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Abbreviations table

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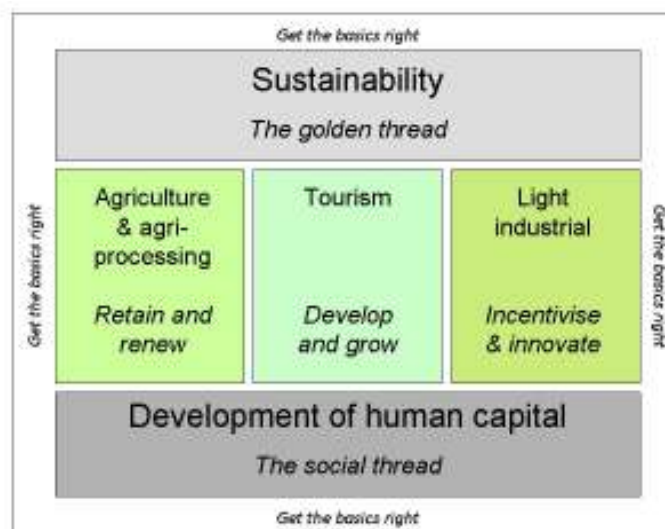
CTRU	Cape Town Routes Unlimited
DBSA	Development Bank of Southern Africa
DWEA	Department of Water and Environmental Affairs
ELF	Elgin Learning Foundation
GSI	Grabouw Sustainability Initiative
HDI	Historically disadvantaged individuals
JV	Jan Visagie, TWK Deputy-Director Economic Development and Planning
LED	Local Economic Development
LEDI	Local Economic Development Initiative
LK	Lizette Kok, TWK tourism officer
LTB	Local Tourism Bureau
SDF	Spatial Development Framework
SJ	Stephen Jacobs, TWK Municipal Chief Financial Officer
TWK	Theewaterskloof Municipality
VRP	Vintage Rail Project

Tourism Development in Theewaterskloof: A Strategic Plan

1 Introduction

In December 2009, the Theewaterskloof Municipality approved a strategy for Local Economic Development (LED). Three sectors highlighted for focused attention were tourism, light industry and agriculture/agri-processing. The development of these sectors is planned within the overarching objectives of sustainability and human capital development as depicted in the diagram below.

Figure 1: Theewaterskloof Economic Turnaround Strategy



Tourism is travel for recreational, leisure or business purposes. The World Tourism Organisation defines tourists as people who "travel to, and stay in places outside their usual environment for more than twenty-four hours and not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited."

Tourism is a key sector of the global economy. According to the Department of Trade and Industry, "Tourism is the world's largest sector, with annual revenues of almost \$500billion. In the region of 340 million people are directly and indirectly employed in tourism around the world." (DTI Sector Brochure: Tourism Sector, www.dti.gov.za/publications/tourism.htm)

While tourism development within South Africa has been somewhat less dramatic than global figures, tourism has been a consistent growth sector in the country and has performed especially well in the Western Cape. In particular, tourism is an important economic sector for the surrounding economies of Overstrand, Stellenbosch and the City of Cape Town.

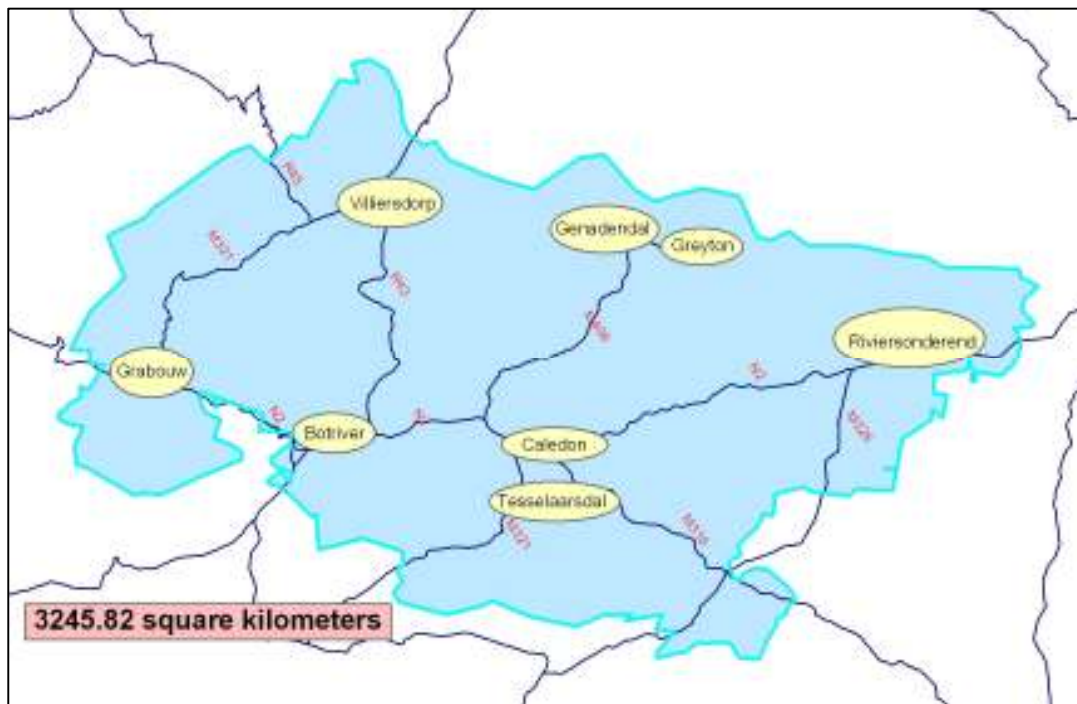
Theewaterskloof's tourism sector is a lot less established than that of its neighbours. Nonetheless, it is one of the sectors that has grown in the region. The wholesale & retail

trade, catering & accommodation sector has been one of the fastest growing sectors in the area, currently contributing R203.6 million or 13.9% of the local economy. The sector has been growing at over 5% per annum over the past 5 years. Most of this growth has been concentrated around the local tourism industry. This is reflected in the increased activity in the sector. In the last year, nine new accommodation businesses, eight new restaurants and 18 tour or support services businesses have been set up. In addition, some of the longer-established concerns report excellent growth.

Recognising the potential for stimulating the local economy and creating local jobs, the Theewaterskloof Local Economic Development Strategy called for the preparation of a Strategic Plan to guide Tourism Development within the region. This document focuses on the strategy for tourism in the region. It is drawn from a study conducted by Piers Relly commissioned by the Theewaterskloof (TWK) Municipality with funding provided by the Development Bank of South Africa (DBSA).

From a tourism perspective, TWK consists of seven principal towns identified under the LED process: Bot Rivier, Caledon, Elgin (with Grabouw), Genadendal, Greyton, Riviersonderend and Villiersdorp. (See Map below). The bulk of recent growth has focused on Elgin/Grabouw.

