CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

CITY OF CAPE TOWN
DEPARTMENT OF ENTERPRISE AND INVESTMENT

TOURISM DEVELOPMENT FRAMEWORK

2024

Making progress possible. Together.

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Executive Summary

Background

This Tourism Development Framework (TDF) encapsulates the tourism development strategy and implementation framework of the City of Cape Town for the period 2019-2023. The document is based on thorough desk research using available reference sources (tourism-related policies, plans, strategies and statistical research), an online survey conducted among public and private tourism stakeholders, interviews with key opinion leaders and a benchmark study of tourism strategies of four leading global tourism cities.

Progress with implementing the previous TDF has varied. Few projects were successfully implemented. While some of the key projects identified in the previous TDF, upon detailed investigation proved not to be feasible, others never progressed as planned. Reasons for such limited success may be related to a major restructuring of the City's tourism department during the period of the TDF, limited support for tourism from related departments in the City, limited human and financial resources allocated to the tourism unit and a lack of clearly defined and well-directed performance monitoring.

A thorough analysis of related legislation, policies and plans indicates that tourism growth is affected by a host of stakeholders and decisions that fall outside of the mandate of the custodian of this TDF, i.e. the Department of Enterprise and Investment. This underlines the critical importance of adopting a "whole of government" approach in managing and implementing the TDF. In addition, tourism growth is the collective domain of public sector, private sector and the community at large and the successful implementation of the TDF will largely depend on the ability of the sector to establish effective and efficient partnerships across the various tiers and components of government and between key public, private and community-based actors.

Current Tourism Situation

Tourism adds major value to Cape Town's economy and is a job intensive industry. Over the past decade the sector has directly contributed between 2% and 3.5% annually to the local economy and has directly sustained between 3% and 5% of all jobs in the city. Currently the tourism industry employs around 45,000 people directly and adding to this indirect and induced employment, the tourism economy sustains around 150,000 jobs in total. Tourism is arguably the economic sector with the best growth and employment potential in Cape Town.

An assessment of emerging global tourism growth trends suggests that the international tourism environment is fast changing and to compete with the leading tourism cities in the world Cape Town should capitalize on and stay ahead of changes in technology, consumer tastes and travel patterns, environmental management and mounting safety and security concerns. Fortunately, our magnificent city has a rich diversity of assets and features that speak to the trends highlighted in this document. The city is able to offer sustainable, authentic and varied travel experiences and destination managers should develop and manage these optimally and in accordance with market demands.

Despite this potential and major successes achieved in attracting increased international airline capacity to the city, average growth over the past five years has not lived up to expectations and the good growth achieved in 2015 and 2016 did not continue during the latter part of 2017 and into 2018. It is clear that the severe drought and water shortage experienced during Summer 2017/18 have had a negative effect on the industry. Expectations are that the industry should regain some momentum during Summer 2018/19.

The general decline in visitors' Average Length of Stay (LoS) and Real Daily Expenditure (RDE) over the past five years, coupled with continued high seasonality are of concern and need to be addressed going forward.

There is much to learn from the way other successful global tourism cities manage their tourism sectors. While cities like Barcelona and Melbourne face mounting visitor pressures due to high visitor-resident ratios, these ratios are still relatively low in Cape Town, allowing for an expansive growth approach. Tourism success factors of leading cities include a high value placed on domestic tourism, strong partnerships within government and between government and private sector, a focus on sustainable management, investment in tourism human resources and tourism budgets that allow for high brand exposure and a presence in key markets. Cape Town can improve in all these areas.

The results of the online stakeholder survey provide a good indication of challenges and opportunities facing the tourism industry in Cape Town. Stakeholders rated a number of tourism management aspects as "poor" to "average", including safety and security of tourists (poorest rating), tourism public transport, inter-departmental collaboration among tourism authorities and between tourism and other departments, public-private relationships, local community tourism awareness and involvement in tourism, seasonal spread of tourism, tourism crisis and reputation management and immigration facilities and services.

Aspects rated by stakeholders as the highest priorities for ensuring sustainable growth and development of tourism in Cape Town over the next five years are tourism safety and security (rated most important), destination reputation and brand management, tourism transportation services, leisure tourism marketing and sustainable management of Table Mountain National Park (TMNP). Other aspects prioritised are continued expansion of direct air access, collaboration with national tourism authorities, MICE marketing, improved public-private sector collaboration, improvement of public attractions, spaces and beaches and sustainable tourism management.

The situation assessment concludes with a summary of tourism Strengths, Weaknesses, Opportunities and Threats (SWOT), categorised in terms of Tourism Resources (natural, cultural and entrepreneurial), Demand Conditions, Supportive Facilities and Services and Industry Organisation and Collaboration.

Future Growth Direction

The Tourism Vision for 2024 is: "Cape Town's tourism economy will flourish, consistently recording above average growth in tourism revenues and employment and being underpinned by environmental sustainability and community support for tourism".

In pursuing this vision two broad scenarios could unfold over the next five years, namely "Moderate Growth", based on a business-as-usual approach or "High Growth", based on implementation of key interventions proposed in this TDF. The City commits to pursuing the High Growth scenario, towards achieving the ambitious vision. Under the High Growth scenario, the industry will attract R10.3 billion more in tourist expenditure per annum and sustain almost 8,000 more jobs, compared to the Moderate Growth scenario.

The following growth objectives are set for the five-year period 2019 to 2024 (mid-year):

- International tourist arrivals to increase from 1.62 million to 2.28 million.
- Domestic tourist arrivals to increase from 0.68 million to 0.83 million.
- At least 36% of tourists to arrive during the period May-September, 3.5% up from the current approximately 32,5% of visitors arriving during this period.
- International tourists' length of stay to increase from 8 to 9 nights.
- Domestic tourists' length of stay to increase from 7.4 to 8 nights.
- International visitors average daily expenditure to increase from R1,200 to R1,606 per day.
- Domestic visitors average daily expenditure to increase from R260 to R348 per day.
- Revenue from international tourism to increase from R15.6bn to R32.9bn per annum.
- Revenue from domestic tourism to increase from R1.3bn to R2.3bn per annum.
- Direct jobs sustained by the tourism industry to increase from 40,050 to 51,100.

In pursuit of these ambitious growth objectives, City of Cape Town will develop tourism anchored in three fundamental principles i.e. responsible and sustainable tourism development; maximising partnerships and a "whole of government" approach to tourism development.

The City and its partners will position Cape Town as the *Most Beautiful City in the World*, in all facets of its beauty including scenery and climate, the vineyards and wines, exceptional food experiences, art and creativity, the mountain topography, nature and outdoors, variety of conferencing facilities and settings, the coastline, marine life and beaches, the city entertainment vibe and spaces, people and cultural experiences and historical sites and heritage, among others.

Adopting this positioning holds a number of critical implications for tourism development, including the need to defend and expand the "celebrity" image and reputation that Cape Town has attained over the years; ensuring environmental and social sustainability; taking special care of tourism magnets (e.g. the Big 6 attractions, places of scenic beauty, the beaches and others); ensuring visitor comfort (safety, health, hygiene, information, mobility); striving for excellence in quality, standards, skills and innovation; expanding products to reach a greater diversity of market segments (with a special focus on inclusivity of non-traditional tourism areas such as the Cape Flats and townships); providing adequate public transport, industry transformation and ensuring that locals are aware of the importance of tourism, capitalise on tourism entrepreneurial opportunities and share in the city's tourism pride.

A special effort will be made to link the Cape Town city tourism experience with surrounding regions in the Western Cape in a "Cape Town +" proposition, to reach the maximum number of market segments.

In developing tourism, four core market segments will be targeted for growth, with their sub-segments and product preferences indicated in the larger document, namely:

- Indulgers – tourists who want to experience the finer things in life.
- Explorers – tourists who will go "off-the-beaten tourist track" to experience unusual natural and cultural phenomena.
- Specialists – tourists who are participants or spectators in special interest sport, cultural, nature and other activities.
- MICE (Meeting, Incentive, Conventions and Exhibitions) delegates.

Given the challenges and opportunities highlighted and the vision and growth ambitions adopted, the TDF will pursue five core strategic goals, namely:

1. Ensuring visitor comfort.
2. Improving and diversifying products and experiences.
3. Stimulating demand.
4. Generating community involvement and support.
5. Organizing effectively for growth.

Implementation Programmes and Activities

The City will execute the following 13 Strategic Programmes and 33 Program Activities in pursuit of the strategic goals. These are:

Goal 1: Ensuring Visitor Comfort

Strategy 1.1: Tourist Safety Program

- Developing secure tourism activity zones in higher-risk tourism areas
- Launching a City Tourist Police unit
- Strengthening tourist victim support
- Strengthening a coordinated Tourist Safety Forum and communication
- Establishing community tourism safety forums in local tourism areas

Strategy 1.2: Tourist Information Mobility Program

- Providing free Wi-Fi access at key tourist sites and congregation points
- Sending mobile welcoming and advisory messages to visitors upon arrival
- Expanding special photographic points
- Expanding the mobile Visitor Information Centre (VIC) and ambassador initiative
- Expanding tourism road signage and interpretative signage
- Continuously improving functionality and content of the www.capetown.travel website

Strategy 1.3: Tourist Transport Program

- Launching a tourist traffic improvement initiative
- Identifying and implementing a tourist transport improvement initiative

Goal 2: Improving and diversifying attractions and experiences

Strategy 2.1: Iconic Sites Improvement Program

- Assessing tourism conditions at and around existing iconic sites and sites with iconic potential
- Devising improvement plans for each site
- Continuous monitoring of conditions at iconic sites

Strategy 2.2: Sustainable Cape Town Program

- Adopting a sustainable tourism assurance scheme, for endorsement, promotion and application by the City and its partners
- Spearheading a “sustainable city” publicity initiative
- Continuing and strengthening the Universal Access in tourism initiative

Strategy 2.3: Spatial Planning Program

- Integrating local area spatial tourism concepts for high-potential developing tourism areas into the City’s spatial planning frameworks

Goal 3: Stimulating demand

Strategy 3.1: Joint Leisure Marketing Expansion program

- Formulating a collective 3-year marketing strategy
- Executing a “14 Days of Splendour” all-year-round promotion campaign
- Launching a niche market promotion drive

Strategy 3.2: Air, Rail and Cruise Access Program

- Continuing to work with and support the Cape Town Air Access Initiative and other similar initiatives

Strategy 3.3: Expanded MICE and Events Marketing Program

- Expanding MICE (Meetings, Incentives, Conventions and Exhibitions) marketing focus and resources
- Leveraging maximum tourism value from sport and cultural events

Goal 4: Generating Community Involvement, Benefits and Support

Strategy 4.1: Cultures of Cape Town Development Program

- Launching local areas cultural tourism initiative
- Setting up local Tourism Forums
- Implementing various capacity development programs in selected local areas
- Packaging and marketing cultural experiences

Strategy 4.2: Community Tourism Engagement Program

- Launching the Cape Town Tourism Schools initiative
- Launching a Tourism Employee Ambassador initiative

Goal 5: Organising for Growth

Strategy 5.1: Tourism Partnerships Program

- Engaging partners in a collective tourism marketing initiative
- Forming a City Tourism Coordinating Cluster
- Engaging in bilateral tourism development partnerships
- Coordinating Local Area Tourism initiatives

Strategy 5.2: City Tourism Capacity Enhancement Program

- Strengthening the tourism function in the City
- Collecting and analysing tourism performance statistics and research
- Increasing funding for tourism development and marketing
- Continuously monitoring progress achieved with implementing the TDF

Implementation Plan

The TDF concludes with an implementation action plan that outlines the various programs and activities, implementation timelines, lead and support implementation roles and performance success indicators.

1. Introduction

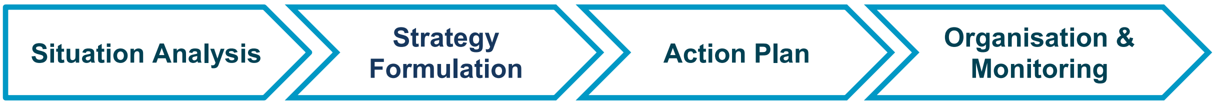
1.1 Background

This Tourism Development Framework (TDF) provides the tourism development strategy and implementation framework for the City of Cape Town for the period 2019-2024. The City will use the framework as a basis for planning its annual program of work and preparing its tourism budget for the next five years.

