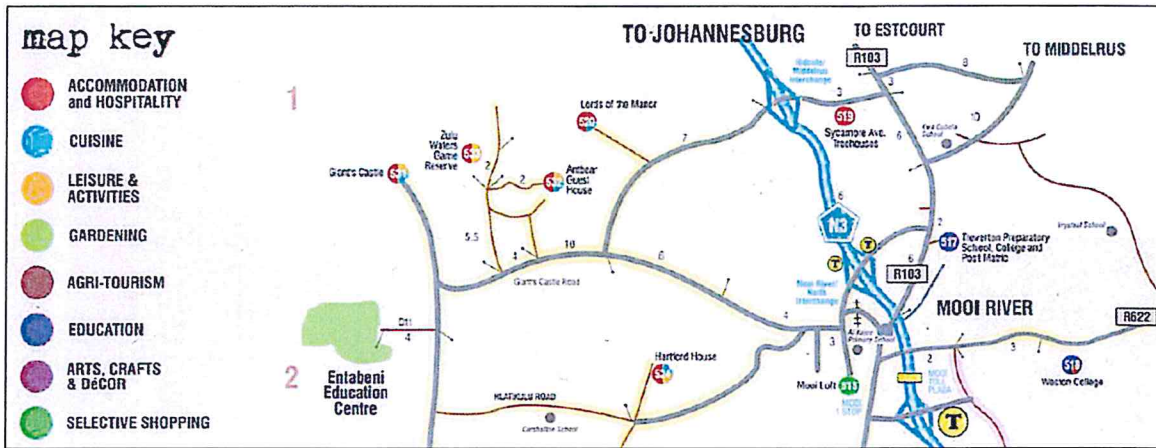
Project 5.3: Develop a regularly updated and accessible events calendar

Given the large number of events that take place in the LLM, and the number of tourists attracted to these events, it is recommended that a regularly updated events calendar is created. This will, in addition to giving tourists, and potential visitors information on events, be a useful marketing tool. In addition, it will allow tourists to time their visit to coincide with events which take place around activities that they are interested in. This calendar needs to be published on all electronic media, in brochures, social network platforms etc.

Project 5.4: Create municipal wide product map with routes

It is recommended that a municipal wide tourism product map be created for Langeberg. This map should be activity based, with icons or colours allocated for adventure, wine, health and wellness activities. Routes between such activities should be differentiated in different colours or, and should include hiking, walking, cycling routes etc. Refer to Product Development Focus Area for recommended routes to appear on this map. This would create suggested tour itineraries for tourists, focussed on the primary activity they are interested in, but also other activities. Detailed information on the routes, and products available, can be provided on the back page of the map. This would enable visitors to create their own packages, based on activities they would like to engage in, and will thus help to distribute tourists across the municipality, potentially increasing length of stay within the LLM. This map need not be to scale, and should be visually stimulating and indicative of the wide variety of activities available in the LLM. An example of such a map is provided below, from the Midlands Meander in KwaZulu-Natal;

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Source: <http://www.midlandsmear.co.za/index.php?content=meander&Itemid=64&option=>

Summary of objective 5:

Objective	Project	Actions
Ensure ready access on tourism products to all tourists	Create an accessible tourism database of all products	Source information on products through internet, LTAs, municipal products etc.
		Verify all details on sourced database
		Create internet based database
		Disseminate database (website, notification to product owners, CWD, WESGRO etc.)
	Provide information and visitor services to tourists	Create tourism office in Bonnievale
		Appoint two tourism information officers for each office
		Ensure that staff have required skills to offer services to tourists
		Distribute relevant information brochures to all tourism products
	Develop a regularly updated and accessible events calendar	Conduct monthly audit of all LLM events
		Create calendar
		Regularly distribute calendar to all tourism stakeholders and in marketing media
	Create municipal wide product map with routes	Appoint service provider to create map with route
		Identify all products and routes to be placed on map
Produce and print map		
Distribute map to all tourism products, information centres etc.		

Objective 6: Improve marketing through collaboration with routes & areas outside of LLM

There are a number of options to market the LLM as an alternative route to the main roads between key tourism areas in the WC and beyond. The purpose of this objective is to make use of these alternative routes to attract greater numbers of tourists through the LLM.

Project 6.1: Make use of established and alternative routes to attract tourists

The Route 62 and the proposed Sunshine route can be used to attract tourists to the LLM as an alternative to the main roads currently used by tourists when going to and from Cape Town.

These routes need to be engaged with and further developed to attract tourists to the LLM. Partnerships need to be created for this, and relevant infrastructure and signage will need to be developed. These partnerships can include linkages to the relevant websites, brochures on LLM tourism products at all other products on the respective routes, and joint marketing initiatives such as newspaper and magazine publications, and attending trade events.