Figures 2: Theewaterskloof Principal Towns



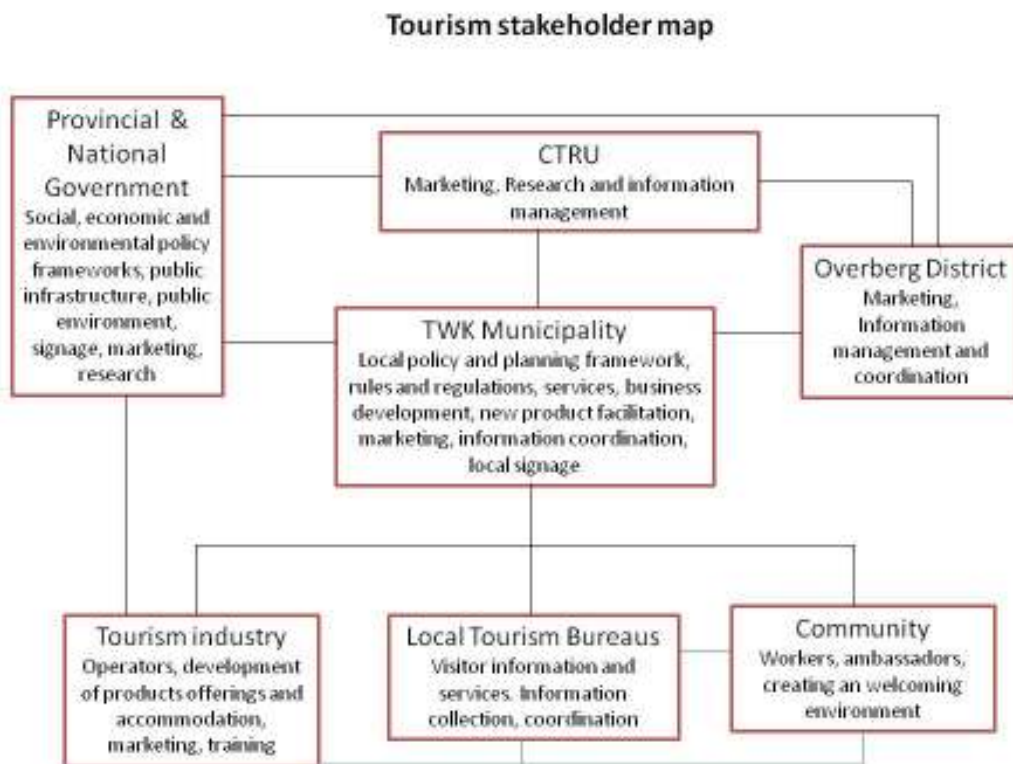
This document provides a proposed approach to development of the tourism sector in the Theewaterskloof area. Section 2 reminds us of the network of role-players whose collective and coordinated work will be necessary to make the most of TWK tourism potential. An analysis of the current situation (products, markets, facilities and amenities, and supporting infrastructure) is presented in Section 3. Sections 4 and 5 provide an overview of the key opportunities or potential for further development and the challenges that need to be addressed if the opportunities are to be realized. The heart

of the report is presented in Section 6: a strategy statement and action plan. Section 7 highlights a number of immediate actions that can gain some quick wins for tourism in the Theewaterskloof area, followed by a Conclusion in Section 8.

2 Stakeholder Map and Roles

The development of the tourism sector in Theewaterskloof largely depends on the investment and efforts of the private sector and its ability to develop competitive tourism offerings. The public sector can facilitate or inhibit this success with its interventions and actions. The diagram below provides a schematic of the different tourism stakeholders, their primary roles and the relationships between stakeholders..

Figure 3: Tourism Stakeholder Map



Government has a role in providing the social, economic and environmental policy framework, public infrastructure, the public environment, safety and security and skills training. Government also has an information role to play. This includes gathering relevant information on market trends, undertaking research into key aspects of the sector and packaging and distributing information about attractions. Assisting new businesses to respond to market opportunities and provision of aspects of education and training also fall on government, although elements of this can and should be undertaken in partnership with the private sector. Marketing is a multi-stakeholder function with government’s role focused on promoting the destination as a whole. Often this is contracted out to a special purpose agency like Cape Town Routes Unlimited.

While Government plays the key role in establishing the broader environment in which tourism entrepreneurs can work, it is the private sector that drives the development of tourism. Private entrepreneurs identify, develop and own most tourism products. Private sector also provides key tourism services: provision of accommodation, restaurants and retail facilities, tour operators and guides and elements of the transport services. And, importantly, private sector also plays a key role in the design and implementation of marketing strategies, especially at the enterprise level.

Generally the interface between the private sector and government at the local level is coordinated through local tourism bureaus. They fulfill an information, visitor services and coordination role.

The community also has an important role. A motivated, skilled, adequately remunerated, protected and productive labour force should provide consistent, high-quality, world-class service levels. The community-at-large should be encouraged to receive tourists in a hospitable manner and should be assisted to fulfill a watch-dog role with regard to their resources.

3 Situation Analysis

The potential of an area to develop as a sought after tourist destination is largely dependent on the match between the activities and resources that are offered (tourism products, visitor facilities and infrastructure) and the characteristics and desires of the potential tourist community. Ultimately, of course, the success of this match is strongly linked to effective communication and marketing: Is the potential visitor aware of what the area has to offer? This Section briefly sketches the current situation using four categories drawn from the City of Cape Town Tourism Framework, namely: tourism products, amenities, markets and infrastructure as detailed in the below.

Tourism Products ... <i>the assets that draw visitors to Theewaterskloof</i>	Tourist / Visitor Facilities and Amenities... <i>the supporting facilities that allow the visitor to have an enjoyable stay</i>
The natural, cultural and man-made attractions and resources that draw visitors to the TWK region.	The accommodation places (B&B's, guesthouses, hotels, conference facilities, etc) where visitors stay, as well as the tourist information centres, restaurants, shops, etc.
Markets... <i>the people who will visit Theewaterskloof</i>	Infrastructure ... <i>the basic services underpinning the ease and quality of the tourist experience</i>
The people who visit the area, their characteristics, opinions and the expectations they have of the tourist products, facilities and service levels.	The transport infrastructure that tourists use to travel to and within the area, as well as the road signage, landscaping, ablution facilities, cleansing services, etc.

(Based on: "Tourism Development Framework for Cape Town", City of Cape Town, 2005, Diagram p 2)

3.1 Tourism Products

The Theewaterskloof area has the potential to offer visitors an impressive range of tourism products based on special environmental qualities and natural assets; places of historical, cultural and architectural significance and interest; sporting opportunities; markets and retail facilities and a casino. This richness is reflected in the summary lists below. Significantly, these resources are not fully utilized at present and offer excellent opportunities as an expanded tourism resource.

3.1.1 Natural assets and attractions

Theewaterskloof has a rich array of natural attractions. In particular these include a unique combination of natural scenery, floral diversity and dams:

- Cape Floral Kingdom – Especially Kogelberg and Palmiet
- General Cape scenery
- The Dams: Theewaterskloof, Eikenhof, Nuweberg, Elandskloof and Palmiet
- Reserves: Seven Nature Reserves and various conservancies
- Hot Springs
- Bot River Vlei – (birding)

Theewaterskloof has not made enough of its biodiversity offerings. The absence of direct access to Kogelberg from the area is a key constraint. In general, the dams are underutilised attractions in the area. This is in part because of the limited public facilities available on each of the dams. The hot springs are well utilised. Birding opportunities in the area are also under-developed.

3.1.2 Heritage - Places of historical, cultural and architectural significance and interest.

The area also offers a wealth of heritage resources, including:

- Genadendal mission station, a recognised destination in TWK, with over 20 buildings listed as national monuments. It is also a listed national heritage site.
- The first railway station to have been constructed outside of Cape Town
- Old Cape buildings & structures
- Old Cape wagon and slave route
- Various museums including a Tractor Museum in Villiersdorp, a special interest attraction with a large number of vintage tractors and museums at Caledon and Genadendal
- Cultural experiences that accompany these i.e. home-stays & community tours with local guides, storytelling, Khoisan history, religious tourism & churches

Overall, this heritage has not been show-cased for tourism, with no existing wagon tour, un-used station buildings, few home-stays or local tours and poor connections between the Genadendal offerings and the established tourism trade in Greyton or Elgin.

3.1.3 Events, markets and retail

In addition to its natural and cultural assets, Theewaterskloof has a range of events and local products of interest to tourists, namely:

- Farm stalls and tourist shops - four located on the N2
- Local Markets – Elgin and Greyton Saturday markets, Villiersdorp night market

- Local crafts – enhanced by Elgin College’s support for garage wine, essential oils and felting
- Retail art galleries – ten in the region
- Nurseries for specialist and indigenous plants
- Music events at the Cluver Amphitheatre and Greyton Winter Festival
- Various races - Bot Rivier Barrel Race, Ex-Terra (triathlon), Cape Epic (Cycle), Apple Blossom (Cycle), National Power Boating
- Gardens - Elgin Open Gardens Festival, Greyton Rose Festival, Wild Flower Show

This is an area of growing investment and activity. Consequently the range of offerings has increased although to date there is still no signature event that has become part of the area’s branding.

3.1.4 Sporting facilities and venues

Many people visit Theewaterskloof because of the excellent sporting offerings which include:

- Various water-based sports such as canoeing and sailing.
- Mountain biking with several marked trails in the area
- Hiking
- 4 x 4 and quad bike trails
- Golf
- Fishing – river and dam
- Bird watching
- Adventure activities (kloofing, climbing, abseiling)

Theewaterskloof is a recognised sporting destination for canoeing and mountain-biking and it also has a growing adventure tourism market. There are clusters of trails around the towns but no links between the towns. This represents an opportunity for the future.