The document focuses on promotional and developmental growth strategies and actions for attracting more tourists[1] to Cape Town and getting them to stay longer and spend more. While the focus is on tourism, as per the United Nations World Tourism Organisation (UNWTO) definition, rather than recreational development, tourism strategies will no doubt have a positive knock-on effect on recreational opportunities and the economic injection provided by tourism growth will stimulate the overall economy and create jobs for the residents of Cape Town.

1.2 Methodology

The following strategic planning process was followed in formulating the TDF:



Various methods were applied in conducting the situation analysis, defining growth strategies and determining program priorities for the TDF, including:

- Evaluating progress achieved in implementing the existing TDF (2013-2018), based on information supplied by the Place Marketing branch in the Department of Enterprise and Investment and various departments and units in the City (See summary of results in Appendix A).
- Analysing available research and statistics, based on information provided by United Nations World Tourism Organisation (UNWTO), SA Tourism, Wesgro and Cape Town Tourism (see Appendix B).
- Conducting an online survey among the travel trade in Cape Town, which was distributed to members of Cape Town Tourism (CTT), Fedhasa (Cape) and the internal database of the City's tourism unit (See Appendix C).
- Assessing linkages and implications of existing tourism policies and plans at national, provincial and City level that may impact or have implications for the TDF (See Appendix D).
- Benchmarking the tourism strategies of 4 leading tourism cities, based on information extracted from their published strategic plans, annual reports and websites (See benchmark study in Appendix E).
- Consulting available studies and plans, as listed in the appended List of References.
- Personal interviews with key opinion leaders including the CEOs of Cape Town Tourism, Wesgro, V&A Waterfront, Table Mountain Aerial Cableway, Sanparks and key hotel groups operating in Cape Town.

1.3 Planning context

The following documents, frameworks and policies were considered in formulating the document and complement the implementation thereof.

1.3.1 Progress with previous Tourism Development Framework (TDF) 2013-2018

[1] UNWTO Definition of a tourist: "Person traveling away from their usual place of abode for longer than 24 hours, for purposes other than commuting", and Definition of Tourism: "Tourism comprises the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes."

The previous City of Cape Town TDF was anchored in three strategic focus areas, namely i) generating growth and creating jobs, ii) diversifying source markets and products and ii) support interventions. It outlined both short-term and medium-term projects that the City should implement to promote tourism development.

- Short-term priority projects listed included:
  - Responsible Tourism enhancements – awareness, awards and other incentives.
  - Increase business tourism and MICE market – a targeted marketing approach to access new growth markets such as China, India and Africa.
  - Cultural Heritage Trail with improved tourism interpretation centres and infrastructure.
  - Targeted SMME support program including access to finance, skills training, marketing support and industry networking opportunities.
  - Monwabisi Node Development – resort development, including False Bay Marathon and other activities.
  - Rail tourism: including Southern Line Rail Route and Khayelitsha Train Tour – logistics, ticketing, itinerary etc.
  - Creative tourism platform – exposing tourists to a range of creative experiences including art and crafts, dance, music and drumming, pottery, cooking classes, etc.
  - Campaign and program to promote innovation and quality among tourism businesses through awareness creation and awards.
  - Tafelberg Road market.
  - Smart information centres, including improved tourism signage, interactive kiosk in vicinity of the Modila Museum and smart phone mobile travel app for Cape Town.
- Various projects were listed in the TDF for implementation in the medium term. These included:
  - Tourism integration with District 6 planning.
  - Pedestrianising Long Street.
  - Culemborg – shipping heritage museum, accommodation potential.
  - Athlone Power Station development.
  - Old quarry and Noon-gun vernacular.
  - Harbours and beachfront development: Strand Jetty, Hout Bay Harbour, Silwerstroomstrand development.
  - Stellenbosch Bellville site: training centre, educational tourism accommodation.
  - Observatory Lower Main Road information centre.
  - Business retention and expansion programme of projects.
  - False Bay Ecology Park development.
  - Blaauwberg Conservation Area development.
  - Database of tourism products and services.
  - Tourism Safety forum.

Appendix A provides a detailed overview of progress achieved with implementing the short-term and medium-term projects listed in the previous TDF. Progress achieved in implementing the TDF can be summarized as follows:

- Short-term, priority projects:
  - Limited progress was made in implementing the ten short term, priority projects listed above.
  - No substantial progress was made in implementing seven of the ten priority projects.

  - Some progress was made in developing the Monwabisi resort node and implementing the rail tourism project.
  - While the listed projects pertaining to SMART information centres and a mobile travel app were not implemented as suggested in the TDF, substantial progress was made in reducing the number of fixed tourist information centres from 13 to five and replacing these with a mobile information kiosk, "You are Here" directional maps, interpretive signage, storyboards at key locations and improved mobility of the Cape Town Tourism website and social media pages.
- Medium-term projects:
  - Appendix A reports only on projects where some progress was made. As can be seen progress was very limited here, too.
  - No substantial progress was made in implementing seven of the 13 projects listed.
  - Conceptual plans were drafted for various areas.
  - Various visitor facilities were provided along the False Bay Coastline.
  - Substantial progress was made in proclaiming the Blaauwberg Conservation Area and providing a number of excellent visitor amenities.
  - A tourism GIS database system was developed and tested but requires funding for further implementation.
  - The City participated in the provincial and local tourism safety forum.
- Other initiatives

  In addition to the projects listed in the TDF, the City and Cape Tourism successfully implemented various other initiatives. These include:
  - Industry collaboration: The JAMMS forum was established in response to the water crisis, with participation from Wesgro, Cape Town Tourism and various private sector associations.
  - International marketing programme: Cape Town Tourism participated in various international marketing exhibitions and roadshows in key source markets.
  - Increasing domestic tourism: Cape Town Tourism implemented a winter-tourism marketing campaign.
  - Robben Island revitalization: Discussions have been initiated between the City and the Robben Island Museum to improve tourism conditions on the island.
  - Universal access: Development of an awareness campaign with posters launched to improve awareness among the travel trade and a consumer-facing UA website to provide information on UA facilities.
  - Cape Town's Military Heritage Route: was launched in association with the Simons Town Naval Base.

> Progress with implementing the previous TDF varies. Few projects were successfully implemented. While some of the key projects identified in the TDF, upon detailed investigation proved not to be feasible, others never progressed as planned. Reasons for such limited success may be related to a major restructuring of the City's tourism department during the period of the TDF, limited support for tourism from related departments in the City, limited human and financial resources allocated to the tourism unit and a lack of clearly defined and well-directed performance monitoring

1.3.2 National and provincial level policies and programmes of relevance to tourism development in Cape Town

The TDF does not stand in isolation and various legislation, policies, and plans should be considered in drafting and implementing the strategy. The following national initiatives have a direct bearing on tourism development in City of Cape Town (see **Appendix D** for a detailed overview).

- *National Tourism Act, Act 3 of 2014:* The main implication of the Act for City of Cape Town is that it compels all organs of state (of which City of Cape Town is one) to collaborate in implementing the provisions of the Act, including the national Tourism Sector Strategy. This includes maintaining a database of tourism providers and applying norms and standards of tourism business, as prescribed by the Minister.
- *National Tourism Sector Strategy (NTSS) (2017):* Sets performance targets for national tourism until 2026 with actions based on four pillars of tourism growth, namely effective marketing, facilitating ease of access, the visitor experience and destination management practices. Local Government (and by implication City of Cape Town) is mentioned as a partner under various actions, including domestic marketing, liberalizing the business environment for SMMEs, promoting public-private partnerships in management of state owned tourist facilities, developing facilities for lower LSM holiday travel, revitalizing tourist safety programmes, coordinating roles and responsibilities in executing tourism, building capacity of local government in implementing tourism development, advancing rural tourism and skills development. The NTSS also prescribes the formation of district and local tourism forums.

1.3.3 Other City policies and programmes of relevance to tourism development

The following section provides a brief outline of complementary strategies and policies that have a bearing on the TDF.

1.3.3.1 Municipal spatial development framework 2017 – 2022:

Cape Town’s Municipal Spatial Development Framework (MSDF) is a spatial interpretation of the City of Cape Town’s Integrated Development Plan and reviews the previous MSDF, which was approved in 2012. While the 2012 Cape Town SDF projected long-term growth along two northern corridors, this reviewed MSDF, informed by an evidence-based approach, proposes instead, targeted investment within an urban inner core and land use management based on inward growth.

It sets the basis for growth management in the city through four primary Spatial Transformation Areas namely a) An Urban Inner Core, b) Incremental Growth and Consolidation Areas, c) Discouraged Growth Areas and d) Critical Natural Asset Areas.

Importantly it states “the Urban Inner Core represents the priority development and investment focus for the City at a metropolitan scale. Where infrastructure needs to be upgraded and prioritised to support intensification efforts in support of spatial transformation, the budget will be prioritised. Incentives and regulatory reform will be focused on the Urban Inner Core together with co-operation and collaboration with other spheres of government and the private sector to direct the City of Cape Town’s capital budget timeously”.

1.3.3.2 Cultural Heritage Tourism Strategy and Action Plan for Cape Town (2013)

The document provides a creative framework for development and marketing of culture and heritage assets in Cape Town

- Outcome 1: Visitors encounter experiences that are “true to place‟, innovative and memorable.
    - Strategy 1.1: Establish a spatial framework for place-based cultural heritage tourism
    - Strategy 1.2: Take action to turn heritage sites and places into tourism friendly destinations
- Outcome 2: The stories of Cape Town engage and enlighten the minds and souls of visitors.
    - Strategy 2.1: Voices of the City: stories from the people of Cape Town
    - Strategy 2.2: One City many Histories
    - Strategy 2.3: A “virtual museum‟ of Cape Town
    - Strategy 2.4: Develop an integrated communication and interpretation plan
- Outcome 3: Cape Town captures market attention as a historically and culturally distinct, intriguing, high quality destination.
    - Strategy 3.1: Understand and keep track of cultural and heritage tourism markets
    - Strategy 3.2: Develop a portfolio of creative marketing tools
    - Strategy 3.3: Build advocacy amongst locals and the domestic market
    - Strategy 3.4: Market integrated destination experiences
    - Strategy 3.5: Include cultural heritage component in all tourism programmes

- Outcome 4: Cultural heritage tourism in Cape Town thrives with and through skilled people, enough money and capable organisations.
    - Strategy 4.1 Build capacity
    - Strategy 4.2 Foster partnerships & co-operation
    - Strategy 4.3 Supplementary and innovative resourcing

1.3.3.3 Guest Accommodation Policy (2010)

The document is a land use management policy to guide the effective and responsible development of guest accommodation establishments in Cape Town. The overall intended outcome of this policy is to provide coherent land use management guidelines for guest accommodation establishments with a view to facilitating appropriate land use and development.

The policy outlines development guidelines of each category of accommodation i.e. camping, bed and breakfast establishment, guesthouse, backpackers' accommodation (including boarding-house), self-catering apartments, hotel, and resort (tourist) accommodation.

It aims to create a uniform guidance framework for:

- Guiding landowners, applicants and developers in formulating proposals.
- Guiding assessors and decision makers in exercising their discretionary powers.
- Informing the current process of developing a unified Cape Town Zoning Scheme and supplementing and supporting the subsequent implementation thereof.
- Setting equitable standards across the City of Cape Town by establishing uniform assessment criteria, definitions, land use guidelines and development parameters.
- Facilitating economic development and access to economic opportunities in balance with social and environmental integrity and sustainability and facilitating orderly development.

1.3.3.4 City of Cape Town Events Policy (Policy 12329 of 2013)

The policy acknowledges the potential of events as brand builders and contributors to economic growth, job creation, social inclusivity and environmental sustainability. It recognizes the important role of the City in regulation events, providing services to events and promoting events. The City aims to establish Cape Town as a city for great events by creating stability in the events calendar and defining processes and systems that support events. It also encourages innovation and creativity in creating new events.

The policy prescribes processes to be followed by the City for providing event support and aligning practices and operations of various departments relating to commercial partnerships, issuing of event permits, coordination of the City's event calendar, event bidding, hospitality, guest management, ticketing, event marketing and event services.

The policy identifies 22 Acts and Regulations that have a bearing on the staging of events in the city and lists no less than 47 affected role players and stakeholders.

It classifies events in five categories, namely:

A. International events staged in Cape Town.
B. Cape Town Iconic events, which are synonymous with the city and attract measurable numbers of visitors to the city.
C. Incubator events, which are supported mainly by the local community, but have potential to attract tourists to Cape Town.
D. Leverage events, which are staged outside of Cape Town and in which the City participates and has the opportunity to market Cape Town.
E. Cape Town community events, which take place at community level and are attended mainly by the community.