Project 6.2: Investigate feasibility of creation of local alternative routes to Cape Town

For tourists coming for the day or weekend to the LLM, there is generally only one route that they make use of, through Paarl. Tourists generally do not like to, on short trips, return to their origin through the same route. Potential therefore exists for the creation of a circular route to the LLM through the following options;

- *The alternative route through Grabouw*
- *Alternative route through Swellendam*
- *Others?*

Summary of objective 6:

Objective	Project	Actions
Improve marketing through collaboration with routes and areas outside of the LLM	Make use of established and alternative routes to attract tourists	Continue building relationship with Route 62
		Assist with the development of the proposed 'Sunshine Route'
		Provide necessary infrastructure to facilitate these alternative routes, signage etc.
		Provide and link marketing material with routes
	Investigate feasibility of creation of local alternative routes to Cape Town	Identify potential alternative circular routes to access LLM
		Meet with relevant stakeholders
		Market routes if feasible

FOCUS AREA: TOURISM RELEVANT INFRASTRUCTURE

Infrastructure is another critical part of the tourism system. The status quo analysis found that transport infrastructure to and around the LLM was generally good, but improvements can be made in some places. Tourists generally don't have a sense of arrival in the LLM, and each of the key towns within the municipality, and the strategy therefore makes recommendations around this. Finally, the status quo analysis found that the lack of public transport between products and towns, needs to be improved in order to enable tourists to experience the municipality as a destination as a whole, one of the strategic objectives of this strategy.

Objective 7: Ensure the local infrastructure is supportive of tourism growth

Local infrastructure is largely provided by the municipality, but, can be supported through initiatives spearheaded by other stakeholders. This objective is focussed on the “look and feel” of towns and its infrastructure, important to create a good impression of the town, and important in generating word of mouth marketing to other potential tourists. Furthermore, it concerns the infrastructure, particularly road infrastructure between towns, which was noted in the status quo analysis to be problematic at times.

Project 7.1: Review heritage protection guidelines for LLM

Many of the buildings within, in particular, Montagu and McGregor, and heritage buildings, and the presence of these buildings gives a historical feel to the municipality, adding to the overall appeal of the towns. These buildings are in some way protected through their heritage status. It was found in the status quo analysis that structures are in place to advise on whether planned developments will detract from the general aesthetics of the towns. Any development that is not in keeping with the historical and architectural heritage of the area, can negatively affect the look and feel of the towns, damaging tourism. It is strongly recommended that heritage protection guidelines be reviewed to ensure they are aligned with national and provincial guidelines, in consultation with relevant stakeholders. Furthermore, measures should be taken to ensure that these guidelines are made use of in all planning processes.

Project 7.2: Create a welcoming 'look and feel' for tourists in towns in LLM

It is important for the growth of tourism in the LLM that the towns within the LLM are attractive and welcoming. Furthermore, a sign or display welcoming visitors to each town will add value to the overall tourism experience that the visitors have in the LLM. Towns that are clean and litter free, well maintained, and still have their historical integrity will create a positive perception of the tourist destination. This project is therefore focussed on creating a welcome display into each town, and improving aesthetic value of tourist areas in the towns of the LLM.

There are a number of simple interventions that can help improve the aesthetic value of the towns, such as¹⁹:

- *Lining the main roads and entrances to towns with trees*
- *Developing neat sidewalk displays*
- *Erecting old street lamps to add to the historical charm of the town*
- *Developing neat entrances to towns with gardens or sculptures with a welcoming sign with relevant branding (see branding objective above)*
- *Etc.*

¹⁹ This is not a comprehensive list of possible interventions as there are many ways in which towns and their entrances can be beautified. The main actions proposed to implement the project recommend that other possible interventions be identified.

Summary of objective 7:

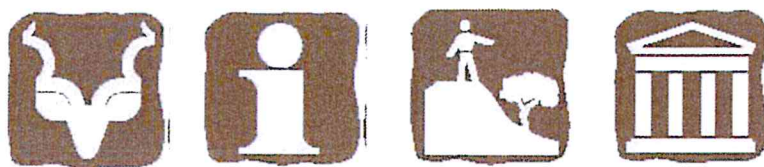
Objective	Project	Actions
Ensure the local infrastructure is supportive of tourism growth	Review heritage protection guidelines for LLM	Review heritage and aesthetic selling points of each town
		Review local, provincial and national guidelines on heritage buildings and aesthetics
		Review local government heritage protection guidelines
		Get approval of guidelines from council
	Create a welcoming 'look and feel' for tourists in towns in LLM	Ensure guidelines used in all planning processes in LLM
		Conduct audit of key tourist areas, and entrances to towns
		Develop plan for beautification and welcoming entrances
		Investigate possibility of use of 'trepreneur' project at town entrances
		Investigate possibility of inter-town competition for entrance beautification
		Ensure cohesive branding and 'look and feel' across towns to market LLM as destination