3.1.5 Gaming

Caledon is home to one of the medium-size casinos. Few of the visitors to the casino visit other tourism offerings in the area, suggesting a need for better links between the casino and other tourism players.

3.1.6 Agri-tourism

Agriculture dominates the local economy and complements tourism with several farms offering tourism experiences:

- Working farms: Some farms are open to the public and provide an opportunity to see what happens on a working farm. The area has apple, pear and other deciduous fruit, grape, rolling wheat, barley and canola fields, livestock and fynbos flower farms.
- Wine: The area is an emerging wine growing area, with several cellars and award winning wineries. It is also home to the Biodiversity Wine Route, a world first, that minimises the loss of threatened habitat and engages in sustainable wine production.
- Agri-processing: The area is home to Appletiser and has cider, brandy, malt, fruit juice, honey and essential oil businesses.
- Gardens: The area has three botanical gardens and a number of nationally and internationally known private gardens and nurseries

Historically, agricultural tourism has been a draw card, particularly for groups of international farmers. Despite its history and potential, the area does not have a coordinated agri-tourism offering and range of tours. The biodiversity wine route is an exciting initiative that could be more fully developed and aggressively marketed.

3.2 Tourist Facilities and Amenities

3.2.1 Tourist Accommodation:

Table 1, below, provides a synopsis of the accommodation, beds, restaurants and wineries in the TWK Municipality. The data was drawn from a new digi-database. Tourism business enterprises were requested to register on the site and to complete an online questionnaire. The process of registration is substantially complete, but some businesses have not registered or they are not members of the local tourism chambers. Discussions with the local tourism representatives have helped to complete the data.

Table 1: Breakdown of major tourism facilities and amenities by town

TWK - Breakdown of Major Tourism Facilities and Amenities by Town				
Town	Accommodation establishments	Beds	Restaurants	Wineries
Bot Rivier	5	51	2	5
Caledon	28	413	8	0
Elgin/ Grabouw*	37	717*	13	17
Genadendal	3	78	1	0
Greyton	50	528	12	3
Riviersonderend	10	51	3	0
Villiersdorp**	14	88*	4	7
Totals	147	1926	43	40
* Includes Houwhoek Inn beds (96 beds), located in Overstrand Municipality; and two hostels for school events (232 beds). Bed total in TWK excluding these three is 1598.				
** Excludes Dennehof beds (40 x 4 bed chalets), an Overberg Municipality-owned facility on Theewaterskloof. Operators will not send clients there due to the poor state of repair and poor condition of the cabins.				

There are around 147 accommodation establishments in TWK offering approximately 1,900 beds, or 1,600 if we exclude the hostels and Houwhoek. Many of the enterprises are B&Bs, lodges and guest houses.

A signature hotel, Daddy Long Legs, has announced it will be opening its first Old Mac Daddy Hotel in Theewaterskloof. The Hotel will consist of eco-friendly airstream units providing luxurious four-star accommodation surrounded by apple and wine farms and Kogelberg Reserve. The hotel will be child and pet friendly. Planning approvals for the exciting venture are currently underway. This initiative will attract new visitors to the area.

Most of the bed capacity is taken up during the summer school holidays and peak summer season, but winter sees a sharp drop off in occupancies. Many of the operators who are established and running at 60%+ annual occupancy are adding more rooms.

Grading of accommodation is not obligatory and the system has its critics in South Africa, but many establishments in the higher end of the market do so voluntarily for the marketing advantages. Many first time bookings, from the international market particularly, are dependent on star gradings.

Theewaterskloof has the following graded accommodation:

- 2x 5 star graded establishments (Rouxville Country House & Villa Exner)
- 11 x 4 star establishments (Mofam, Barton Villas, Wildekrans Country House, Tehillah Guest House, Porcupine Hills, De Oude Pastorie, South Hills, Black Eagle Lodge, Via's Guest House, Francolin Cottage & The Manor House at Gloria)
- 8 x 3 star establishments (Athenian Villa, Wolfkraal Farm House, Beaumont Farm Cottages, Leeuwenhof Guest House, The Post House, Tri-Active, Vredelus B&B & Chavonnes.

Another gateway to bookings is linkages with established intermediaries. Various towns seem to use different agents, as reflected in the table below, or tour operators.

Table 2: Portal Listings by Town

Town	Portfolio	Where to stay	Cape Stay	Greenwood	AA	Safari Now	SA venues	Places
Botrivier	0	1	1	3	0	0	2	1
Caledon	0	0	0	1	3	8	4	6
Elgin/ Grabouw	0	0	0	1	0	6	4	4
Greyton/ Genadendal	0	1	3	2	3	0	3	4
Riviersonderend	0	1	0	0	0	0	1	0
Villiersdorp	0	1	0	0	2	0	0	2
Total	0	4	4	7	8	14	14	20

Finally, tour operators are another gateway to bookings. There appear to be three key tour operators in the area namely:

- Hilton Ross
- Pro-Tours
- Mosaic Tours

Whatever angle one uses, it is clear that very few of the 147 establishments are listed on any of the gateways. It would appear that for many of those providing tourist accommodation, it serves as a supplementary income stream. Consequently, they have not prioritised marketing. While no accurate figures on capacity utilisation are available, it would seem that, with the exception of the larger listed accommodation, many of the establishments have low occupancy rates.

3.2.2 Weddings

There are currently 18 venues in the region that advertise and host weddings. Weddings tend to bring new customers who would not otherwise have visited the area, creating a fantastic marketing opportunity.

3.2.3 Restaurants

There are 40 restaurants in the TWK region; most of them are in Greyton and Elgin. The figure includes coffee shops and a few establishments that serve basic meals. However the area is not known for its fine dining and there is a gap in the top-end quality category. Restaurants need a level of local support to keep them profitable. However, Franschhoek has proved that enough good restaurants and fine dining experiences can create a 'product' or destination in themselves that attracts visitors from outside an area.

3.2.4 Wineries

Of the forty wineries in the TWK region, 29 are listed in the John Platter 2010 guide. The guide includes an Elgin/ Walker Bay map which reflects all of TWK except Villiersdorp. The area boasts a number of five-star and highly recommended wines from the Cluver, Beaumont and Sutherland estates. The area is also home to the world's first biodiversity wine route and has a branded wine, Slowine, based on the principles of slow living.

3.2.5 Local Tourism Bureaus (LTBs)

Provision of information to, and communication with tourists is a key element of good tourism services. Of the seven towns in Theewaterskloof, three (Bot Rivier, Genadendal and Riviersonderend) do not have tourism information offices/kiosks. Table 3, below, indicates the status of LTBs and their offices.

Table 3: Status of LTB by Town

	Bot R	Elgin	Caledon	Gen.dl	Greyton	Riv.end	Vill.drp
Has a functional LTB?	No	Yes	Yes	Yes	Yes	Partly	Yes
Has an elected representative	No	Yes	Yes	Not sure	Yes	No	Yes
Has a tourism info office	No	Yes	Yes	No	Yes	No	Yes

3.3 Tourism Markets – Who are Theewaterskloof's visitors?

If a vibrant tourism economy is based on matching the local area's tourism offerings to the target market, then it is essential to be clear on who is coming now and who might be a likely market in the future so that further product development and ongoing product advertisement and marketing are effectively targeted.

3.3.1 Who are the current visitors to Theewaterskloof?

Ideally, we would be able to say who comes, to do what, where, for how long? What do they spend, on what, what do they like... and what, if anything, would they like changed?

Unfortunately, tourism data at the municipal level is problematic. It is reliant upon product providers keeping records and sharing this information or inputting it into a collective database. This is not presently being done, but would be very useful, even as a pilot study. In the meantime, information on tourism from national, provincial and regional level guides our planning, along with the information which is available from local sources.

It is clear, however, from all sources that domestic tourism – travel by South Africans within South Africa - provides the backbone of the tourist industry nationally and locally. Research indicates that domestic tourism generates between 50% and 60% of total tourist spend. This is a good reason to pursue regional strategies built around domestic travel patterns and behaviour - and regard international tourists as a bonus. This is particularly so since the combined effect of global economics, currency fluctuations, oil price shocks and political events make the international market a far riskier one on which to base a region's tourism strategy.