The policy sets out guidelines for the City's support for events, including the types of events supported, criteria for evaluating the merits of events, types of funding provided, financial and legal requirements to facilitate funding, support application processes and decision-making processes for events support.

It also deals with event bidding, permitting, monitoring and evaluation of events, event research, inter-departmental coordination, hospitality at events, ticket distribution, event marketing, event services, the roles of the City structures and departments and review processes

1.3.3.5 City of Cape Town Responsible Tourism Policy (Policy C 84/11/09 of 2009)

The policy provides a framework for the management of tourism within the municipal area in a manner that supports the principles of Responsible Tourism as contained in the national White Paper on Tourism, the strategic objectives of the City and the needs of business, the community and visitors.

It states “The City of Cape Town commits to adopting Responsible Tourism as an approach to destination management to bring about positive economic, social and environmental impacts”.

The policy sets clear Responsible Tourism economic, social, environmental and management objectives and guidelines. It lists various priorities to be targeted regarding environment (water, energy, solid waste reduction), economy (procurement, enterprise development, transformation and BEE) and social development (skills development, corporate social responsibility and social development).

1.3.3.6 Other plans and frameworks of relevance to tourism

Various plans, strategies and frameworks have been developed by the City, which should be taken into account in developing tourism. These include:

- *Economic inputs and valuation of Cape Town’s coastal areas (2017):* The objectives were to estimate the value of economic activities and property value of Cape Town’s coastline, to identify strategic opportunities for enhancing the value of the coastal areas and to identify gaps in knowledge and propose interventions aimed at maximizing the economic value of the coastline. The study estimated that City of Cape Town’s (CoCT) coastline contributed approximately R40 billion to the total GDP of the CoCT and that latent economic opportunities along the CCT’s coastline have the potential to contribute an additional R51.2 billion per annum, once all the activities identified were operational.
- *District Plans (2012),* drafted for Blaauwberg District, Cape Flats District, Helderberg District, Khayelitsha District, Northern District, Southern District and Table Bay District. These are medium term plans (developed on a +/- 10 year planning frame) that are aligned to the MSDF and will guide spatial development processes within the district.
- *Tourism Precinct Plans,* which are detailed plans for specific tourism nodes. These include the Muizenberg Tourism Pedestrian Routes Study, the Langa Tourism Gateway Landscape Framework and the Pavilion Precinct Plan in the Strand.
- *Scenic Drive Network Management Plan (2003):* The overall aim and purpose of the Scenic Drive Network Plan is to identify routes which traverse areas of outstanding scenic quality in the City of Cape Town and to establish a sustainable balance between the conservation of its associated natural and built amenities and the development of its tourism and recreational potential. The plan identifies 40 scenic routes in the city and prioritises 11 of these for short term intervention, namely peninsula Main Road, Ou Kaapse Weg, Chapman’s Peak Drive, Victoria Road, Tafelberg Road, Signal Hill Road, Baden Powell Drive, Otto du Plessis Drive, Marine Drive R27, R44/Beach Road East and Sir Lowry’s Pass.

1.3.3.7 Local area tourism development plans (2018 onwards)

Each of the four local area offices has formulated a local area tourism development plan for the next TDF period. These contain a consistent portfolio of project themes, which cut across the various area plans and are adapted in accordance with local requirements and conditions. Such common programmes include:

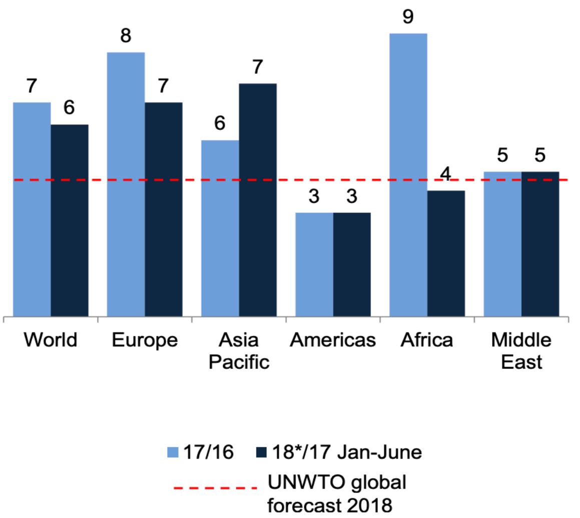
- Culture and Heritage Routes and heritage sites development: e.g. Gugulethu, Mitchells Plain, Bellville 12-Mile Mark, Muizenberg-Mnandi beach trail, Langa, Paardevlei development, as well as other areas identified in the TDF, local structure plans and the Heritage and Culture Development Framework completed by the Provincial Government of the Western Cape.
- Halal tourism experience development.
- Local Tourism Indabas and networking – also around wine, food and culture.
- Expansion of events to lesser-developed areas.
- Business and SME support programmes.
- Local tour guide training programmes.
- Improvement of tourism signage in local areas.
- Tourism awareness workshops.
- Hosting of travel media.

It is clear from this analysis of related legislation, policies and plans that tourism growth is affected by a host of stakeholders and interventions that fall outside of the core mandate of the custodian of this TDF, i.e. the Department of Enterprise and Investment. This underlines the critical importance of adopting a "whole of government" approach in managing and implementing the TDF. In addition, tourism growth is the collective domain of public sector, private and the community at large and the successful implementation of the TDF will largely depend on the ability of the sector to establish effective and efficient partnerships across the various tiers and components of government and between key public, private and community-based actors

2. Current State of Tourism

2.1. Global tourism performance and trends

Fig. 1: International tourist arrivals,



According to the United Nations World Tourism Organisation (UNWTO) global tourism has grown consistently over the past two decades and the only downswing in global tourist arrivals occurred in 2008/9, during the height of the global economic crisis. During 2017 global tourism grew exceptionally well, with tourist arrivals growing at almost 7% to 1,326 million and tourism receipts growing at almost 5% to US$1,340 billion.

Tourism to Africa grew in 2017 at higher than global average levels, with arrivals growing at almost 9% to 63 million and tourist receipts growing at almost 8% to US$37 billion. The good growth continued during the first six months of 2018, and UNWTO forecasted that international tourist arrivals should increase at around 4.9% for the year 2018.

Source: UNWTO, 2018

Cape Town is an admired global tourism city and has been declared such by various leading global travel media. As such, the city's tourism industry is affected by and should respond to travel trends that shape tourism at global level. The following are some key trends, as highlighted by United Nations World Tourism Organisation (http://www.unwto.org), Skift (www.skift.com), Intrepid Travel (https://www.intrepidtravel.com) and others.

Global trend	Implications for Cape Town
• **Sustainability goes mainstream** Exponential environmental awareness – global warming, environmental threats and destruction in travellers' faces. Global Sustainable Development Goals increasingly steering tourism objectives.	Cape Town has done well in adopting the Responsible Tourism Policy. Positioning Cape Town as a sustainable tourism city should be further strengthened and communicated as being at the core of the brand.
• **Mobile technology rules travel** The connected traveller – visitors use mobile phones at all stages of the travel journey. Could be our best or worst marketers and an attractive product or experience will promote or demote itself.	Visitor mobility should be continuously enhanced and visitors should be able to remain connected to the internet to explore more and share their Cape Town experiences. Online visitor comfort should be non-negotiable.
• **Crisis is the new norm**	Collaboration and coordination among tourism and security authorities should be strengthened

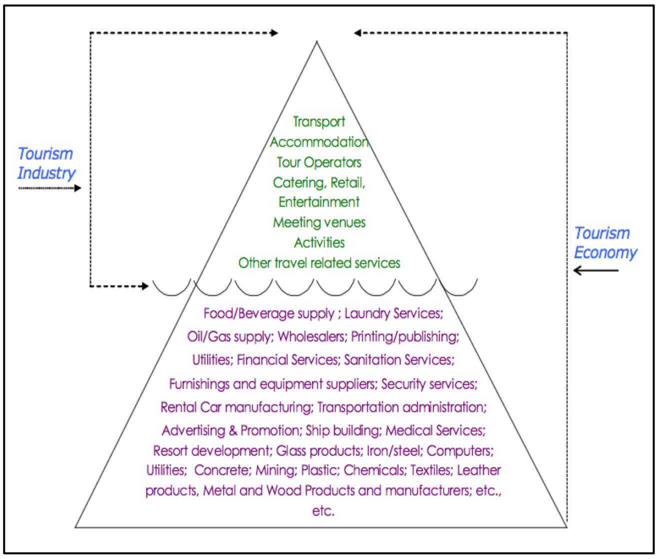
Global trend	Implications for Cape Town
A world of fear and distrust – visitor safety, security and health paramount and ability to manage crises will become increasingly important.	and a crisis communication strategy set in action.
• **Travel as a mechanism for family bonding** Family travel and intergenerational travel increasing. Travel regarded as an opportunity to bond in a fast-paced world. Special needs of older travellers'.	Opportunities for family travel should be promoted and development of children's activities and experiences supported. Universal Access should be further promoted and enhanced.
• **The Millennial travel bug** Growth throughout but especially fast growing in emerging Asian market - live it now, share it now, instant gratification.	The creative vibe of the city and safe nightlife zones should be enhanced. Special value offers should be structured, especially during slower season.
• **Growth of the shared economy** Disruptions in accommodation, transport, dining, etc.; destinations that embrace these have competitive advantage, associated challenges.	Cape Town should embrace the shared economy and the City should develop clear guidelines for ensuring consumer protection and competitive order in the industry, without discouraging growth.
• **Personalisation and authenticity valued** Travel has become a commodity – people have been everywhere and "specialness" is a relative concept. Special attention, authentic experiences and tailored service offering are increasingly expected and valued and luxury travel gaining ground.	Cape Town's multi-cultural society offers major opportunity for personalised, interactive travel experiences. Cultural tourism and safe interactions with the City's culturally diverse citizens should be encouraged.
• **Increasingly segmented markets** As people become more travelled the search for experiences that suit their specific tastes increases – needs fine-tuning of experiences to segment needs.	Cape Town Tourism should be well versed in understanding the needs of existing and emerging market segments, communicating these to the industry and informing CCT development policies.
• **Geographic market shifts** Asia and China increasingly maturing and sophisticated in travel needs; Russia has grown well.	Cape Town Tourism should further strengthen and enhance its marketing relationships and partnerships with Wesgro and SAT to enter such growth markets.
• **Time as a travel currency** Leisure time is increasingly precious – transparency and ease of travel planning, booking transport, etc.	Tourist public transport, traffic systems, parking, pedestrian movement and access to ICT should be continuously improved.

The international tourism environment is fast changing and to compete with leading destination cities in the world Cape Town should capitalize on emerging growth trends. Fortunately, our magnificent city has a rich diversity of assets and features that speak to the trends highlighted above. The city is able to offer sustainable, authentic and varied travel experiences and destination managers should develop and manage these optimally and in accordance with market demands.

2.2. Importance of the Tourism Sector in Cape Town

Tourism is a cornerstone of the local economy, together with services and manufacturing. The City recognizes that:

- Investment in tourism could reap substantial local economic and social benefits
- Tourism expenditure filters through the local economy and benefits not only direct tourism providers but also many other related services, suppliers and the community at large
- A growing tourism industry offers business opportunities for large and smaller, community-based entrepreneurs such as tour guides, restaurateurs, accommodation providers, activity providers and many more.
- As such, tourism has proven to be an excellent vehicle for Broad Based Black Economic Empowerment (BBEE)



- Tourism is employment intensive and creates employment at all skills levels, from unskilled to management level.

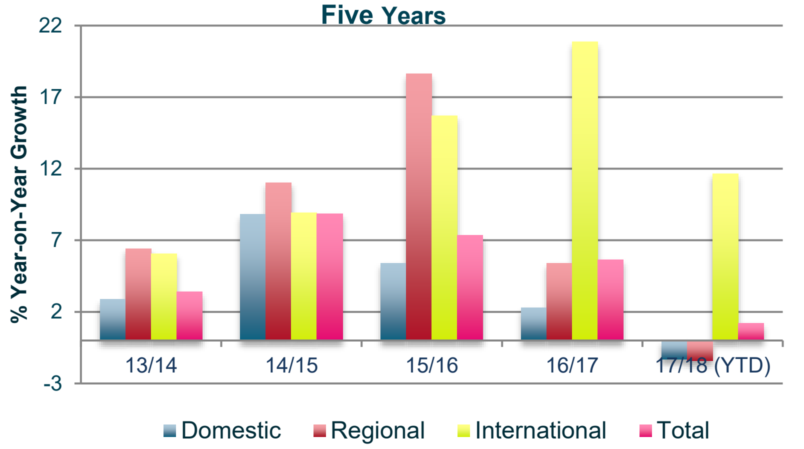
Tourism adds major value to the Cape Town economy and is a job intensive industry. Over the past decade the sector has contributed between 2% and 3.5% annually to the local economy and has directly sustained between 3% and 5% of all jobs in the city. Currently the tourism industry employs around 45,000 people directly and the direct, indirect and induced tourism economy sustains around 150,000 jobs in total. Tourism is arguably the economic sector with the best growth and employment potential in Cape Town.