Objective 8: Spatially spread tourism in LLM through infrastructure provision

Insufficient infrastructure poor quality transport infrastructure, can constrain the development and growth of the tourism sector in LLM. Diversification of the transport infrastructure available to tourists has the potential to grow the LLM tourism sector in a manner that is more geographically spread across the municipality, one of the strategic objectives of this tourism strategy. This objective is focussed on the use of signage, non-motorised transport infrastructure, and road infrastructure to spatially spread tourism across the LLM.

Project 8.1: Improve access to tourism products through signage provision

The provision of signage infrastructure of a good quality is critical to the growth of the tourism sector within the LLM. Signage should be both directional, in that it shows tourists how to get to a specific product or area, but it can also be an important marketing mechanism for an area's tourism products. For this, it needs to be of good quality, strategically located, and it needs to effectively showcase the products available within the area through which a tourist is travelling. Furthermore, all signage has to comply with national regulations, contained in the South African Road Signs Manual (2012) as well as local municipal guidelines. It is noted that a constraint to the erection of signage within the LLM is the expense and time in the approval process. The actions necessary for this project, are designed to assist with the signage process, ensure that signage reflects the branding of the municipality whilst within national and local guidelines, and effectively spreads tourism across the LLM. It is important to note that across South Africa, brown signs are instantly recognisable as tourism products, and this should as much as possible be adhered to, to facilitate a nationwide tourism signage brand association, as shown in the following pictures;



Project 8.2: Create non-motorised transport infrastructure

In order for the LLM to increase tourist numbers, particularly around nature based and adventure tourism, improved non-motorised infrastructure is required. The lack of such infrastructure is currently a constraint to growing these tourism sub sectors in the LLM, and provision of such will allow the sector to grasp the opportunities presented, and spread tourists to other parts of the LLM. Specifically, the following non-motorised infrastructure needs to be investigated and implemented in support of product development in the LLM;

- *Hiking, walking and trail running trails in both municipal and non-municipal owned land*
- *Cycling trails, in municipal and non-municipal owned land (both road and MTB)*
- *Launch places for river related boat tourism*

Summary of objective 8:

Objective	Project	Actions
Spatially spread tourism in LLM through infrastructure provision	Improve access to tourism products through signage provision	Facilitate signage permission for all products through relevant policies
		Ensure all stakeholders make use of guidelines in policy, and LLM branding
		Ensure signage is placed at all strategic points in the LLM
	Create non-motorised transport infrastructure	Conduct audit into current and potential non-motorised infrastructure needs
		Identify infrastructure development and maintenance needs
		Create partnerships for infrastructure development
		Develop infrastructure, with relevant signage

Objective 9: Grow the LLM tourism sector through facilitation of more transport options

While this objective is not specifically related to the provision of infrastructure, projects related to transport are included under this focus area as there are usually infrastructure requirements to facilitate this. One of the key constraints to growing the tourism sector amongst potential target groups is the lack of sufficient public transport, or transport for those persons without or not wanting to use cars. This also constrains the spatial spread of tourism across the LLM, one of the strategic objectives of this tourism strategy. The project related to this objective are therefore around the provision of transport services other than in privately owned vehicles, both in getting to the LLM, and moving around the municipality.

Project 9.1: Investigate feasibility of train tourism

There is a train line that passes through Robertson and Ashton, but this line is currently used only for cargo freighting. Suggestions were made by tourism stakeholders that the development of this line as a weekly transport option to the LLM from Cape Town areas, could bring significant number of tourists to the municipality. A number of similar examples exist in the country, a selection of which follows (note that these are narrow gage, steam trains rather and don't make use of other, functioning rail lines);

Inchanga Choo Choo: <http://www.umgenisteamrailway.co.za/index.php>

Apple express: <http://www.appleexpresstrain.co.za/>

Such an undertaking would require significant resources, and buy in from a wide range of stakeholders. The focus of the actions related to this project are therefore around a feasibility for the development of this train route to the LLM. Note that the development of the train route, would require further development of the transport services within the LLM, to disperse train tourists to products around the destination.

Project 9.2: Create link with Baz Bus

One of the key identified target markets, particularly around the natural and adventure tourism products in the LLM, is the youth, and in particular, backpacker market. Many of these tourists make use of the Baz Bus to transport them around the country. The fact that the Baz Bus goes only as far as Swellendam, constrains this target markets access to the LLM and its products. In other places in South Africa, towns and tourism products organise 'pick ups' for Baz Bus passengers to their attractions. It is strongly recommended that this link is created by the LLM with the Baz Bus Company to better attract this target market to the LLM.