From available research, the main market for the Theewaterskloof region is domestic tourists from metropolitan Cape Town. The next largest source is visitors from Gauteng. While there is also a growing market of international visitors, they are not yet a 'core' market. International visitors represent a good, but longer-term growth prospect provided the region is successfully marketed.

3.3.1.1 The Domestic Market

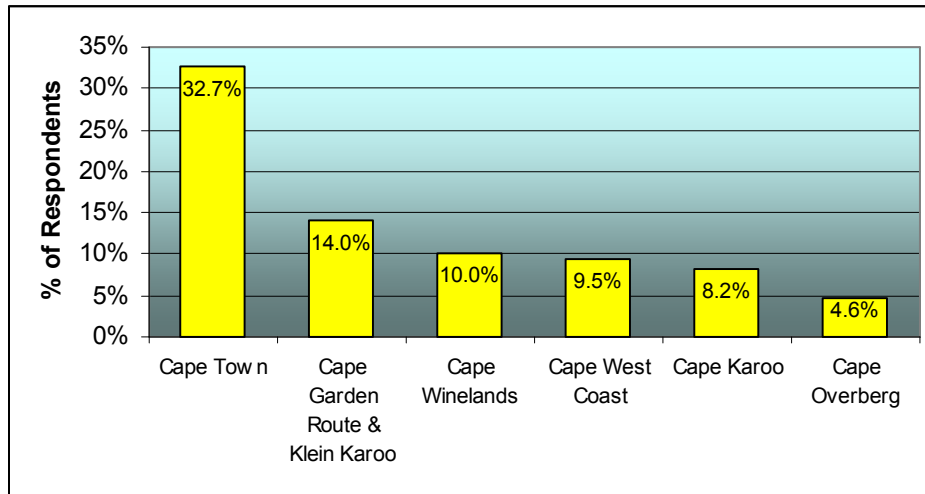
Based on research, commissioned by SA Tourism and by Cape Town Routes Unlimited, the profile of the domestic tourist in the **Western Cape** can be summarised as follows:

- From the Western Cape and Gauteng (collectively accounting for two thirds of visitors) with a seasonal spike in Summer from Gauteng and a seasonal slump from Gauteng in Winter
- Small groups of less than seven or singles or couples (account for 80-90% of visitors)
- Self-drive, using own, rented or borrowed cars
- Reliant on word of mouth and personal experience as their main information sources when making travel decisions

Their most positive experiences were friendliness & hospitality, beauty and natural environment. Throughout the year most (non-Western Cape) domestic visitors to the Western Cape found the general price levels to be more expensive than in their own province.

Overberg enjoys a small percentage of the visitors to the Western Cape. In a recent study by CTRU it was ranked as the least visited region in the Western Cape as depicted in the graph below.

Figure 4: Domestic Tourist Visits to Regions



(National sample 2,456) (Source: CTRU Western Cape Domestic Tourism Survey 2008)

The profile of the Overberg visitor is similar to that of the Western Cape visitor with two additions, most are over 50 years of age and looking for a nature getaway at a reasonable price. A secondary market is adventure seekers in the 25 – 34 year old age bracket.

The waterskloof within the Overberg

Demand side information is based on interviews with tourism operators in TWK. While it does not provide a detailed reflection of current visitors, the following survey information is available:

- The primary market is domestic visitors from the Cape Town metropolitan area
- Weekend and holiday getaways are the key motivation, followed by sporting events/ activities, weddings – particularly in Elgin
- Most of the established businesses rely on repeat customers, word of mouth and direct bookings for their bed nights sold
- Agent bookings did not feature prominently

3.3.1.2 *The International Market*

International arrivals to South Africa have tended upwards over the past several years. While the recent global financial crisis has led to a decline in overseas visitors to the country, international arrivals to South Africa have continued to rise during 2008 and 2009 as a result of the growth of African source markets. The profile of international tourists in the Western Cape varies somewhat from the country as a whole. The Western Cape receives few African sourced tourists, but holds a very large share of non-African international arrivals. These visitors generate a significant component of total tourism input to the provincial economy.

Looking more closely at some findings from research conducted by Cape Town Routes Unlimited and SA Tourism, the international tourists to the Western Cape are profiled as follows:

- The majority of international visitors to the Western Cape arrive directly from their home countries, predominantly by air, and stay in hotels (CTRU, four seasonal surveys, 2006/7)

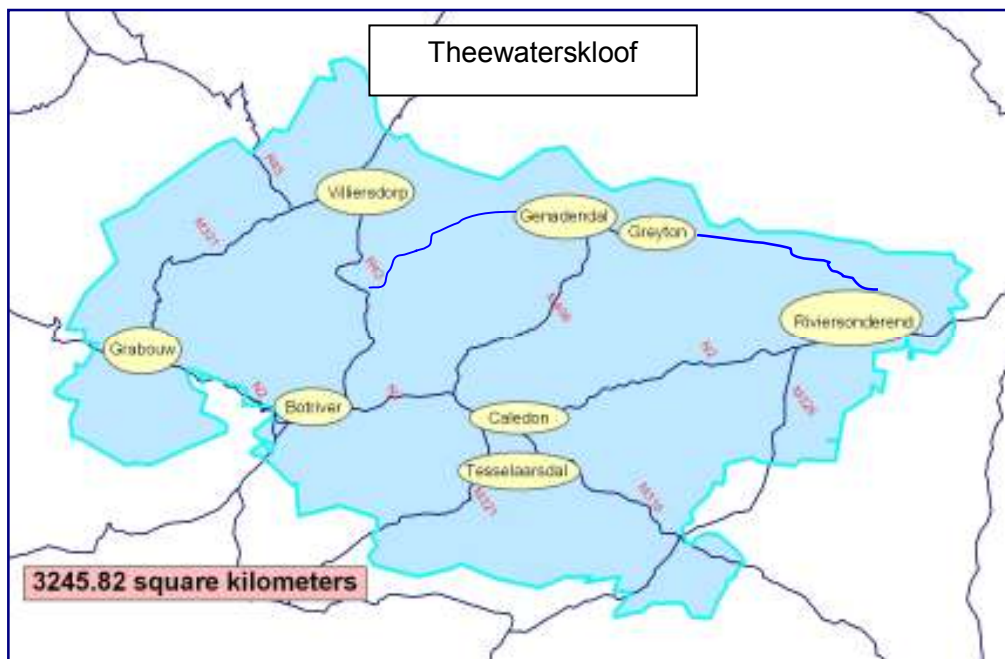
- Top six countries arriving by air, ranked highest first: UK, USA, Germany, Netherlands, France, Australia
- The Western Cape captures around 35 – 40% of total bed nights spent in South Africa by long haul (inter-continental) tourists
- Average length of stay in the Western Cape is around 12 nights (2005 figure)
- Around 92% of these visitors were single, in couples or in groups under 7 people
- The majority were self-drive - using rented and borrowed cars – and being driven by friends
- Their top interests were beaches, visiting nature attractions, scenic drives, wine & food, whale watching (in season) and flea markets. International visitors by and large were not interested in visiting spas and casinos or playing golf
- The majority used multiple sources for information gathering, but internet featured prominently
- While figures vary from quarter to quarter, in general over half of the international visitors are repeat visitors (who tend to explore new areas)
- They found restaurant prices cheaper and better value than in their home countries
- Their most positive experiences were friendliness & hospitality, beauty and natural environment

This picture for the Western Cape can be supplemented by information drawn from surveys done with Theewaterskloof's 4- and 5-star graded or equivalent ungraded accommodation establishments:

- The four and five star graded establishments tend to receive more international bookings. The tendency for international visitors to book higher graded accommodation is congruent with patterns indicated in national and provincial research findings
- A few have specifically targeted one or two international agents or markets (50% -70% of bed nights sold)
- Others receive their bookings by virtue of their star grading (10% to 20% of bed nights sold)
- Most of these had no specific marketing strategy for international tourists and rely on the SA market for 80% – 90% of their bed nights sold
- International tourists visited mainly between October and April

3.4 Infrastructure assessment

Figure 5: Theewaterskloof Main Road Network



The major gateway road to the area is the N2 national road which forms the spine of the 'Garden Route'. However the marketing of the Garden Route places strong emphasis on diverting travellers via Route 62 (through Robertson) and the Whale Route. Other than offerings along the N2, Theewaterskloof does not feature strongly in CTRU's route marketing.