2.3. Recent Performance

Appendix B provides a detailed analysis of indicators of tourism performance over the past five years and beyond. The following key performance trends are evident:

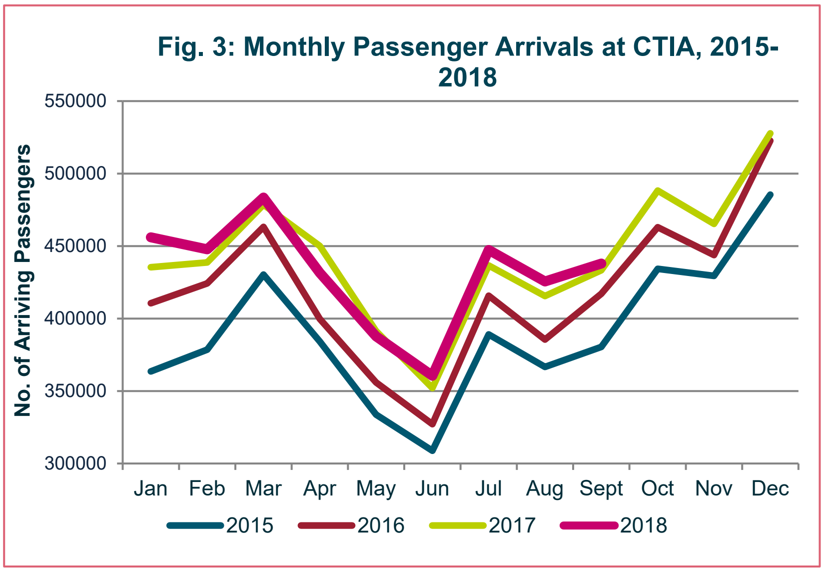
Major successes have been achieved over the past three years in luring global airlines to fly directly to Cape Town International Airport. Since its inception in July 2015 the Cape Town Air Access (CTAA) initiative has contributed towards landing 13 new routes and 18 route expansions at Cape Town International Airport (CTIA), doubling international seat capacity at the airport by adding 750 000 inbound seats, leading to 16% international terminal passenger growth in 2016 and 20% growth in 2017.

Fig. 2: Growth in Passenger Arrivals at CTIA last Five Years



Despite the CTAA successes, tourism growth has fluctuated substantially over the past five years and the sector suffers from inconsistent growth in tourist arrivals and declining tourism economic and employment yields, as is evident from the following indicators:

- Tourism Gross Value Add (GVA) declined substantially between 2011 and 2016 and while all indications are that the tourism economy recovered well between 2015 and 2017, the industry has been struggling since the onset of the water crisis in late 2017.
- Although good growth was achieved in total passenger arrivals at Cape Town international Airport from 2015 to late 2017 and excellent growth has been achieved in international arrivals, total arrivals have largely stagnated between January and September 2018 with only 1.2% Year-on-Year growth recorded.



- While the growth in international passenger arrivals is commendable, the increased international seat capacity has impacted on domestic arrivals, with the reduction in international passengers on domestic flights from Johannesburg reflected in the low domestic passenger growth.
- Visitor figures of major attractions have shown good growth from 2016 to mid-2017, followed by a significant slowdown in visitation, back to 2016 levels. August 2018 reflects some potential recovery.

- Hotel occupancy levels grew well from late 2015 until mid-2017, but stagnated during 2017 peak season with hotels experiencing a decline in both occupancies and revenue from March 2018 onwards. There seems to have been some recovery since September 2018, although at the time of producing this report no figures had been released for the 2018/19-summer season.

In summary:

Tourism is already a major economic and employment generator for Cape Town and has the potential of being an even greater driver of economic growth and job creation in the city.

Despite major successes achieved in attracting increased international airline capacity to the city, average growth over the past five years has not lived up to expectations and the good growth achieved in 2015 and 2016 did not continue during the latter part of 2017 and into 2018. It is clear that the severe drought and water shortages experienced during Summer 2017/18 have had a negative effect on the industry. Expectations are that the industry will regain some momentum during Summer 2018/19.

The general reduction in visitors' Average Length of Stay (LoS) and Real Daily Expenditure (RDE) over the past five years, coupled with continued high seasonality are of concern and need to be addressed going forward.

2.4. Benchmarking lessons from leading global tourism cities

Appendix E presents a benchmark study of the tourism strategies and plans of four leading global tourism cities, namely Durban, Melbourne, Vancouver and Barcelona.

The key lessons gleaned from this analysis and implications for Cape Town can be summarised as follows:

- *They accommodate and manage large numbers of visitors in a strategic manner:* Cape Town's visitor-citizen ratio is still very low when compared to the benchmarked destinations.
- *The domestic market remains the cornerstone of tourism success in key destinations:* Cape Town's share of the South African domestic tourism market remains low and the city receives fewer than 700,000 domestic visitors per annum.
- *Their level of tourism investment and capacity acknowledges the economic force and importance of tourism:* Tourism budgets of Cape Town and the Western Cape tourism authorities are wholly insufficient when compared to the budgets of the benchmarked cities.
- *Tourism is managed through a "Whole of Government" approach*: The status and positioning of the tourism unit in the City of Cape Town is currently unclear and the unit's power and mandate seems inadequate to coordinate and guide the strategies of a range of partners.
- *Tourism is acknowledged and treated as specialised area of work and requiring specialised staffing and implementation agencies.* In Cape Town, the City's tourism unit has very limited resources, Cape Town Tourism has a narrow mandate and tourism is one of several functions of Wesgro, the provincial trade, investment and tourism agency, with a very small tourism budget compared to leading world tourism regions.
- *There is synergy and coordination at geographical levels:* operational partnerships between Cape Town Tourism, Wesgro and other tourism organisations in the province are relative weak and collaborations should be strengthened.
- *They realise that local citizens are part and parcel of the tourism destination experience:* While the City of Cape Town has devolved tourism to area level, implementation of local level tourism plans has lagged and tourism demand remains heavily skewed towards traditional tourism areas.
- *They value a strategic, visionary and sustainable tourism development approach:* This updated TDF sets the strategic direction; however the TDF lacks a spatial (geographical) dimension for expanding tourism in a prioritised manner. There exists no comprehensive destination development strategy at provincial level.
- *Research and measurement are key components of the strategy:* While substantial research has been conducted by City of Cape Town and Cape Town Tourism, there is need for a coordinated research and performance monitoring strategy.

There is much to learn from the way other successful global tourism cities manage their tourism sectors. While cities like Barcelona and Melbourne face huge visitor pressures due to high visitor-resident ratios, these ratios are still relatively low in Cape Town, allowing for an expansive growth approach. Tourism success factors of leading cities include a high value placed on domestic tourism, strong partnerships within government and between government and private sector, a focus on sustainable management, investment in tourism human resources and tourism budgets that allow for high brand exposure and a presence in key markets. Cape Town can improve in all these areas.

2.5. Industry views regarding success factors for tourism growth

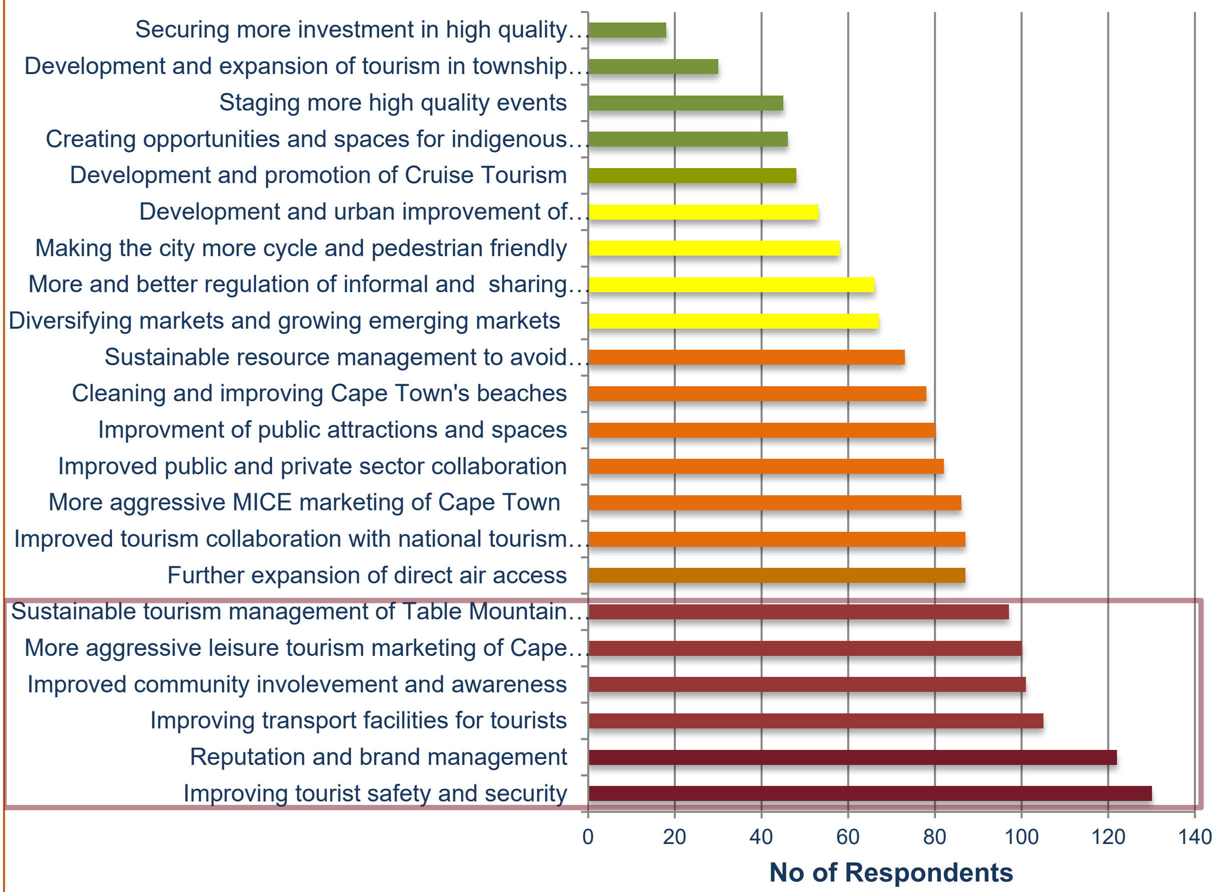
Appendix C presents the results of an online survey, which was undertaken to assess stakeholder perceptions regarding challenges and opportunities facing the industry over the next five years. A good response rate was achieved with more than 150 industry stakeholders completing the survey, the majority of which were private tourism businesses. The following are summarised results of their views regarding current performance and importance of addressing various tourism management aspects.

- When asked how they would rate various key aspects of the Cape Town tourism value chain, the following aspects were on average rated as *Poor to Average:*
  - Immigration facilities and services

- Tourism crisis and reputation management
- Seasonal spread of tourism
- Local community tourism awareness and involvement
- Public-private relationships
- Inter-departmental collaboration
- Tourism public transport
- Safety and security of tourists (lowest rating)

- When asked how important they would rate various potential initiatives towards ensuring sustainable growth and development of tourism in Cape Town over the next five years, the following aspects were rated as *Critically Important*:
  - By 100-130 out of 144 respondents who answered this question (High Priority)
    - Tourism safety and security (rated most important)
    - Destination reputation and brand management
    - Tourism transportation services
    - Leisure marketing
    - Sustainable management of TMNP
  - By 70-99 out of 144 respondents who answered this question (Priority)
    - Further expansion of direct air access
    - Collaboration with national tourism authorities
    - MICE marketing
    - Public-private sector collaboration
    - Improvement of public attractions, spaces and beaches
    - Sustainable/responsible tourism management

Fig. 4: Rating of Initiatives as "Critically Important" for Sustainable Tourism Growth in Cape Town (n=142)



More than half or respondents also made suggestions regarding tourism improvement and these covered the following topics (see Appendix for details).