Project 9.3: Facilitate public transport between towns and products

The lack of public, and or private transport service provision between towns, and products, constrains the tourism industry growth in the LLM. In particular, it means that tourists who do not have private vehicles are not able to easily travel across the municipality to experience its diverse tourism product offerings. Another concern raised regarding the lack of public transport is around the fact that tourists visiting the wine farms, who find themselves over the limit, have few options to return to their accommodation, raising the risk of drink driving in the LLM. It is recommended that improved public transport is required in the LLM, either through public provision, or through agreements with the local taxi industry to provide such services. In particular, tourist travel is likely to be outside of taxi high peak times, and provision of such services to tourists is likely therefore to increase their viability. It is recommended that strong guidelines are set, as well as operating processes to ensure the safety and security of tourists, and the reliability of services offered.

Summary of the objective 9:

Objective	Project	Actions
Grow the LLM tourism sector through facilitation of more transport options	Investigate feasibility of train tourism	Conduct a feasibility assessment
		Based on findings of feasibility, create development plan
		Lobby stakeholders for support
	Create link with the Baz Bus	Select local transport providers / taxi operators to provide service
		Lobby Baz Bus to market the pick-up service
		Market Baz Bus pick up service in relevant marketing tools
		Facilitate link between transport providers and products, LTA
	Facilitate public transport between towns and products	Conduct audit into public transport needs in LLM
		Engage with private providers and taxi industry on participation
		Agree on norms and standards, and operating procedures for tourist transport
		Monitor functioning of tourist public transport

FOCUS AREA: HUMAN RESOURCE DEVELOPMENT

In order for the tourism sector in the LLM to grow to its potential and achieve the vision of the sector, human resource development is needed. Human resource development involves the capacitating of individuals so that they can assist in the successful functioning of the tourism industry. Many individuals or groups of individuals are in some or other way involved in the tourism industry and thus have to perform certain functions. These persons are often not employed directly in tourism businesses, and are therefore often neglected in human resource development. The aim of this focus area is to provide individuals working within or in connection with the tourism industry in the LLM with the capacity to perform their tasks more efficiently and effectively so as to meet the demands of the tourist target markets. It must be noted that as a service based industry, it is critically important to ensure that tourists receive the level of services that they demand when in a particular area. This is particularly the case of foreign tourists, who in many cases have higher service level expectations than domestic tourists.

Objective 10: To ensure awareness of the tourism sector by all residents

This objective aims to get “buy in”, with respect to the importance of developing the tourism industry, from those living within the LLM. This entails making residents aware of the potential benefits of a thriving tourism industry and aware of the economic growth multiplier effect and how this growth will positively impact on their standards of living. However, residents also need to be made aware that in order for the tourism sector to grow and for them to receive the benefits of this growth, then they need to do their part in promoting tourism within the municipality. For instance, the residents need to be made aware of the following:

- The importance of hospitality in promoting tourism in the District

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- The importance of being friendly and welcoming in order to create a good impression
- The importance of being informed and helpful
- The potential benefits of working in the tourism industry
- How the tourism industry functions
- How they fit into the broader picture
- The multiplier effect of economic growth and how the tourism industry has knock-on effects that help improve their standard of living.
- The importance of frontline staff in the service industry

The following projects are recommended to meet this objective;

Project 10.1: Conduct tourism awareness campaign for all residents of LLM

In order to generate awareness of the tourism sector within the LLM it is necessary to hold a tourism awareness campaign. The relevant tourism authorities from the province and district, LTAs and other key stakeholders need to coordinate their efforts in order to organise the awareness campaign. They need to determine the content of the campaign, the target areas and how the campaign will be carried out. Part of the campaign should be running of community awareness workshops that inform the local community about the tourism industry, its impacts and their role. Suggested target groups for the awareness campaign are as follows;

- *Councillors and officials in the LLM*
- *Front line staff not necessarily working employed in the tourism sector (SAPS officials, petrol attendants, cashiers in shops, street cleaners, restaurant staff etc)*

Project 10.2: Attend annual local tourism expo

It was clear in the status quo analysis that many tourism product owners are not aware of the tourism products available in neighbouring towns, and they are therefore unable to make recommendations to their guests on where to visit. Likewise, most residents are largely unaware of what the destination as a whole offers to tourists. Through an annual tourism expo, held in different towns each year, product owners will be able to showcase to other product owners from different towns, as well as other residents, the attractions available to tourists in the destination.