The R/M321 is a key regional arterial road between Villiersdorp and Grabouw. With the exception of Theewaterskloof dam, however, tourism development along this road is limited and the area focus is largely agricultural.

In and around Elgin valley, there are small tarred roads offering scenic drives and access to the farms and tourism products, notably the Kogelberg Biosphere Reserve.

The R43 branches off from Bot Rivier south to Hermanus and carries high traffic. There are several wine farms on the route but tourism development inland is limited

The R320 from Hermanus to Caledon via the Hemel-en-Aarde Valley is being tarred in increments and will impact the routes taken by visitors into the Overstrand area.

A district gravel road running from Bot Rivier towards Villiersdorp and branching off to Genadendal, Greyton and finally Riviersonderend, has potential as a scenic agri-route.

The tarred provincial roads in the TWK are mostly in good condition and tourist access to the area is good. Other than the tarring of the R320 between Hermanus and Caledon, there are no current plans to tar other roads in TWK.

With the exception of Elgin, tourism road/route signage has not been put up in TWK and it is expected that this will be addressed in negotiation with Provincial and National Transport authorities once the tourism brand and logo have been designed and accepted.

3.5 Regional Accommodation and Dining Comparison

Theewaterskloof is surrounded by a number of established tourism destinations and brands. To the west, on the road from Villiersdorp, is Franschhoek the gourmet capital of South Africa being home to eight of the country's top 100 restaurants. To the south is Overstrand the home of whales and blue flag beaches and to the south-west is Stellenbosch known for its Cape Dutch architecture, vineyards and wines and outdoor lifestyle. It is also a university town. Also to the south-west is Cape Town, the metropolitan centre with its beaches, mountains, nature, city living and culture. All these destinations also plan to grow their tourism markets with a big focus on international visitors and for Overstrand and Stellenbosch Cape Town visitors.

Table 4 presents a comparison of accommodation and dining establishments among TWK and its neighbours: Stellenbosch, Franschhoek and Overstrand.

Table 4: Theewaterskloof - Comparison of Amenities with Neighbouring Municipalities

Region	Accommodation Establishments	Beds	Wine Farms	Restaurants	Major themes (current)
Stellenbosch	+/- 260	+/- 4,000	150	+/-160	History, food & wine, nature, architecture, university-related events
Franschhoek	110	+/- 1,600	43	37	Food & wine, nature & scenery
Overstrand	+/- 290	+/- 2,320	13	+/-100	Coast, beaches, whales, wine farms, nature & scenery
Theewaterskloof	147	+/-1,600	40	40	wine, nature & scenery, dam(s)

The main differences for and against the regions are:

- Overstrand has coast, beaches and whales as a major product differentiation and advantage
- Franschhoek and Stellenbosch have a major advantage in food & restaurants, as well as wine, in terms of numbers of farms and a long history of wine route branding. They also have depth in architectural and built heritage.
- Stellenbosch, as a university town, attracts a large number of regional and international business tourists and increasingly competes with Cape Town as a preferred destination to stay.
- Stellenbosch and Overstrand have more hotels and beds and can host bigger events

In its favour, TWK has the following:

- TWK has large bodies of fresh water and potential to be a major centre for various water sports.

- TWK has a more diverse offering of outdoor adventure activities in an area far less developed, traffic congested and crowded than its neighbours
- TWK is known throughout South Africa and internationally for its private gardens, botanical garden and plant nurseries
- Much of TWK is closer in proximity to the main transport corridor of the N2 than are most parts of the Overstrand, Stellenbosch and Franschhoek. This lends the region to more ready day stops and experiences than its regional 'competitors'. Drawing travellers off the N2 to participate in day experiences such as wine tasting, outdoor activities, retail/ shopping (farm stores), food and beverage (dining), presents a specific positioning that can be better exploited. This is in addition to expanding over night, multi-day trips into the area.

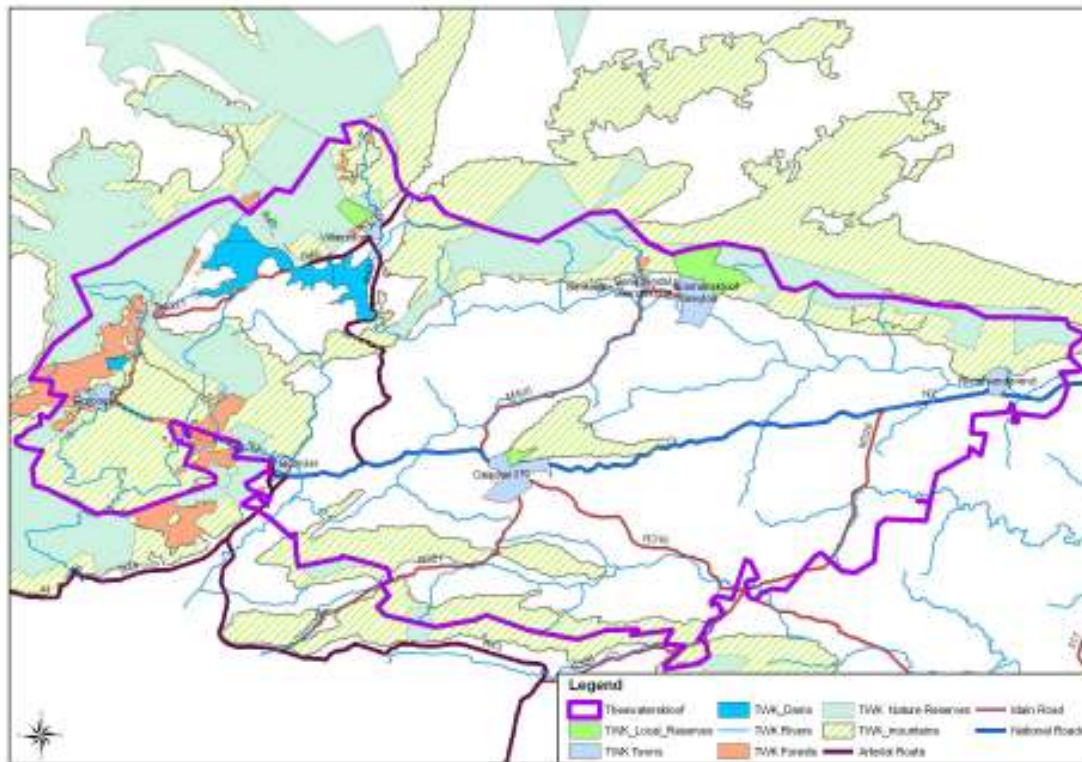
4 Opportunities: Potential for Further Tourism Development

Potential for future tourism development rests in recognising and showcasing the special resources and qualities of the TWK area, and matching them with the demands and requirements of the tourist world. Drawing from the previous sections of this report, the following market and product opportunities to support tourism development can be identified:

4.1 Nature Tourism

Theewaterskloof boasts a fantastic natural environment. There are opportunities to further capitalise on this through enhancing the current product offering. The map below reflects the major areas of natural assets. There is considerable potential for greater marketing and use of these resources. Many of these areas could be linked through an extended network of mountain bike, hiking or riding trails.