- Safety / removal of beggars and illegal structures (27)
- Better and more destination marketing (12)
- Reputation management re water access/sustainability plans (8)
- Expanding sport and cultural events and conferences (7)
- Regulating accommodation (5)
- E-tourism (3)
- Recruitment and job creation (3)
- Diversifying to become an all-year destination
- Business laws and regulations (1)
- Air/transport/infrastructure improvement (12)
- Better management/development of key attractions, especially Robben Island (8)
- Visas/easier access (8)
- Adventure/ food/ eco-tourism /other (6)
- Community involvement and education (4)
- Cultural tourism (3)
- Collaboration / support CTT (2)
- Illegal guide control (1)

The results of the stakeholder survey provide a good indication of challenges and opportunities facing the tourism industry in Cape Town. Tourism is, after all, a private sector driven industry and the role of Government is to create an environment in which private businesses can flourish in a sustainable and socially equitable manner. Listening to the private sector, responding to their needs and collaborating with them in finding solutions are keys to the future tourism success of the city.

2.6. Summary of key tourism growth opportunities and challenges

Strengths and Opportunities	Weaknesses and Threats
Natural, Cultural and Entrepreneurial Resources	
• Exceptional diversity of natural and cultural features and experiences • Enjoyable urban spaces – V&A, CBD, etc. • Well-conserved nature areas, especially Table Mountain National Park (TMNP) • Good quality of beaches • Well-run tourism facilities and attractions • Cultural innovation and creativity • City and surrounding regions a powerful combination of resources • Vineyards and wine routes within borders	• Perceived and real safety concerns • Combination of "crime, grime & harassment" in some tourist areas • Traffic congestion at key tourism points • Visitor pressure at key points during peak season • Continued threat of water shortages • Substantial section of the population not aware of value and benefits of tourism • Tourism development geographically skewed
Demand Conditions	
• Cape Town has a good tourism brand reputation built up over many years • Good and growing direct international air access • Resurgence in visitor numbers 2015- mid 2017	• Fluctuating demand and visitor growth momentum lost in 2018 • Cape Town is a long haul destination resulting in high travel costs and time pressures on travellers • Reputation and brand has been damaged through water and safety concerns

Strengths and Opportunities	Weaknesses and Threats
• Product suitable for capitalising on growing market segments e.g. experiential travel, millennial travel, food and lifestyle lovers, independent touring, luxury travel, cruise tourism, etc. • MICE has grown well an Cape Town is an international MICE contender	• Demand remains highly seasonal • Declining length of stay and stagnating visitor spend • Small share of the domestic market • MICE potential not maximised • Heavy reliance on traditional Western source markets
Supportive facilities and Services	
• Excellent range and quality of accommodation • Airport of high quality and expanding • World class convention and conference facilities and services • High quality and affordable food and dining experiences • Excellent range and quality of sport and cultural events	• Public transport not optimised for tourism • Immigration services do not always cope with demand • Road and parking infrastructure insufficient at some key points • Safety and security services lacking at some tourist hotspots • Concerns over impact of sharing economy
Industry Organisation and Collaboration	
• Well-functioning tourism agencies and committed public and private sector officials • JAMMS initiative has fostered public and private cooperation • Joint communication campaign launched in response of water crisis • Private sector well organised through CTT, Fedhasa, Satsa • CTT's membership model a leading example of PPP tourism organisation	• Duplication of effort and resources in leisure marketing between CTT and Wesgro • No coherent tourism strategy among the various parties • Both Wesgro and CTT underfunded and spend very limited funds on tourism marketing • Budget uncertainty at CTT prevents medium term planning • Limited trust between public and private sectors • Limited cross-departmental tourism coordination in CCT • Poor tourism implementation record at area level

3. Future Growth Direction

The following section sets out a five-year tourism vision, low and high-growth scenarios, measurable growth objectives, development principles and competitive foundations related to market positioning and target market segments.

3.1. Vision 2023

Cape Town's tourism economy will flourish, consistently recording above-average[2] growth in tourism revenues and employment and being underpinned by environmental sustainability and community support for tourism

[2] Compared to national growth as measured by SAT

3.2. Growth Scenarios

As can be seen from the historical performance analysis, tourism growth has been inconsistent over the past five years. Two broad scenarios could unfold over the next five years, namely “Moderate Growth” or “High Growth”.

Moderate Growth Scenario	**High Growth Scenario**
The moderate average growth achieved over the past five years will continue, with:	Tourism will achieve exceptionally good growth, with:
• International arrivals increasing at a compound annual growth rate (CAGR) of 2% p.a.	• International arrivals increasing at a compound annual growth rate (CAGR) of 7% p.a.
• Domestic arrivals increasing at a compound annual growth rate (CAGR) 1% p.a.	• Domestic arrivals increasing at a compound annual growth rate (CAGR) 4% p.a.
• No change in average length of stay of 8 days	• Average length of stay increases from 8 to 9 days
• Tourist expenditure per day increases with inflation	• Tourist expenditure per day increases with inflation

The assumptions underpinning each of these are as follows:

• No major additional tourism marketing and product investment by the City	• City of Cape Town substantially increases its investment in tourism human resources and funding
• Limited support and coordination from other sectors in City	• Tourism has a strong mandate to coordinate with other sectors in the City and support is forthcoming
• Perceptions and incidents of safety and water shortages not effectively addressed	• Perceptions and incidents of safety and water shortages affectively addressed
• Limited collaboration and pooling of resources at provincial and local level	• High level of collaboration and pooling of resources within City and between provincial and local tourism authorities
• Demand for and sustainability of international air capacity tenuous and inconsistent	• Demand for and sustainability of international air capacity increases consistently

The implications of the two scenarios can be summarized as follows:

Indicators	**2 018**	**2023**		
		Under Moderate Growth	Under High Growth	Difference p.a.
Foreign Tourists	1 623 737	1 792 736	2 277 375	484 638
Domestic Tourists	683 824	718 706	831 976	113 271
Length of Stay Foreign	8.0	8.0	9.0	1.0
Length of Stay Domestic	7.4	7.4	8.0	0.6
Bednights Foreign	12 989 893	14 341 891	20 496 371	6 154 480

Indicators	2 018	2023		
		Under Moderate Growth	Under High Growth	Difference p.a.
Bednights Domestic	5 060 298	5 318 424	6 655 812	1 337 388
Spend/day Foreign	1 200	1 606	1 606	0
Spend/Day Domestic	260	348	348	0
Spend Foreign (Rbn)	15.6	23.0	32.9	9.9
Spend Domestic (Rbn)	1.3	1.9	2.3	0.5
Total Tourist Expenditure (Rbn)	**16.9**	**24.9**	**35.2**	**10.3**
Direct Employment	**40 051**	**43 146**	**51 116**	**7 970**

The City commits to pursuing the High Growth scenario over the next five years, towards achieving the ambitious growth Vision 2023. Under the High Growth scenario, compared to the Moderate Growth scenario the industry will attract R10.3 billion p.a. more in tourist expenditure and sustain almost 8,000 more jobs.

3.3. Growth objectives

Based on the High Growth scenario, the following growth objectives are set for the period of the TDF:

- Tourism arrivals:
  - International tourist arrivals to increase at an average 7% per annum from 1.62 million to 2.28 million.
  - Domestic tourist arrivals to increase at an average 4% per annum from 0.68 million to 0.83 million.
  - Seasonality of arrivals: At least 36% of tourists arrive during the period May-September, 3.5% up from the current approximately 32,5% of visitor during that period.
- Average length of stay:
  - International tourists' length of stay to increase from 8 to 9 nights.
  - Domestic tourists' length of stay to increase from 7.4 to 8 nights.
- Daily expenditure per visitor (to increase according to expected inflation rate - assume 6% p.a.):
  - International visitors' daily expenditure to increase from R1,200 to R1,606 per day.
  - Domestic visitors' daily expenditure to increase from R260 to R348 per day.
- Total direct tourism revenue:
  - From international tourism to increase from R15.6bn to R32.9bn per annum.
  - Domestic: From R1.3bn to R2.3bn per annum.
- Direct jobs sustained by the tourism industry:
  - To increase from 40,050 to 51,100 per annum.

3.4. Development Principles

In pursuit of these ambitious growth objectives, City of Cape Town will develop its tourism sector anchored in the following principles:

Responsible tourism development

Cape Town will further strengthen the global leadership role it has taken with the Cape Town Declaration on Responsible Tourism (2002) and subsequent Responsible Tourism initiatives during the FIFA World Cup and beyond. This principle entails striving for:

- Environmental sustainability, which should underpin all development decisions and industry operations.
- Social equity, by duly considering the interests of local residents in developing tourism, especially those in need of entrepreneurial and employment opportunities.
- Economic viability, striving for the best tourism yields per visitor by maximizing visitor expenditure and reducing leakage of tourism revenues from the local economy.

Maximising partnerships

While the City will play a leadership role in setting the tourism direction, tourism value is created by a range of parties and true partnerships among role-players is key to the success of the industry. In accordance with the White Paper on Tourism (1996), this implies a tourism strategy that is:

- Government led, with the City providing the strategic direction, destination management and marketing support, infrastructure and public services for tourism to happen in a balanced manner.
- Private sector driven, with the private sector investing in and operating in a competitive manner tourism commercial facilities and services.
- Community based, with local communities hosting tourists in a safe and hospitable manner and benefitting from tourism proceeds.

Whole of Government approach

Within the City, departments other than tourism provide most services underpinning tourism growth and Cape Town and the Western Cape is an integrated destination. This requires:

- Partnership within the City: A variety of departments in the City are key partners for implementing the strategy. These include transport, public safety, roads, culture development and others. Formalized, strong partnerships will be forged between tourism and other relevant departments in the City.
- Partnership between City and other tiers and agencies of government: The delivery of tourism infrastructure, destination marketing and management of key attractions such as Table Mountain National Park, Robben Island and Kirstenbosch Botanical Garden are mandated to other organisations at provincial and national level and the City will forge strong partnerships with relevant provincial and national organisations in implementing this TDF.

3.5. Competitive Foundations

In growing its global market share Cape Town faces stiff competition from other global city destinations. The City adopts a focused competitive strategy, derived from two key elements, namely:

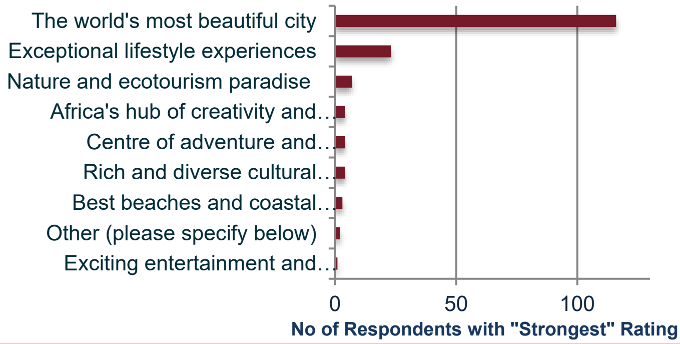
- Competitive positioning: Establishing a clearly competitive market position that differentiates Cape Town from other global tourism destinations and cities.
- Target market strategy: Taking a market-related approach by targeting the most valuable market segments with the highest growth potential and devising marketing and development strategies and programmes that speak to their needs and requirements.

3.5.1. Market positioning

Over the years Cape Town has been rated by traveller polls of leading global travel media services as being among the world's most beautiful, best and greatest travel cities. These include:

- CNN
- Telegraph
- Travel and Leisure
- Lonely Planet
- Conde Naste Traveller
- Various others

Fig. 5: Industry Ratings of Strongest Tourism Selling Proposition for Cape Town (n=166)



Respondents to the online industry survey (Fig. 5) were provided with various tourism selling proposition options for positioning Cape Town. 70% of respondents rated the proposition of Cape Town being "The world's most beautiful city" as the preferred selling proposition.

Given this background the City and its partners will position Cape Town as the most beautiful city in the world, in all its facets of beauty including scenery and climate, the vineyards and wines, exceptional food experiences, art and creativity, the mountain topography, nature and outdoors, variety of conferencing facilities and settings, the coastline, marine life and beaches, the city entertainment vibe and spaces, people and cultural experiences and historical sites and heritage.