Project 10.3: Conduct tourism awareness and skills development for learners in LLM

An important means of growing the tourism industry within the LLM is to start at school level by educating and raising awareness of the youth as they are the future tourism product owners and service providers. It is noted that the district has a project to do just that. Lobbying for the inclusion of tourism skills development and awareness initiatives within the life orientation component of the school curriculum should assist the youth in entering the tourism industry in

years to come. However, in order to educate the youth, then it is necessary that the teachers are provided and equipped with the necessary tourism training.

Summary of objective 10:

Objective	Project	Actions
To ensure awareness of the tourism sector by all residents	Conduct tourism awareness campaign for all residents of LLM	Conduct awareness workshop with all councillors and LLM officials
		Create awareness programme for all front line staff not employed in tourism sector
		Place regular updates on tourism in LLM in local newspapers
		Create awareness programme including product visits for local community member
	Attend annual local tourism expo	Source expo funding
		Plan and implement event
		Invite all tourism product owners, officials and councillors and residents to attend
	Conduct tourism awareness and skills development for learners in LLM	Lobby for tourism to be included in local school's curriculum
		Create linkages with district on their schools tourism project
		Asset teachers become aware of the importance of tourism & its potential impacts
		Facilitate school trips for local learners to tourism products

Objective 11: Grow tourism skills in the LLM to meet growth demands

In order to meet the vision of greater opportunities for all residents in the tourism sector in the LLM, it is important that skills development takes place. Furthermore, these skills need to be relevant to the products currently in place in the LLM, and for future, proposed products and strategic direction.

The projects recommended to achieve this objective are as follows;

Project 11.1: Train LLM residents to become tour guides for nature, adventure, culture & heritage tours

The product development recommendations in this strategy make recommendations on the growth of the nature based, culture and heritage based, and adventure tourism markets to better make use of the competitive advantages within the municipality. To add value to tourists when engaging in such activities, it is strongly recommended that well trained guides are available within the municipality. This project will furthermore result in local job creation. In order to reduce the financial burden of training costs on the municipality, it is recommended that funding and sponsorship be sought for this project.

Project 11.2: Facilitate skills development through mentoring of emerging entrepreneurs

An effective method of developing entrepreneurs within the tourism sector is to provide them with on the job training through a mentoring programme. The mentoring of new entrepreneurs is seen as a key opportunity for experiential learning and skills transfer in the tourism sector. It is therefore recommended that the LLM facilitate this mentoring through the linking of current tourism product owners with emerging entrepreneurs.

Summary of objective 11:

Objective	Project	Actions
Grow tourism skills in the LLM to meet growth demands	Train LLM residents to be guides (adventure, natural, cultural etc.)	Identify skills needs in conjunction with stakeholders
		Identification of individuals in need of training
		Source funding for training
		Source training institutions / persons to conduct training
	Facilitate skills development through mentoring of emerging entrepreneurs	Develop audit of persons / businesses requiring mentoring
		Lobby product owners to provide tourism mentoring
		Link emerging entrepreneurs with product owners for mentoring

FOCUS AREA: TRANSFORMATION OF THE TOURISM INDUSTRY

While transformation is not a specific focus area or part of the tourism system, as infrastructure, marketing etc. are, it is an important component of tourism development in the South African context, and is therefore included as a focus area. In the LLM, as with other parts of South Africa, the tourism sector is largely untransformed, with few black entrants into the sector, and most businesses within the hands of white owners. Efforts are required to transform existing businesses, but also to grow the tourism sector, enabling more black owned businesses to be established.

The objective below, actions and projects under this focus area are directed towards adding to the transformation of the tourism sector in the LLM.

Objective 12: Facilitate the transformation of the tourism sector in the LLM

Transformation allows for increased opportunities for the previously disadvantaged persons and thus raises their living standards, lowers overall poverty levels and lowers income inequality. The other element of transformation is the transformation of existing businesses within the LLM. The two projects below reflect these two elements of transformation. It must be stated that other focus areas within this tourism strategy are expected to positively impact on transformation, in particular; skills development and tourism awareness, product development, the enabling environment etc.

Project 12.1: Use preferential procurement for BBBEE compliant tourism companies

The BEE scorecard in tourism applies largely to bigger tourism products, such as hotels etc. As such, it is expected that many of the smaller tourism products are exempt from the scorecard. The municipality is expected to occasionally make use of tourism products when procuring services such as catering, meeting space, and sometimes accommodation for municipal funded meetings etc. By granting preferential procurement access to businesses that are BBBEE compliant, the LLM will promote the transformation process.