Figure 6: Theewaterskloof: Nature Reserves, Conservancies, Dams, Hot Springs, and other areas of Natural Resource



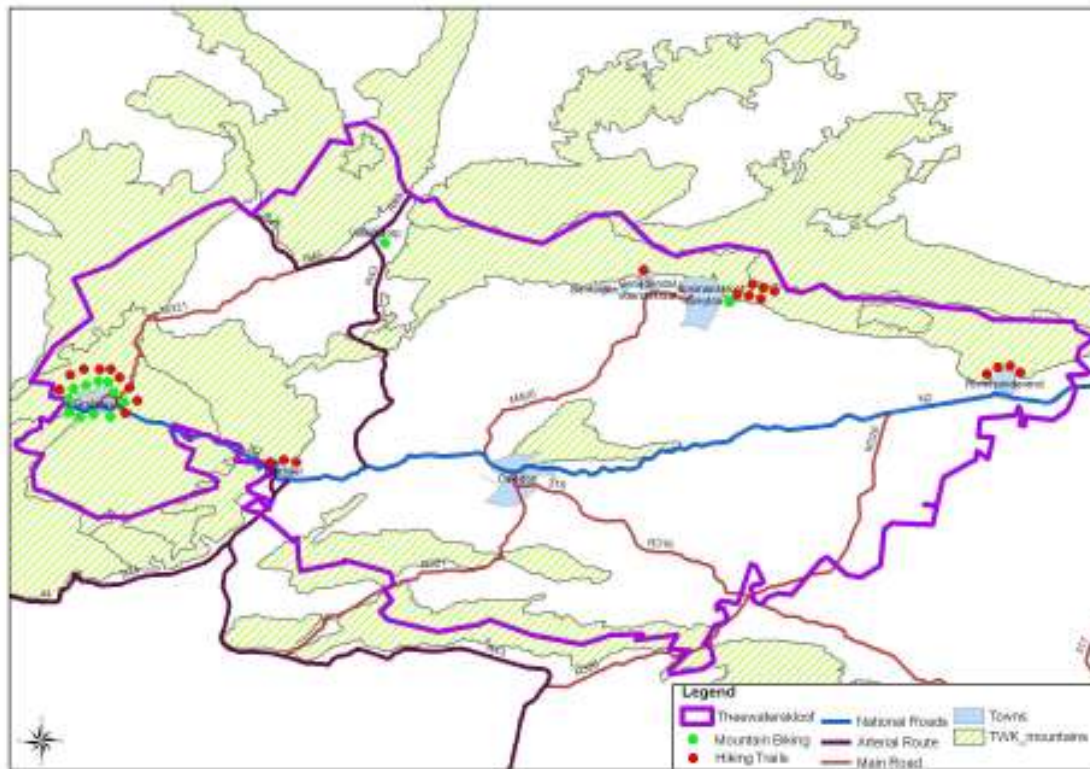
A second opportunity lies in exploiting the various dams in the area by developing more facilities on the water. There is a proposal to release a portion of land on Eikenhof Dam which will open up the dam to more people and niche tourists. While there are no current plans to do something similar on Theewaterskloof Dam, this area also has State land fronting onto the water, including a run down and underutilized accommodation venue at Dennehof.

4.2 Sport-related Tourism

TWK excels as a location for outdoor sports, including: biking, hiking, sailing and water sports, rock climbing and abseiling and other outdoor sports. A focus on these activities invites families and people of all ages to use the established trails and sporting areas. There is an opportunity to develop, brand and package adventure activities in clusters where different product owners can collaborate with accommodation providers to sell a series of activities at an all-inclusive price.

The area is already recognised as a mountain biking destination and this presents a niche market opportunity that needs to be capitalised on through developing more trails and linking these to allow riders to move from one centre to another within Theewaterskloof. The map below reflects details the existing trails – hiking and biking. It is clear these could be linked through the existing green belt offering a much more extensive trail and network of trails across most of the municipal area

Figure 7: Map of Existing Hiking and Mountain Bike Trails



Finally, the Casino is planning a golf course development. Although this should not be regarded as an anchor in its own right, the plans for the course (currently under an EIA) are to develop around 200 of the proposed 480 dwelling units as timeshare/fractional ownership which should ensure a year round occupation by tourists who consume products and participate in activities in the region.

4.3 Agri-tourism

With its recognition as one of the premier sauvignon blanc growing regions in South Africa, TWK has an opportunity to build a stronger regional brand for the wineries. At present there is a bio-diversity wine route but it does not include many of the wineries. Also, only eight of the 40 wineries are open for tastings without prior arrangement. The success of a TWK wine route is dependent on more wineries seeing the incentive to take visitors in during designated working hours.

There is also an opportunity to capitalise on the agricultural character of the area by offering visitors the opportunity to experience farm life, to participate in picking of flowers, harvesting fruit, milking a cow, or simply enjoying the farming experience with a ride on a tractor or a horse.

4.4 “Green Tourism”

The concept of ‘green tourism’ refers to both an approach to managing development of tourism resources and an attitude of a growing number of tourists world-wide. It refers to travel which is environmentally friendly; that encourages sustainable development, usually in rural areas that respects the natural environment and values sustainability and biodiversity. A ‘green tourism’ approach has been shown to successfully combine

conservation and public enjoyment of the country-side, commercial farming and land management. This is an especially appropriate strategy for TWK, given the nature of its resources, its existing commitment to sustainability and the growing global tourist demand for 'green tourism' destinations. It should also be pointed out that such an approach would also generate a living environment that would be fundamentally attractive to the professional and skilled people who are needed as permanent residents in the TWK's growing economy. This would challenge TWK to address all of its service delivery and development tasks in an environmentally progressive manner.

4.5 Heritage, History and Cultural Tourism

Theewaterskloof has a rich cultural history and could diversify its physical heritage assets, such as those at Genadendal, by promoting them in partnership with experiential attractions like culture, food, music, etc. so that a tourist can book a tour guide, home-stay and a few cultural experiences in a package.

Finally, Theewaterskloof is the home of the oldest rail station outside of Cape Town. This presents an opportunity to use the train station to draw the domestic and international train enthusiast market through setting up a vintage train route. An additional opportunity exists in linking two of the Platter-ranked 5-star wineries which along this rail line.

5 Challenges and Constraints

Tourism has already shown itself to be a relatively strong contributor to the Theewaterskloof local economy. The Situation Analysis, above, indicates that there is considerable potential for further development of Theewaterskloof's tourism potential, strengthening the local economy and providing opportunities for job creation. There are, however, a number of challenges that will need to be met if that development is to occur, and importantly, if it is to be achieved in a sustainable manner.

Key amongst these challenges are:

Information, research and planning

- Access to accurate and full information on tourism products that are currently offered (so that we know exactly what we are able to market at the moment).
- Access to accurate and full information on current visitors to Theewaterskloof: Who comes? To do what? Why? When and for how long?
- Identifying future tourism growth trends that could be compatible with the Theewaterskloof longer-term economic development objectives.
- Alignment with other planning initiatives within TWK and surrounding municipalities, as well as the wider District. This relates particularly to land use, spatial and infrastructure development planning. All of these plans have an impact on the future development of the area, the basic infrastructure delivery capacity and sense of place. Aligning planning between spheres of government

with respect to tourism and broader developmental issues will remain an important focus.

Tourism Product, facilities and amenities:

- Developing the quality and range of tourism products to take full advantage of local potential and to meet tourist demand...in an innovative and sustainable way.
- Ensuring a constantly improving quality of tourism facilities, amenities and service levels.
- Ensuring the public sector facilities (including those owned by agencies) such as museums, parks, ablutions and campsites are clean, well maintained and professionally operated.

Tourism Marketing:

- Building a 'brand' and brand identity awareness:
- Developing local, national and international awareness of the special, unique or appealing tourist experiences that the Theewaterskloof area has to offer visitors. A 2008 survey by CTRU indicated that the Overberg was the least visited of all regions in the Western Cape.
- Once tourists are in the TWK area, ensure they have easy access to full information on services, facilities and products offered throughout the municipal area.
- Overcoming the challenge of weekly and seasonal cycles of tourism.
- Effective marketing, so that the tourist world is aware of the Theewaterskloof offerings. Without sound information on local assets and products and without effective communication and coordination with other tourism bodies responsible for tourism marketing, there is little hope of effective marketing.
- Improved packaging of experiences and products to appeal to targeted niche markets

Empowerment, skills and enterprise development

- The quality of personal service is a key factor in tourist satisfaction. Addressing the challenge of low levels of literacy, general education and skills training within the Theewaterskloof region must be seen as a priority task. Education and training programmes that support inclusion of local residents in the tourism industry will have to be developed and the existing shortage of tertiary training facilities/centres in the region will need to be addressed. This would include development of a knowledge base detailing the programmes, incentives and institutions (government, private, NGOs and international donors) which can support skills development and transformation.