The implications of promoting and sustaining the positioning of Cape Town being "the most beautiful city in the world" are substantial and the following guidelines pertain:

- It is of critical importance to defend and expand the "celebrity" image and reputation that Cape Town has attained over the years. This will require substantial marketing resources and, more importantly a collective effort by all stakeholders.
- Environmental and social sustainability and quality are at the core of the positioning and should receive the highest attention.
- Tourism magnets (e.g. the Big 6 attractions, scenic locations, the beaches and others) are highly visible symbols of the positioning and should receive special care and continuous improvement.
- Visitor comfort (safety, health, hygiene, information, mobility) is non-negotiable.
- The industry should continuously strive for excellence in quality, standards and innovation, embracing new trends in information and communication technology, the sharing economy and others.
- The City should encourage and facilitate product development for a wide range of market segments. Opportunities for experiencing Cape Town's natural, social and cultural beauty should be expanded – with a special focus on inclusivity of non-traditional tourism areas such as the Cape Flats and other townships.
- Since Cape Town's many attractions are spread out, the City will make a special effort to provide adequate public transport and facilitate traffic flows to spread visitors as widely as possible.
- Locals need to believe in and advocate the market positioning of "the most beautiful city in the world" and experience it in their daily lives through industry transformation, social inclusivity and ensuring that locals are aware of the importance of tourism, capitalise on tourism entrepreneurial opportunities and share in the city's tourism pride.
- Urban planning, landscaping and architecture should reflect the value placed on beautification and design.
- The combination of Cape Town city and Western Cape regions creates the ultimate travel desination for a large proportion of travellers and the industry will combine attractiveness of the city and surrounding regions in a "Cape Town +" proposition, to reach the maximum number of market segments.

The Cape Town + approach will entail:

- Combining the city experience with complementary experiences offered in the surrounding regions including agritourism, wine tourism, adventure and adrenaline activities, marine tourism, sport (mountain biking, hiking, golf, etc.), cultural experiences, safari and ecotourism, beaches, etc.
- Promoting a minimum 14-day stay, with Cape Town as entry point and base.
- Stretching the season by promoting "winter" products offered in the surrounding regions including whale watching, wildflowers, safari, adventure activities, regional festivals, etc.
- Collaborating closely and conducting joint marketing with neighbouring tourism authorities.
- Ensuring quality of visitor experiences across the board in the City and Western Cape regions.
- Working with regional partners to inculcate a common commitment to sustainability, quality of products and experiences; authenticity, and community engagement.

3.5.2. Target Markets and Products

Given the variety of resources and experiences on offer in Cape Town, the city is able to appeal to wide range of market segments, all with their specific profiles and product preferences. The TDF will focus resources on four core market segments, namely Indulgers, Explorers, Specialists and MICE delegates. The sub-segments under each of these and their characteristics can be summarized as follows:

Segment	Sub Segment	Profile	Product Preferences
Indulgers Want to experience the finer things in life	Luxury	Moneyed, across age groups, skewed to honeymooners and 45+, used to the best quality and unusual travel experiences, tailored package travel, price of lesser concern	Exquisite accommodation, personalised services, privacy and security, high quality facilities and services
	Cruises	Skewed to mid-life and older, time on land limited, packaged sightseers and shoppers	Excellent ground handling, sightseeing highlights, shopping opportunities
	Creative	All age groups. Passion for creativity – cooking, wine making, art, design, photography, wellness and healthy living	Food, wine tasting, coffee culture, art, design and craft browsing, fresh produce markets, organic eating, wellness
	City Break	Young and upcoming couples and friendship groups. Need to escape everyday work life and prepared to spend to make most of their trip	Cultural events, theatre, concerts, shopping and browsing, clubbing, nightlife
Explorers Prefer to go “off-the-beaten tourist track” and experience unusual natural and cultural phenomena	Intrepid	High proportion of Millennials 25-35 years, established income, want extraordinary experiences, travel is a status symbol to be shared with piers. Travel independently. Environmentally aware. Value for money important	Interactive and authentic experiences e.g. backpacking, cultural engagements, outdoor activities, new and off-the-beaten-track locations, opportunities to engage with other travellers, good Wi-Fi a requirement
	Family	Well-off, small and larger family groups, short breaks, increasingly multigenerational, regard travel as an opportunity to bond, price conscious	Family friendly outdoor activities and entertainment, children’s activities, good quality beaches, safety is key, value for money facilities and services
	Mature	45+, well-travelled and well-read, could be in organised groups but most often independent and self-arranged. Wide range of interests and physically active, holiday is about the interactive experience, environmentally and socially aware, authenticity important	“Soft adventure” and outdoor activities such as hiking and cycling, sightseeing, township tours, local music, independent off the beaten track touring, wine tasting and buying, theatre and cultural performances
Specialists	Adventure & Outdoor	Mostly 20-50 years, highly active, focus on	Opportunities for expansion of tourism in

Segment	Sub Segment	Profile	Product Preferences
(Niche) Participants and spectators in		abilities and equipment related to specific activities and hobbies. Risk prone, experience more important than season or time of year	Golf, Cycling, Motorcycling, Diving, Hang- & Paragliding, Kayaking, Mountaineering, River rafting, Trekking, Sky Diving, Shark cage diving, Kite-& Wave Surfing, Dune boarding, Rock climbing
	Culture & Heritage	Across age groups, travel with purpose of having an immersive cultural and heritage experience. Interested in cultural interactions, historical events, etc.	Homestays, volunteer projects, inter-cultural sport exchanges, mission stations, immersion in indigenous cultures e.g. Xhosa, Khoi, Griekwas, Afrikaners, etc.
	Food & Wine	Across age groups, travel with expressed purpose of experiencing and participating in cultivation, production and presentation of superb food and wine products	Food and wine pairing, vineyard and cellar tours, celebrity chef demonstrations, organic produce and markets, cooking classes, personalised wine making
MICE Meetings, Incentives, Conventions Exhibitions	Conference	Members of professional associations, societies and networks, skewed to male, 30-55 years, main purpose to learn and network	Excellent conference venues and logistics, function and networking opportunities, convenient, good quality accommodation, pre- and post-conference experiences

3.6. Strategic goals

Given the challenges and opportunities highlighted in Section 2 and the future vision and ambitions adopted in Section 3, this TDF will pursue five core strategic goals, namely:

1. Ensuring visitor comfort
2. Improving and diversifying products and experiences
3. Stimulating demand
4. Generating community involvement and support
5. Organizing effectively for growth

The key issues to be addressed under each these goals are as follows:

1. Ensuring Visitor Comfort

- Safety and security
- Transport and mobility
- Facility quality and maintenance
- Internet connectivity
- Visitor information

2. Improving and diversifying products and experiences

- Iconic sites
- Spatial development priorities
- New tourism products and destinations
- Regional linkages
- Township tourism
- Sustainable/responsible tourism

5. Organising for growth

- Coordinated strategy
- Maximising/pooling resources
- Inter-departmental synergy
- Sustainable funding
- Public-private collaboration
- Performance Monitoring & Research
- Local level execution

3. Stimulating Demand

- Brand and reputation management
- Air access
- Domestic marketing
- International marketing
- MICE marketing
- Seasonality

4. Generating community involvement and support

- Youth/women's groups
- Employees
- Cultural interaction
- Entrepreneurship

4. Programs and activities

The five strategic goals will be addressed through the following 13 strategies and 32 actions, as outlined below.

4.1. Goal 1: Ensuring visitor comfort

The following strategies will be pursued towards achieving this goal:

1. Tourist Safety Program with 5 program activities
2. Information Mobility Program with 6 program activities
3. Tourist Transport Program with 2 program activities

These strategies and program activities for each are described below.

Strategy 1.1	Tourist Safety Program
Rationale	While various ad-hoc initiatives have been undertaken to address tourism safety incidents and concerns and role players have been brought together in a tourism safety forum from time to time, no comprehensive tourism safety initiative with tangible, measurable outcomes has been undertaken. Industry leaders and operators have rated tourist safety as the most important challenge facing the tourism sector. The City and its partners will undertake a concerted and coordinated initiative to improve tourism safety conditions and to support victims of crime in instance where incidents occur.
Program Activities	**1. Developing secure tourism activity zones in high-risk tourism areas:** Some popular tourism areas of the City are more prone to safety incidents and concerns. These include various hiking trails on Table Mountain, parts of the CBD, some township areas and possibly some popular beach areas. Specific zones in such areas will be identified and earmarked for a special safety focus and these will be recommended to tourist as areas that are safe to visit. Security will be stepped up in these areas, including: • Additional visible policing • CCTV camera networks • Deployment of drones and other technologies to monitor suspicious activities • Having mobile police cubicles at specific points where tourists are able to obtain information on safety conditions and report suspicious activities
	2. Launching City Tourist Police unit: Dedicated Tourist Police units are common features in successful developing tourism countries like Thailand, Malaysia, Korea, Brazil, etc. These units are mainly based in the main cities in key touristic areas and they focus specifically on protecting tourists from crime and being ripped off, as well as providing general support to tourists. The initiative will include: • Agreeing a policy and regulations for a special tourism police unit in the Metropolitan City Police, budgeting for it, etc. • Structuring the unit, selecting and recruiting members form the existing police force to serve in it, designing Tourist Police insignia, etc. • Devising a tourist policing plan to indicate where, when and how the unit will operate • Training members in visitor care, victim support, etc.
	3. Strengthening tourist victim support: Currently there is no special provision for tourist victims of crime, to report such crimes in a swift and well-attended manner and in a calm and dignified environment. The initiative will include: • Working with the SAPS, the Metro Police, Cape Town Partnership and private sector to identify and develop a tourist reporting and support space at the police

Strategy 1.1	Tourist Safety Program
	station or another suitable location where tourists can be assisted to report crimes. This space should be separate from the local charge office and should be manned by members of the proposed tourist police unit • Soliciting volunteers with foreign language skills to assist when victims of crime are unable to converse in languages that are not practiced by police • Appointing a specific tourism officer(s) to assist victims of serious safety incidents (accidents, crime, etc.) with moral support, contacting embassies and families, etc.
	4. Strengthening a coordinated Tourist Safety Forum and communication: Stakeholders responsible for and involved in tourist safety are brought together from time-to-time in response to safety incidents. This initiative will be strengthened to have a permanent Tourist Safety Forum, chaired on a rotational basis by the various tourism authorities and organisations operating in Cape Town. This will include: • Liaising with SAPS and the Metro Police to appoint dedicated representatives to serve on such a forum • Liaising with the various public sector authorities, private sector associations, representatives, community tourism associations, major attractions and other relevant bodies to appoint dedicated representatives to serve on such a forum • Arranging monthly meetings with a running agenda on which members can report progress and address tourist safety issues • Devising and agreeing a tourism crisis communication protocol and action plan to ensure coordinated and responsible communication and reporting on instances and issues that affect tourist security • Setting up suitable communication mechanisms for communicating tourist safety conditions, actions and opportunities for collaboration to the tourism industry at large • Working with SAPS to record and establish a database of tourist safety incidents • Initiating actions and mechanisms for communicating to tourists to Cape Town guidelines for a safe and secure visit
	5. Establishing community tourism safety forums in local tourism areas: Perceptions of tourism safety risks are more prone in some community tourism areas, mainly due to past crime incidents in such as areas. Tourism areas such as Mitchells Plain, Langa, Gugulethu and Khayelitsha and others (e.g. Hout Bay, Lwandle, Sir Lowrys Pass Village, Mamre, Atlantis etc.) require special attention and the tourism industry and SAPS operating in these areas will establish local tourism safety forums. These forums will: • Serve as monitoring bodies for tourist safety conditions in their areas • Liaise with local community organisations, NGOs and others in their areas to identify safety risks and solutions and to assist in addressing such • Serve on the city Tourist Safety Forum to communicate conditions, concerns and actions to the broader tourism industry

Strategy 1.2	Information Mobility Program
Rationale	The assessment of global travel trends has identified the increasing influence and power of travellers using their mobile devices to plan, execute, communicate and evaluate their journeys. Facilitating mobility of tourist information and communication will place Cape Town at the forefront of tourist enjoyment and will allow the city to capitalise on the power of global communication technology.
Projects Activities	**1. Providing free Wi-Fi access at key tourist sites and congregation points:** There are specific areas in the city where tourists congregate and spend idle