Project 12.2: Provide assistance / enabling environment for BBBEE tourism product development

The other way to encourage transformation in the tourism sector, is to facilitate and assist more black tourism product owners in the LLM. This assistance can be in the form of linking to funders, assistance with feasibility assessments and business plans, training and mentoring, marketing etc. The first action required in this project is the identification of potential BBBEE projects and champions. Some of these are suggested below, but investigations need to be done on other opportunities;

- *Tour guide companies for bike trails, hiking and trail running*
- *Home stays and other accommodation (particularly township accommodation to provide a unique experience to tourists)*
- *Art route in townships combined with more traditional eateries, walkabout tours etc*
- *Transport providers (particularly related to public transport provision)*
- *Tours exploring unique cultural heritage within the LLM*
- *Visits to traditional healers, and icons within the community (youth programmes, environmental projects etc.*
- *Etc.*

It is also strongly recommended that the LLM tourism sector engage with the district's homestay programme.

Summary of objective 12:

Objective	Project	Actions
Facilitate the transformation of the tourism sector in the LLM	Use preferential procurement for BBBEE compliant tourism companies	Encourage BBBEE certification for relevant companies
		Develop database of compliant tourism businesses
		Develop municipal regulations on tourism related procurement
	Provide assistance / enabling environment for BBBEE tourism product development	Identify potential BBBEE product and services ownership opportunities
		Identify potential PDI champions as product owners
		Create linkages with potential product owners, and government and other agencies for assistance
		Facilitate training of new companies / staff
		Assist with marketing of BBBEE products

FOCUS AREA: CREATING AN ENABLING ENVIRONMENT FOR TOURISM IN LANGEBERG

The Tourism White Paper stresses that the role of local government in tourism development is the creation of an enabling environment for tourism development to take place. This extends towards the facilitation, coordination and stimulation of tourism product development, which should ideally be undertaken by the private sector. This focus area is therefore concentrated on objectives and related actions for the LLM to create the enabling environment for tourism development to take place. This

includes the bringing together of relevant stakeholders, the facilitation of transformation of the tourism industry in the LLM, the generation of awareness of the tourism industry, and the similar areas of intervention.

The status quo analysis found that the primary role of the municipality in tourism development is around marketing, and little attention has been given to development of the sector, to the generation of awareness etc. Importantly, there is little coordination between the three LTAs and the Robertson Wine Valley in terms of strategic planning, marketing of the LLM as a tourism destination, and addressing specific challenges in the sector. Essentially, the key stakeholders promote and develop tourism in isolation from the other towns that make up the LLM, constraining the development and marketing of the LLM as a destination, rather than a collection of towns and products. It appears that for the most part, there is a poor relationship between the LTAs and product owners, and the municipality. This is a barrier to further development of the tourism sector within the LLM.

Improved management of the tourism sector through the local government office, and improved cooperation between all stakeholders will result in cooperative decision making and strategic plans to grow the sector, and achieve the accompanying benefits, as laid out in the vision for this tourism strategy. The interventions that make up this focus are therefore designed to improve the management of the sector through the municipality in terms of interactions with stakeholders, and other considerations which will ensure an enabling environment for tourism development in the LLM.

Objective 13: Ensure institutional capacity in place to grow the LLM as a tourism destination

One of the key roles for a local municipality in tourism development is to create an enabling environment for tourism to grow through effective partnerships and communications. In order for this to be done, institutional capacity within the municipality is required, as well as strong institutions and structures outside of the municipality, within the tourism sector. The National Tourism Sector Strategy (NTSS) specifies that the two primary institutions in growing the tourism sector, is the municipality, and a Local Tourism Body (LTB), with each having specific responsibilities;

Figure 30: Local government level tourism roles and responsibilities

Tourism body	Government
LTB • Manage the information office(s) of the local area, and feed into the provincial information system • Market specific events, conferences and meetings that occur in the local area • Act as a first point of registration for tourism businesses in respect of the provincial registration system, and monitor minimum standards maintained by registered businesses in local authority area • Receive and channel applications for local road signs from members to the municipality • Promote tourism awareness, a culture of hospitality, and involvement in tourism among the local population • Keep a general watch over tourism matters, and advise the municipal authority regarding tourism development requirements	Local authority • Establish, and provide financial support to, the LTB • Upkeep and development of public tourist attractions (e.g. historical, cultural and environmental) • Provide public infrastructure • Provide public amenities, such as parking, ablution facilities and public transportation, in support of the tourism industry • Conduct spatial planning in support of tourism, and allocate land and infrastructure for tourism development • Plan and provide local road signs • Maintain the general safety, upkeep, cleanliness and beautification of the local area • Assist the LTB in implementing the provincial registration and minimum standards system by providing health and safety inspection services

Source: NTSS

The projects presented here are designed to aid in improving the institutional capacity to grow tourism in the LLM, aligned with local, provincial and national government initiatives.