- Participation in the business opportunities associated with tourism needs to be broadened within the community. Training is needed in business management and development for emerging micro and small enterprises which could supply goods and services in the tourism value chain.

Infrastructure that supports tourism

- Development and maintenance of basic infrastructure that allows the efficient and sustainable development of tourism facilities and activities is essential. This means making sure that critical infrastructure is in place and that the potential negative impacts of rising numbers are anticipated and provided for so that future quality and sustainability of tourism products is assured.
- Signage: Clear and informative signage linked to the TWK brand image needs to be developed as a fundamental element of tourism infrastructure.

Institutional development and coordinated action

- Tourism is a diverse sector: coordination is complex. Communication and cooperative work amongst stakeholders is essential. Establishing and maintaining effective working links with LTBs, CTRU and other tourism-related bodies is an essential task to be addressed.

6 Strategy Statement and Action Plan

6.1 Tourism Vision for Theewaterskloof

To position Theewaterskloof as a recognised tourism destination offering unparalleled access to nature and quality country living for the whole family, on Cape Town's doorstep.

6.2 Guiding Principles

The following Policy Principles underpin the proposed Strategic Plan for Tourism Development in Theewaterskloof.

Sustainability

Sustainability is a key theme in Theewaterskloof and key principle guiding this tourism strategy.

- To be environmentally sustainable the impact of all tourism development plans must be fully assessed and carefully considered. Visual, sound, water and air pollution must be limited and the effects of these hazards on tourists and the local population must be managed.
- To be socially sustainable, host communities will be actively engaged both through opportunities to benefit from jobs and economic activity AND in the

management of the strategy, including the mitigation of any potentially negative effects.

- To be economically sustainable, Theewaterskloof will diversify opportunities, provide jobs and facilitate access to productive resources. Product development should be based on market requirements and trends.
- To be institutionally sustainable, the strategy focuses on creative partnerships between government, the private sector and civil society. Governance, which includes accountability, transparency, monitoring and evaluation, is a component of this.

Social Equity

The Tourism Strategy aims to benefit the whole community by:

- Making every effort to encourage the participation of and benefit of women, the disabled, the youth and neglected or disadvantaged groups.
- Prioritising education and training of local people for employment.

Economic Empowerment

The Tourism Strategy will be used as a development tool to enhance economic opportunities for local people, including:

- Facilitating emerging entrepreneurs, in particular SMMEs, to participate in the tourism industry
- Promoting all tourism entities to support local produce and labour.

Co-operation and Partnership

Partnerships between government, the private sector and local people will characterise the growth of tourism facilitated through the development of a multi-stakeholder tourism forum and partnership arrangements around specific projects.

6.3 Proposed Positioning

In line with the vision outlined above, tourism development in Theewaterskloof will build on its image and role as Cape Town's garden where visitors can get back to nature in style. The aim of the strategy is to increase the number and spend of tourists in the area in order to increase employment and stimulate the local economy. The critical themes will be: improved utilisation of existing accommodation, expanded accommodation offerings and the development of new experiences (including activities and attractions) to drive the accommodation growth.

The focus of tourism marketing will initially be on the South African domestic market and, within this, on the Cape Town market, with an aim to gradually increase international exposure over time.

The vision and positioning will be achieved through six strategic objectives as depicted in the diagram below and elaborated in the next section.

Figure 8: Theewaterskloof Tourism Strategy

Theewaterskloof Tourism Strategy



6.4 Strategic Action Plan

6.4.1 Information and visitor services

Objective: To provide comprehensive and accessible information and visitor services throughout the area

Historically, tourism services have been town-based and do not offer information on the wider region. By linking towns and their information, visitors' choices will be expanded, as will, hopefully, their stay and spend in the area.

In addition, comprehensive consolidated information will help to address the current under-utilisation of several tourism products.

Action	Sub-activities	Output	Date	Who
Develop a database of tourism offerings in the area, update the database and make this available via the web	Set up digi-database site	An up-to-date digi-database linked to key tourism search engines	Mar 10	TWK – LK
	Annually update the data on the site		Apr and Sept annually	LTB
	Link the listed establishments on the site/ the site to existing websites		June 10	TWK – LK

Action	Sub-activities	Output	Date	Who
	and search engines			
	Conduct a bi-annual survey of members to determine capacity utilisation and other performance measures. This would need to be a confidential survey as this is competitive information and should only be circulated as aggregated information		Sept 10	LTB
Establish area-wide website	Establish an area-wide web site linked to the existing LTB sites, CTRU, the database and relevant booking agencies and web based portals	Website	May 10	TWK and LTB
Develop maps and brochures advertising the existing tourism products in the area	Develop town-based maps with product labelling	Town maps		TWK – LK
	Develop TWK route map with attractions and accommodation	TWK route map	Sept 10	LTB
	Package products offering multi-day programmes to visitors in the area. This needs to be done in conjunction with intermediaries in order to be of relevance to potential markets.	Packages	On-going	LTB
Ensure the Local Tourism offices, staff at existing tourism establishments and at amenities in the area are able to provide excellent information to guide visitor planning and questions	Expose LTB staff to the full range of offerings in the area and train them in visitor services management	Excellent information on the area and its offerings. Staff able to support tourists' planning.	On-going	LTB
	Run a programme for staff at farm stalls, petrol stations and other key amenities to enable them to be excellent ambassadors for the area.		Launch in Aug 10 and then on-going	TWK in partnership with LTB
Institutional development	Set up LTB services in all towns	LTBs in all towns	Jun 11	TWK – LK
	Set up tourism council to coordinate the work of all the LTBs and ensure a coordinated strategy and good information sharing and flows	Tourism Council	Oct 10	TWK and LTB

6.4.2 New product development

Objective: To develop new product offerings as part of expanding the tourism opportunities and market in the area

The turnkey to increasing visitor numbers and also retaining visitors in the area for longer periods, is development of new products. Several opportunities for new product development were identified in the Local Economic Development Planning process as well as in the DBSA LEDI process. In this plan, those new products which address constraints or offer new markets are prioritised.

Action	Sub-activities	Output	Date	Who
Development of facilities on the dams	Develop an accommodation and activity facility on the Eikenhoff Dam that facilitate better exposure for the dam	Dam based facilities	Dec 11	TWK and DBSA
	Develop a facility on the TWK Dam that caters for both accommodation and family day-outings to the day		Dec 12	TWF and DWEA
Link the towns through a green belt of trails offering extended hiking and mountain biking experiences	Link the existing trails and offer a trail from Grabouw to Riversonderend	Trail and increased linkage among TWK towns	Oct 10	TWK and Cape Nature
Capitalise on the underutilised rail line and develop a Vintage Rail Project (VRP)	Develop a VRP from Elgin to Botrivier	VRP	Dec 10	TWK and Molteno
Identify the unique offerings of the area and develop and package these	Develop a sustainable/green route and product offerings	Green map	Jun 11	TWF and private sector players
	Arrange for gate into Kogelberg\$	Local access into Kogelberg	Jun 11	Cape Nature
	To expand the variety of and packaging of product clusters on offer to tourists with special focus areas being <ul style="list-style-type: none"> • agri-tourism • quench-your-thirst: wine, beer, brandy, cider tourism 	Tourism packages	On-going starting immediately	Private sector

Action	Sub-activities	Output	Date	Who
	<ul style="list-style-type: none"> • nature tourism with specific focus on plant diversity • heritage tourism with cultural experiences • activity clusters (i.e. biking and hiking trails, water activities) 			
Host an annual festival focusing on environmental richness and sustainability	Launch an annual green festival	Annual festival	Oct 10 & then annually	TWF and private sector players

6.4.3 Branding and marketing

Objective: To agree and adopt a regional brand and marketing strategy for the area that is adopted by all stakeholders and used to increase consumer awareness and visitor numbers in the area

Currently Theewaterskloof does not have a regional brand or identity. Several of the individual tourism bureaus have developed their own brands, as have some of the larger establishments in the area. The most recognised brands are Elgin and Greyton. Yet, in general brand awareness in the area is low. A recent CTRU survey suggested that Overberg had the lowest brand awareness, at just 10.2%, in the Western Cape. A single overarching brand will assist with packaging the area's offerings. It can then be presented more powerfully at local and national tourism trade meetings and fairs, and can form an integral part of a destination marketing strategy. In addition, a single brand will allow the smaller towns to benefit from the marketing efforts of larger ones. By combining efforts around a single brand and developing a comprehensive marketing plan the area will be able to increase visitor numbers.