<table>
<tr><th>Strategy 1.2</th><th colspan="2">Information Mobility Program</th></tr>
<tr><td></td><td></td><td>time, e.g. when queuing at TMAC, in the V&A waterfront, in Long Street, at the top of Table Mountain, etc. Providing free high speed Wi-Fi access in such ring-fenced tourism areas will allow visitors to communicate their experiences to their friends and social media connections in the rest of the world. At such points, messages can be pushed to visitor when connecting to Wi-Fi, encouraging them to share their Cape Town experiences with the world.
This initiative will be pursued in association with and through sponsorship of fibre optic infrastructure and internet service providers and their contributions should be duly acknowledged.</td></tr>
<tr><td></td><td>2.</td><td>Sending visitor mobile welcoming and other messages to visitors upon arrival: When visitors to Cape Town switch on their mobile phones and connect to mobile providers, tourist welcoming messages will be communicated to them, e.g. “Welcome to Cape Town, the World’s Most Beautiful City! We support sustainable tourism development, help us conserve our water resources and environment. Adhere to basic safety guidelines while enjoying our beautiful city.”
This initiative will be pursued in association with and through sponsorship of mobile phone companies and their contribution should be duly acknowledged.</td></tr>
<tr><td></td><td>3.</td><td>Expanding special photographic points: The “photo frames” erected at key tourist spots such as Big Bay beach and elsewhere are very popular and provide an excellent incentive for visitors to take a happy picture of a beautiful location and distribute this via social media and other platforms. This initiative will be expanded to include as many points of photographic interest as possible. Factors to consider in expanding the initiative are:</td></tr>
<tr><td></td><td>•</td><td>Various concepts for providing photographic opportunities will be investigated and employed. These could include large photographic frames, decks and platforms, natural vantage points and other points</td></tr>
<tr><td></td><td>•</td><td>In selecting such sites, the emphasis and focus will be on unique and impressive photographic scenes and backgrounds; areas with safe parking and easy pedestrian movement; elimination of visitor injury risks, etc.</td></tr>
<tr><td></td><td>•</td><td>Environmental and scenic integrity will be respected in erecting such structures and environmentally compatible materials will be investigated for manufacturing these</td></tr>
<tr><td></td><td>4.</td><td>Expanding mobile Visitor Information Centre (VIC) and ambassador initiative: The mobile VIC implemented by Cape Town Tourism has proven a success and the City will expand a mobile visitor information drive. In this respect:</td></tr>
<tr><td></td><td>•</td><td>This initiative will be expanded to include both mobile kiosks on trailers that can be moved depending on visitor’s movements and events, as well as motorized VICs</td></tr>
<tr><td></td><td>•</td><td>These VICs will be supported by Cape Town Visitor Ambassadors, who could be volunteers or interns that move around in suitably branded attire</td></tr>
<tr><td></td><td>5.</td><td>Expanding road signage and interpretative signage: Both tourism road signage and pedestrian directional and interpretive signage, i.e. brown roads signs and “You are Here” maps and storyboard signs erected by the City in key tourism areas have yielded excellent results. This initiative will be re-assessed and managed accordingly.</td></tr>
<tr><td></td><td>•</td><td>A medium term spatial rollout plan will be drafted in this regard, indicating where signage and what type of signage will be erected</td></tr>
<tr><td></td><td>•</td><td>The Legible City Programme will be further expanded for identified precincts, including provision for interpretation signage, pedestrian signage, provision of information, seating and other visitor amenities</td></tr>
<tr><td></td><td>•</td><td>A maintenance plan will be drafted for repair and upkeep of existing signage</td></tr>
</table>

Strategy 1.2	Information Mobility Program
	• The Regional Tourism Liaison Committee (RTLC) will be responsible to assist with these applications, whilst the current operations will be re-assessed to improve service delivery.
	6. Continuously improving functionality and content of the www.capetown.travel website: The website is the most important baseline marketing and information tool for the destination and serves as a basis for capturing and communicating Cape Town's positioning of being the most beautiful city in the world. Currently the website is highly rated and used and it will be further improved, among others by: • Enhancing content with experiential stories and storylines for the various tourism destinations and routes in the city, building on natural and cultural heritage, lifestyle, etc. • Continuously improving the mobility/mobile friendliness of the website to ensure that users on mobile devices are exposed to the most appropriate messages at various times and occasions during the year and that information can be found swiftly and easily • Continuously improving information interpretation through incorporation of the latest mapping applications, virtual reality (VR) and augmented reality (AR) functionality, geo-tagging on social media, multi-purposing of content captured on the website, etc.

Strategy 1.3	Tourist Transport Program
Rationale	A key objective of the TDF is to increase visitors' length of stay. Facilitating easy movement to allow visitors to explore as widely and freely as possible is an important prerequisite for retaining visitors longer and spreading their expenditure throughout the city. In addition, visitors have limited time in the destination and would like to spend as little time as possible sitting idly in traffic'. This program will focus on optimally leveraging the available infrastructure in the city for tourism purposes.
Program Activities	**1. Launching a tourist traffic improvement initiative:** This initiative will entail assessment of Cape Town's traffic situation from a tourism perspective and addressing traffic obstacles and shortcomings on key tourism routes and points. This will include: • Conduct an audit of peak season traffic flows, bottlenecks and parking constraints on key tourism routes and at major tourist convergence points and pinpoint where interventions are required, in accordance with the iconic sites improvement program (Goal 2) • Identify and engage all parties that could play a role in addressing assessed challenges • Work with public and private partners to address traffic flow and parking challenges; and adopt a staged implementation approach
	2. Implementing a tourist transport improvement initiative: This initiative will entail assessment of Cape Town's tourist transport situation and addressing obstacles and shortcomings for allowing ease of tourist movement and allowing tourists to spread throughout the city. This will include: • An assessment of tourism transportation facilities and amenities from a multi-modal perspective, including public and private transport opportunities and determining if and where there are gaps in tourist transportation • Work with public and private partners to address tourists transport

Strategy 1.3	Tourist Transport Program
	• Provide tourist-friendly ticket options on the MyCiti bus network, e.g. multi-day tourist passes on key tourist routes and allow for tourists to purchase tickets online when planning their holidays • Produce visitor transport maps containing bus and train routes and schedules for online and on-site distribution

4.2. Goal 2: Improving and diversifying attractions and experiences

These strategies and program activities for each are described below.

The following strategies will be pursued towards achieving this goal:

1. Iconic Sites Improvement Program with 3 program activities
2. Sustainable Cape Town Program with 3 program activities
3. Spatial Planning Program with 1 program activity

Strategy 2.1	Iconic Sites Improvement program
Rationale	Cape Town's positioning as the most beautiful city in the world is grounded in its array of spectacular attractions, many of which rate among the most visited tourist sites in the country. According to research conducted by SA Tourism, nine of the ten most visited locations by foreign tourists to South Africa are in the Western Cape, seven of which are in the City, i.e. (in order of visitation) the V&A Waterfront, Cape Town CBD, Cape Point, Table Mountain Aerial Cableway, Table Mountain (general), Camps Bay and Kirstenbosch, Botanical Garden. Other sites in the City that rate among the 20 most visited sites in South Africa are Robben Island, Clifton Beach and the Cape Point Ostrich farm. Importantly, Cape Town is also the gateway to various areas in the Western Cape that rank among the top 20 attractions i.e. the Cape Winelands, the Garden Route, Tsitsikama National Park and the Karoo national Park. While some of these leading sites like V&A Waterfront and Kirstenbosch are in their entirety managed by singular authorities and visitor infrastructures are provided by such authorities, the majority e.g. Table Mountain National Park and surrounds, the beaches, the CBD, etc. are dependent upon services and infrastructures delivered and maintained by the City. Robben Island, although managed under separate domain, is in urgent need of improvement. The sustainability of the tourism industry in Cape Town and the health of "Brand Cape Town" depend heavily on the quality of the visitor experience at these sites. In addition, tourism gateways (road, air and sea entrances to key towns and nodes in the Cape Town Metropole) will receive special attention, since these areas affect first impressions that visitors will form of the city.
Program Activities	1. **Assessing tourism conditions at and around iconic sites and sites with iconic development potential:** This initiative entails identifying sites where the City has a key role in product improvement and working with partners to continuously assess tourism conditions and improvement needs. This will include: • Identify and agree on tourist sites that need the City's support, engaging partners in the City, province, Sanparks and other organisations and working with them to identify iconic visitor areas that may be in need of improvement and upgrading as well as other sites that could improve in tourism value with minimal intervention, and prioritise them in respect of importance and need for improvement • Conduct an audit of such sites and surrounds and identify improvements required, including traffic and transport entrances, parking, ticketing, toilets,

Strategy 2.1	Iconic Sites Improvement program
	seating, visitor safety (in all respects), visitor information, pedestrian flows, pedestrian signage, environmental impacts and sustainability, etc.
	2. Devising improvement plans for each site: The City and its partners will engage in a joint planning to develop concept improvement plans for aspects that are identified as requiring attention and improvement. It is essential that tourism interventions be linked to the City IDP and business plans of departments that are responsible for their implementation. The city and partners will agree on roles and responsibilities for managing and funding such improvements in a phased manner.
	3. Continuous monitoring of conditions at iconic sites: The City will work in close collaboration with partner agencies and organisations to monitor visitor conditions around key sites, sites that become less visited due to neglect and undeveloped sites with tourism potential, especially where the City plays a role in providing infrastructure and services.
Strategy 2.2	Sustainable Cape Town program
Rationale	Over the past decade Cape Town has played a leadership role in advancing and implementing Responsible Tourism principles and practices. Since environmental and social sustainability and equity is at the core of Cape Town's tourism brand, this philosophy and supportive practices will be strengthened and expanded to include the broader tourism industry and become a cornerstone of the city's marketing message.
Program Activities	**1. Adopting a sustainable tourism assurance scheme, for endorsement, promotion and application by the City and its partners:** There are various sustainability assurance schemes and labels available internationally. The City will adopt a suitable scheme and advocate the usage and support of the scheme and its criteria among major attraction and tourism operators, to support the brand and image of a sustainable tourism city. This will include: • Establish a tourism sustainability workgroup, consisting of relevant public and private sector partners, which will meet on a regular basis to pursue the establishment of a sustainability assurance scheme and other initiatives regarding sustainability • The workgroup to study various systems, engage with relevant label providers and recommend a preferred scheme • The City and it's various departments and agencies to lead the application of the adopted sustainability scheme at the various tourism sites and facilities managed by the City • Implement a sustainability program at key sites, by working with partners to ensure that key sites and visitor areas fulfil sustainability conditions required by the scheme and adapt where necessary • Engage major tourism partners in the City and province (e.g. V&A, TMAC, Sanparks, Fedhasa, SATSA, ASATA, key hotel groups, etc.) to adopt the recommended scheme at business and destination level • Implement the scheme as a voluntary component of CTT membership scheme
	2. Spearheading a sustainable city publicity initiative: The City and Cape Town Tourism will launch a planned, consistent communications campaign to promote and celebrate Cape Town's innovation towards sustainability. This will entail: • An online and traditional media hosting program, to identify and host travel and consumer media journalists to publish sustainability success stories, awards, etc. • Distributing information and guidelines to the travel trade and visitors to the City to publicise the sustainability approach, successes in this regard and guidelines

Strategy 2.1	Iconic Sites Improvement program
	regarding the sustainable use of resources, the environment, social and cultural sensitivity, etc.
	3. Continuing and strengthening the Universal Access in tourism initiative: The guidelines, information materials and website that have been developed to promote Universal Access in the city will be further strengthened and expanded. Industry workshops and information campaigns will be launched to raise awareness among tourism product owners and visitors to the City.

Strategy 2.3	Tourism spatial planning program
Rationale	Tourism currently receives limited attention in the Municipal Spatial Development Framework 2017 – 2022 and in the various district spatial plans. While these plans mention “destination places”, they do not take a broader, proactive tourism view and these largely refer to nature reserves and areas demarcated for recreation use.
Program Activities	**1. Integrating local area spatial tourism concepts for high-potential developing tourism areas in the City’s spatial planning frameworks:** Developing tourism areas like Table Bay, Strand/Gordon’s Bay, the False Bay coastline, Khayelitsha, Durbanville and secondary scenic routes are in need of concerted tourism interventions and tourism concept planning proposals will be developed for such areas and integrated into the MSDF, District Spatial Plans, Local Area Plans and Precinct Plans. In devising such plans issues of land use zoning, bylaws or policies that hinder tourism development should be addressed

4.3. Goal 3: Stimulating demand

The following strategies will be pursued towards achieving this goal:

1. Joint Leisure Marketing Expansion program with 2 program activities
2. Continued Air Access Program with 1 program activity
3. Expanded MICE and Events Marketing Program with 2 program activities

The strategies and program activities for each are described below.