Project 13.1: Improve local government capacity to drive tourism

Ensuring local government capacity is in place to drive the tourism sector, has different elements. Firstly, all councillors and officials (and residents) need to have a clear understanding of the tourism sector, its impact and functioning to enable policies, budget allocations etc. to positively influence the sector. This has been dealt with under the Human Resources focus group. The focus of this project is therefore on institutional issues. In particular the status quo analysis found that there is insufficient capacity within the Strategy and Social Development Directorate, with the manager only partly responsible for tourism issues. This means that the sole focus of the directorate has been mostly on marketing, and little on development.

According to the NTSS, the "local authority's line function departments should be responsible for all integrated development matters, including the development of tourist attractions, the provision of public amenities and infrastructure in support of tourism, and the general maintenance of the environment. These should be part of the development plan of the local authority, who should consult the LTB in the planning and implementing phases."

It was noted that the position of a tourism officer is open, with the LLM currently trying to fill this position. It is strongly recommended that this position be filled as soon as possible, with a suitably qualified person. The suggested roles and responsibilities for this official are as per the

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roles and responsibilities outlined above, liaison with stakeholders including the LEDP and LTDMP (see below), district, province etc., tourism development and marketing. It is strongly recommended that when budget allocations allow, the following staff should be appointed;

- *Tourism officer: Stakeholder liaison, tourism development, tourism office management, tourism planning, development of tourism attractions, monitoring of growth of the tourism sector etc.*
- *Tourism marketing and communications officer: Development and maintenance of all tourism marketing media, platforms. Liaison with press and marketing at road shows, and other fora.*

Project 13.2: Create a Langeberg Tourism Development & Marketing Partnership

As stated in the status quo analysis, the municipality is in the process of establishing a LEDP. The functions of this partnership is to, in parallel with municipal processes, drive local economic development.

*In order to meet with the strategic objective of creating the LLM as a destination, rather than a collection of towns working in isolation from each other (in terms of marketing, development, planning etc.), it is strongly recommended that a similar approach is taken and that a **Langeberg Tourism Development and Marketing Partnership (LTDMP)** be created to replace the existing three tourism associations. As such, it is recommended that the partnership operate in a similar fashion to the LEDP, either as a separate partnership in parallel to this LEDP, or as a function or branch of the LEDP.*

Funding for the LTDMP should be from the LLM, as it is envisaged the LEDP will be funded. Additional funds to assist with marketing of tourism and the operations of the tourism offices, can be sourced, through members, through booking commission, and through sale of merchandise.

Project 13.3: Include LLM tourism development & marketing in other planning processes

The status quo analysis has shown the importance of the tourism sector to the local Langeberg economy. It is therefore important that the objectives, projects and actions of this tourism strategy are included in other planning processes within the LLM, budget allocations etc. By placing the tourism sector on top of the local government development agenda, the municipality will be able to provide the required enabling environment for the tourism sector to grow.

Summary of objective 13:

Objective	Project	Actions
Ensure institutional framework in place to enable tourism growth in the LLM	Improve local government capacity to drive tourism	Determine capacity needs based on agreed institutional framework, roles and responsibilities
		Advertise for tourism officer position and others as identified
		Appoint tourism officer
	Create a Langeberg Tourism Development & Marketing Partnership	Agree on format, ToR, constitution etc. for LTDMP
		Agree on funding model of LTDMP
		Launch and operate LTDMP
	Include LLM tourism development & marketing in other planning processes	Align tourism with other municipal planning processes (IDP, LED, SDF etc.)
		Determine and apply for budget allocations to implement strategy

Objective 14: To regularly monitor tourism sector performance and trends

Providing actors within the tourism industry, such as product owners and tourism officials, with reliable up-to-date data and research on the tourism industry, including on the economic impact of the sector will greatly assist these actors in making business and governance decisions related to the sector. Information is a very important resource in the modern business environment and thus the provision of such information will enable economic actors to function more effectively. Furthermore, understanding the trends and visitor preferences of Langeberg tourists will allow stakeholders to better plan targeted marketing and product development.

The objective is therefore to achieve this, through the following project:

Project 14.1: Set up annual performance tracking system

It is recommended that the LLM set up and implement a performance monitoring tracking system, to assist with at least, annual tracking of the following;

- Total number of overnight and day visitors to the LLM annually*
- Profile of visitors (source country / region, age, activities engaged in, market access etc.*
- Total spend of tourists – and economic impact*
- Recommendations*

A survey based tracking system was used for the purposes of this strategy development, but this relied on estimates from tourism product owners. It is therefore suggested that each tourism product in the LLM be provided with a visitor book or access to an electronic tracking application or programme to allow regular collection of data. On at least an annual basis, this information should be collated and analysed, to provide data on performance and trends. This market intelligence should then be circulated to all tourism stakeholders to allow for planning for future years.