Improved local market information is needed to inform brand development and marketing. Currently market intelligence in the area is limited, with local figures buried in District statistics or anecdotal information.

Action	Sub-activities	Output	Date	Who
Create a destination brand and marketing plan	Develop the destination brand	Destination a recognised brand	Apr 10	TWK – LK
	Develop the destination marketing plan		Apr 10	TWK – LK
	Secure stakeholder buy-in and support for brand and marketing plan		Jun 10	TWK and LTB
	Develop niche marketing plans for targeted sectors such as mountain biking and green enthusiasts		Jun 10	TWK and LTB

Action	Sub-activities	Output	Date	Who
	Develop coordinated signage strategy and improve signage in the area		Jun 10	TWK and Province
Facilitate partnerships and linkages with other marketing agencies	Establish close and effective working relations with CTRU	Partnership	Mar 10	TWK
	Establish partnerships with existing search engines to publicise the tourism offerings in the area	At least 50% of establishments linked into portals	Sept 10	TWK and LTB
	Partner with the Casino and other established brands to promote the area brand	MOU	Jul 10	TWK
	Set up area-wide tourism forum to coordinate tourism efforts and share information.	Forum	Oct 10	LTB
Expand the local market	Offer discounts and special packages to local residents on all tourism offerings to expand this market. Ensure all local Theewaterskloof residents know about new offerings and marketing positioning.	Special packages available to locals	On-going starting in Dec 10	Private Sector
Gather better data to inform marketing efforts	<p>Research and understand the current visitor profile (who are they, where are they from, what do they do in TWK, how long do they stay, how did they make their arrangements?)</p> <ul style="list-style-type: none"> • Weekend and holiday (who, from where, to do what?) • Weddings (who? from where? How long?) • Sporting events (who, from where, how long, to do what?) • Conference and training (who, from where, how long, to do what?) 	Trends information available	Dec 10	LTB, Overberg District and CTRU

6.4.4 Skills development and training

Objective: To provide training to existing and new staff especially from formerly disadvantaged communities to achieve the highest service standards while expanding local participation and career progression in the sector.

As detailed in the situational analysis, several of the existing establishments are small and survivalists or secondary income streams. Often these establishments do not have professionally trained staff. In addition, as the industry expands, so too will the local job opportunities. Currently, most of the unemployed will not be able to take up these new opportunities as they do not have the requisite skills. Targeted training is needed to ensure local people benefit from job opportunities and to ensure the provision of quality service – a key factor in visitor satisfaction.

Action	Sub-activities	Output	Date	Who
Provide training for local people to fill posts at amenities, as guides and at events	Evaluate training needs	Appropriately trained work seekers	Jan 11	Private sector and Elgin Learning Foundation
	Identify and enable relevant courses through appropriate service providers		Jan 11	ELF, THETA, service providers, CTRU
Increase the professionalism of tourism staff in the area	Work with existing tourism establishments to identify training needs	Trained staff	Sept 10	Private sector and Elgin Learning Foundation
	Identify appropriate training courses		Jan 11	ELF, CTRU, service providers

6.4.5 Transformation

Objective: To ensure the growth in the sector creates opportunities for local business, historically disadvantaged businesses and transformation of the ownership profile of the sector.

Currently, much of the goods and services required by the industry are purchased from outside the area, reducing the economic benefits to the local community. In addition, very few historically disadvantaged individuals have been able to capitalise on opportunities in the sector. As the sector grows, an explicit focus on creating opportunities for transformation and expansion of the local business base is needed.

Action	Sub-activities	Output	Date	Who
Buy-local expo	Host an annual expo to market local products to tourism business owners	Annual expo	Oct 10 and then annually	TWK
Broaden participation in the industry	Identify backward and forward linkages and economic opportunities in	Study – every 3 years	Jan 11	TWK

Action	Sub-activities	Output	Date	Who
	new product development such as train, annual expo, etc.			
	Provide training/ mentoring for local businesses to take up new opportunities identified	Training	On-going from Jan 11	TWK and Province
	Improve access for new players in the market	Facilitate package of support	Dec 10	TWK and LTB
	Facilitate partnerships between emerging and more established enterprises	Partnerships	Ongoing starting Jan 11	Private sector and Province
Transform the ownership profile of the industry	Create opportunities for equity purchases in all new mega projects, looking at employee trusts and other community structures as way of including local equity contributions in new ventures to broaden local HDI participation in the sector.	More representative industry ownership structure	On-going with annual targets set	TWK and Province

6.4.6 Enhance the local environment

Objective: To ensure appropriate policies, plans and programmes exist to facilitate sustainable development and resource use making TWK a model of sustainable living.

Sustainability and environmental integrity are increasingly becoming non-negotiable qualities for long-term success. As the area expands its tourism offerings and visitor numbers, it will also need to consciously minimise the negative impacts on the environment. Also, if the area wants to use the 'green' brand, it needs to ensure it performs in this area. The work of the Grabouw Sustainability Initiative provides an excellent platform for the area to launch itself as a "sustainable and green' destination.

Action	Sub-activities	Output	Date	Who
Develop appropriate plans and policies to manage tourism expansion sensitively	Develop a clear spatial development framework to guide tourism expansion	SDF	Sept 10	TWK – JV
	Build on the Grabouw aesthetic guidelines and develop similar guidelines for all towns	Aesthetic guidelines	Dec 11	TWK – JV
Promote	Provide information	Workshops	Ongoing	GSI and DBSA

Action	Sub-activities	Output	Date	Who
contemporary best practice with regard to energy, water and waste services and management	sessions for product owners		from Jul 10	
	Ensure all new plans passed use appropriate service systems	Critical mass of appropriate technologies	Dec 10	TWK – JV
	Develop a rates and services incentive for retrofitting appropriate service systems	Policy	Jun 11	TWK – SJ
Restore the area to its natural flora by clearing alien species. Priority areas will be areas of high bio-diversity, wetlands, water courses and areas where alien encroachment compromises the aesthetics of the area	Develop a partnership with Cape Nature and Working for Water to clear the area	Alien free area	Dec 10	TWK and private sector
	Work with private landowners to roll out a clearing programme		Apr 11	TWK and private sector
Encourage the development of 'green' products	Provide exposure and training in green product development to local businesses	Info sessions	On-going from Apr 10	GSI and DBSA

7 Quick Win Actions

In the first year the following quick win priority areas will be prioritised.

Information and Visitor Services	<ul style="list-style-type: none"> Population of the tourism product inventory and online exposure of the data Development of destination website Production of local area based tourism maps Set up Tourism Council
New Product Development	<ul style="list-style-type: none"> Area wide trail linking existing trails Vintage Rail Project launched Annual signature festival launched
Branding and Marketing	<ul style="list-style-type: none"> Destination brand adopted and in use by all parties and marketing strategy being auctioned
Training and Skills	<ul style="list-style-type: none"> Working with industry to identify training gaps and develop tourism related course offerings at Elgin College
Transformation	<ul style="list-style-type: none"> Initiate the buy-local expo Conduct first backward and forward linkages study
Enhance the environment	<ul style="list-style-type: none"> SDF guidelines finalised Policy adopted by Council to force all new plans to include solar heating and waste water management system

It is hoped these actions will immediately unlock growth in the sector, build stakeholder confidence in the strategy and plan and create the foundations for further growth.

8 Conclusion

Tourism has already shown itself to be a strong contributor to the Theewaterskloof local economy. A wealth of underutilised tourism resources offer potential to develop this sector even further, strengthening the local economy, creating new job opportunities and creating a more desirable and sustainable living environment for residents in the municipality.

The strategy and actions identified in this report provide a clear guide to the critical steps that need to be taken if the Theewaterskloof region is to benefit from its tourism potential. Critical to the success of this proposed development strategy is the full and committed involvement of all the relevant role-players.

A number of 'quick wins' have been identified which will make immediate impact while work can begin on longer-term projects to build Theewaterskloof into the recognised and successful tourist destination it can and should be.