Summary of objective 14:

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Objective	Project	Actions
To regularly monitor tourism sector performance and trends	Set up annual performance tracking system	Design and distribute visitor data collection books / application etc.
		Distribute to all tourism stakeholders emphasising importance of data collection
		Collect, collate and analyse data annually
		Distribute findings to all stakeholders
		Adjust marketing mechanisms, strategy direction based on findings, where necessary

5.5 IMPLEMENTATION PLAN FOR THE TOURISM STRATEGY

An implementation plan identifies the projects and specific actions that make up the tourism strategy as well as identifying who has to do what by when, and what resources will be needed. An implementation plan is designed to keep the LED stakeholders on track, and therefore often includes monitoring and evaluation indicators in the action plan. The input into this will need to be completed in consultation with stakeholders, and an excel spreadsheet of all objectives, projects is attached for this purpose.

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7 APPENDIX A: LANGEBERG PRODUCT OWNER SURVEY

See attached.

8 APPENDIX B: TOURISM ASSOCIATION AND LANGEBERG WINE VALLEY QUESTIONNAIRE

Langeberg Tourism Strategy

Questionnaire for Tourism Associations

This survey will be used to complete the Langeberg Local Municipality Tourism Strategy. All information regarding this survey will be used for research purposes only and shall not be disclosed to third parties.

Tourism Association Name	
No. of years in existence	

Information regarding the Tourism Association	
Do you have a tourism office (if the answer to this question is no, please ignore the next 3 questions).	
Where is your tourism office located?	
What services does your tourism office offer to tourists?	
What are the opening days and hours of your tourism office?	
What kind of service does your LTA offer to tourism products within your area who are not members?	
What kind of services does your LTA offer to your members?	
How does your LTA source funding for your operations?	
What marketing tools does your LTA make use of (eg Facebook, website, brochures, attending trade shows, signage etc)?	
Does your LTA have a constitution? Please give information on any institutional issues, such as how often you meet, how your committee is elected etc.?	
What kind of agreements do you have with your members? (MoUs, service level agreement, etc.)	
What are the criteria for accommodation and other tourism attractions becoming a member of your LTA?	
What kind of verification is done before a tourism product becomes a member of your LTA?	
Do you confirm that the tourism product is registered with the municipality and has any relevant business licenses etc?	
What action, if any, do you take if you receive a complaint about any of your members' tourism products?	

Relationship with other tourism relevant institutions	
What kind of relationship do you have with other LTA's within the Langeberg municipality? Please explain.	

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What is the nature of your relationship between yourselves and the municipality? Please explain, and if necessary, give suggestions on how this can be improved.	
Do you have any relationships with any other tourism relevant institution? Please explain.	
Do you have any specific suggestions with regard to tourism partnerships at municipal and district level? E.g. tourism associations, forums, entities, etc.	

Tourism infrastructure – hard and soft	
What is the condition of transport networks e.g. road, rail, etc. to the Langeberg? Is this considered to be a barrier to tourism development or not, please motivate.	
Do tourism information offices (in general) function well in the LLM? Do you have any specific remarks concerning this matter?	
What is the condition of tourism signage in the LLM? How can tourism signage be improved? Any specific suggestions?	
Where should to tourism signage be positioned in the LLM and district?	
What are the opportunities for tourism supporting infrastructure development in the area focused on making the area more accessible and thus bringing more visitors to the LLM?	

The tourism enabling environment	
What are the barriers to improved tourism development within the area?	
What, in your view, is the <i>role of local government</i> in tourism development?	
What can be done by the <i>private sector</i> to promote tourism development in the area?	
How can corroboration and cooperation between LTA's, organisations, local government and local businessess be improved?	
Can you think of any <i>policies</i> that will contribute to tourism development in the LLM?	
Can you think of any <i>initiatives</i> with regard to drawing private sector investment, entrepreneurship & SMME development, etc in the LLM tourism sector?	
Is there a need for <i>tourism skills training</i> the LLM? Please motivate.	
Are you aware of any skills training initiatives in the LLM?	
Do you have any suggestions regarding tourism skills training?	
Do you think that there is a need for increased <i>awareness of tourism</i> in the LLM? Please motivate.	
Do you have any suggestions with regard to increasing tourism awareness?	

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Marketing of tourism in Langeberg	
Do you have any suggestions regarding how the LLM should be marketed or how the current marketing initiatives can be improved?	
Do you have any suggestions of how organisations, products owners, etc. can work together to market the area collaboratively as a destination?	

Thank you for your time and willingness to participate in the study. Your inputs are highly valued and will be incorporated into the tourism strategy for Langeberg.