Strategy 3.1	Joint Leisure Marketing Expansion Program
Rationale	The tourism authorities in Cape Town and the Western Cape, i.e. Cape Town Tourism and Wesgro) have done a sterling job over the years in promoting the city and province, given the very limited resources at their disposal. However, destination marketing remains restricted and is not optimally effective due to a) the lack of a clearly defined marketing strategy that guides the marketing of the province and city; b) fragmentation of marketing efforts, activities, human and financial resources and c) the limited marketing funding available for promoting the destination. The following initiatives are imperative for reaching the growth objectives set in this TDF.
Program Activities	**1. Formulating a collective 3-year marketing strategy:** The City and Cape Town Tourism will engage partners such as SAT, Wesgro, tourism bodies in neighbouring regions, local area tourism forums and private sector bodies in devising a marketing growth strategy for promoting the city as a leading global leisure destination. The strategy should be based on research available at national, provincial and city level and will define: • Brand application of the “Love Cape Town” brand, including:

<table>
<tr><th>Strategy 3.1</th><th>Joint Leisure Marketing Expansion Program</th></tr>
<tr><td></td><td>

<li style="list-style-type:none">
<ul style="list-style-type:circle">
Redefining the key brand messages and values underpinning the brand and how these can be effectively communicated, based on the positioning of Cape Town as the most beautiful city in the world
Defining brand architecture, i.e. how the brand will be cascaded and applied at local area levels in the City, to product and experience themes, to scenic routes, etc. and how this will be reflected visually and verbally in electronic and printed marketing materials
Co-branding policy and practices, i.e. what are the guidelines, rules and approval processes for applying the brand in partnership with the provincial branding, individual brands of member businesses, brands of sponsors, etc.

Performance targets/objectives, based on the targets set in this TDF and broken down in more detail per annum and performance indicator
A clearly defined target market approach, indicating the source markets and segments that will be targeted and a proportional breakdown of marketing expenditure on each of these
Product packaging and presentation guidelines to match market segments, indicating
<ul style="list-style-type:circle">
The destinations, experiences and themes that will be promoted to the various market segments and
Linking these to surrounding complementary tourism regions in the province to achieve a “Cape Town +” proposition

Outlining broadly domestic and international marketing mixes for the key target markets, i.e. online marketing methods, tactics and channels, PR and media, travel trade engagement, advertising, etc.
A breakdown of resources that are available and the gap in resources required to fulfil the strategy, including opportunities for in-market presence
Clarifying roles and responsibilities for executing the strategy
Based in the resource assessment, outlining approaches for:
<ul style="list-style-type:circle">
Generating adequate resources for delivering the strategy
Leveraging funding through joint marketing approach and opportunities among the various interested and affected parties

</td></tr>
<tr><td></td><td>
2. Executing a “14 Days of Splendour[3]” all-year-round promotion campaign: As has been shown in the situation analysis section the average length of stay has been declining during the past few years and seasonality remains a challenge. The recently launched “Nowhere Does It Better” online media campaign, a collaborative campaign in response to the tourism impacts of the water crisis and coordinated by Wesgro lends a positive impetus to promoting Cape Town and the Western Cape. However, this is a limited and ad-hoc initiative. A consistent, all-year round domestic and international marketing campaign will be launched with the objective or retaining visitors in Cape Town for as long as possible and increasing visitor share during the traditional slower season periods. This will include:

Devising a suitable campaign theme and identity, which will reinforce Cape Town’s positioning as the Most Beautiful City in the World. The campaign identity should link to an build on the “Nowhere does it better” campaign
The campaign subluminal messaging should focus on Cape Town as a sustainable tourism city to offset concerns about water shortages

</td></tr>
</table>

[3] “14 Days of Splendour” is an indicative campaign name to indicate that the objective should be to retain visitor in Cape Town for a longer period; a suitable campaign name and identity should be developed as part of the initiative

Strategy 3.1	Joint Leisure Marketing Expansion Program
	• The campaign will seek to package and promote on segmented basis experiences, routes, activities, itineraries with various options for spending up to 14 days in Cape Town • The campaign will adopt a multi-faceted promotional mix, with highly creative visual images and sound bites to communicate the key messages underpinning the campaign through a major online advertising and social media focus, traditional media channels, word-of mouth, the travel trade and selective advertising. • It will link strongly to the Air Access expansion program, working with the various airlines with the objectives of promoting the variety of activities on offer towards and increased length of stay • The campaign will be rolled out both domestically and internationally, with suitable promotional mixes devised for the various source markets • It will take a “Cape Town +” approach, focusing on Cape Town as a base for exploring the city and surrounding areas, travel themes and routes • In addition to promoting the natural beauty of the area, a special effort will be made to expose the cultural diversity and rich cultural experiences on offer • Partnerships will be at the core of the campaign and Cape Town Tourism will strike up marketing partnerships with SAT, Wesgro, other regional partners, the travel trade, airlines, Online Travel channels, etc. • The campaign will run throughout year with winter and summer promotional drives, over a period of three years, with varying seasonal tactics and market focus • It will include a concerted effort to increase domestic and foreign brand value through coverage major events being held in the city
	3. **Launching a niche market promotion drive:** The City has researched various special interest market segments such as adventure tourism, Halal tourism, cultural tourism and others. A focused effort will be made to attract visitors with these specific interests, among others by: • Researching and establishing the most appropriate associations and distribution channels for reaching the various niches within each of the special interest segments. • Setting up attractive content that will appeal to the various niches on the Cape Town Tourism website and social media pages • Engaging in an online push-marketing campaign to reach out to participants and fans of the various niche activities and to entice them to visit Cape Town • Hosting specialized journalists and bloggers with a following in the various niche markets in Cape Town and tracking the impact of their publications

Strategy 3.2	Air, Rail and Cruise Access Program
Rationale	The Western Cape Air Access initiative, coordinated by Wesgro, has resulted in major increases in the number or international airlines landing at Cape Town International Airport, in Air Traffic Movement (ATMs) and flight frequencies as reported in Section 2.3 and Appendix B. The growth in air access opens up major opportunities for raising tourism demand, however past experience has shown that airlines will quickly and easily change tack when demand does not warrant the additional capacity. The City will work with its partners to ensure continued viability and expansion of the airline capacity, not only during peak season periods but throughout the year.
Program Activities	1. **Continuing to work with and support the Cape Town Air Access Initiative and other similar initiatives** to expand access to the city. The City and Cape Town Tourism will:

<table>
<tr><th>Strategy 3.2</th><th>Air, Rail and Cruise Access Program</th></tr>
<tr><td></td><td>Advocate support for the Air Access initiative to business and public (government) networks in Cape Town, create support in the business community for the various international air routes and assist in launch events for new routes or route expansions
Work with partners (PRASA (rail), Harbours (Cruising) etc. on similar initiatives
Provide marketing support to airlines and other transport modes operating routes to Cape Town through Cape Town Tourism, including:
Incorporating the various access routes and flight opportunities in the above mentioned “14 days of Splendour” marketing campaign
Assisting in media attention and awareness
Promoting with the airlines relevant events and conferences in the city and region
Assisting with hosting travel trade familiarisation and educational trips</td></tr>
</table>

<table>
<tr><th>Strategy 3.3</th><th>Expanded MICE and Events marketing program</th></tr>
<tr><td>Rationale</td><td>Cape Town has over the past 15 years been established as a popular and famous destination for hosting large conventions and major events. The role of conventions and events in addressing seasonality and generating tourism business during fluctuating leisure tourism demand should not be underestimated.

While the mandate for MICE marketing does not rest directly with the City and Cape Town Tourism, the City contributes to the MICE marketing budget of Wesgro and should evaluate and contribute to the MICE marketing strategy.

The City Events department plays an important tourism role in bidding for and supporting major events held in the city. This department will engage closely with Cape Town Tourism and Wesgro, to gain maximum brand exposure, attract additional visitors to the city, spread tourism widely through the city, offset tourism seasonality, etc.</td></tr>
<tr><td>Program Activities</td><td>1. Expanding MICE (Meetings, Incentives, Conventions and Exhibitions) marketing focus and resources: The City will engage Wesgro’s Convention Bureau, the CTICC and other role-players in canvassing for and advising on an expanded MICE marketing strategy. This will include:
Evaluating and strengthening, where required, aspects such as new markets to tap into, strengthened relationships with and insights into global and regional conferencing clients (professional associations, societies, corporates, etc.) institutions in the city involves in such (universities, research institutions, NGOs etc.) new and emerging marketing channels and platforms and improved coordination among stakeholders
Considering avenues for improving and strengthening financial and human resources for MICE marketing</td></tr>
<tr><td></td><td>2. Leveraging maximum tourism value from sport and cultural events: The City will engage Cape Town Tourism and Wesgro to leverage maximum tourism value from events. Aspects to consider will include:
Implementing focused marketing and branding programs to maximise the potential tourism value of the events portfolio
Adjusting support where necessary to support the geographic and seasonal spread of tourism in the city</td></tr>
</table>

4.4. Goal 4: Generating Community Involvement, Benefits and Support

The following strategies will be pursued towards achieving this goal:

1. Cultures of Cape Town Development Program with 4 Program Activities
2. Community Tourism Engagement Program with 2 Program Activities

The strategies and program activities for each are described below.

Strategy 4.1	Cultures of Cape Town Development Program
Rationale	Cape Town's cultural and heritage diversity is a major asset that should complement the positioning as the most beautiful city in the world. There is a dearth of authentic cultural experiences in the city. The City's area development officers will play a central role in facilitating and supporting the execution and implementing of the program.
Program Activities	**1. Launching local areas cultural tourism initiative:** This will entail focusing tourism development in disadvantaged areas with rich and unique cultural lifestyle i.e. Xhosa, Coloured and Cape Malay. The program will entail the following elements: • Identify 4-6 routes and destination areas as focal areas for tourism development over 5 years, with the objective of launching two of these per year • Identify relevant community structures, NGOs, private companies and other relevant support organisations and garner support and commitment for development of tourism along the routes and in the destination areas • Conduct product development workshops with interested and affected parties to come up with feasible product development concepts for the areas • Devise a basic but clear are development plan for each of the areas • Obtain commitment of other Departments in the City and various interested and affected parties to support and implement the development plans and commence implementation
	2. Setting up local Tourism Forums. Local tourism forums will be established for each of the destination development areas. The forums will be comprised of the various stakeholders who commit to the development of the areas. The composition of the forums will be tailored to local conditions and interests. The City's area tourism officers will provide secretarial services. The roles of the forums will be: • To adopt and commit to the execution of the area development plans • To facilitate opportunities for networking and information sharing of statistics and various issues of tourism importance • To play an active role in partnership with the City in implementing the plans • To act as a liaison mechanism between the local community and the authorities involved in executing the plans • To monitor the implementation of the plans, raise issues of concern and provide advice and guidance in executing the programs
	3. Implementing various capacity development programs in selected local areas: The local tourism forums in the areas selected for developing the Cultures of Cape Town program will require support of the city in developing commercial tourism services and facilities and ensuring that the areas are safe, clean of litter. The initiative will include the following actions, among others: • Conduct entrepreneurship and service training and mentorship: Existing and prospective tourism entrepreneurs in the selected areas will be provided with entrepreneurship support, training and mentoring. Mentoring of entrepreneurs will be conducted in partnership with the mainstream tourism industry in the city,

Strategy 4.1	Cultures of Cape Town Development Program
	ideally through local branches of partnership organisations like Fedhasa, SATSA, etc. • Launch a community safety initiative in the areas: See Strategy 1.1, Activity 5 • Launch an anti-litter and cleaning campaign in selected areas: The City (tourism function in partnership with the City Waste Department) and local tourism forums will engage local community organisations and schools in an anti-litter campaign, with a annual prizes awarded to area forums that perform particularly well in this regard (See Strategy 4.1)
	4. Packaging and marketing cultural experiences: A special effort will be made to promote market-ready cultural experiences and Cape Town Tourism will engage in a dedicated marketing initiative to facilitate travel trade and consumer exposure to community-based cultural experiences.

Strategy 4.2	Community Tourism Engagement Program
Rationale	While tourism has flourished over the years in the City Bowl and peninsula, many people living in the Cape Flats and township areas have not been privy to experiencing tourism first-hand and, as a result, do not value the potential benefits and importance of tourism economic growth (taxes for social services, business opportunities, etc.) and job creation. A successful and sustainable tourism industry relies heavily on the support of citizens for sharing local infrastructure and resources with visitors, ensuring visitors' safety and general hospitality shown towards tourists. Tourism stakeholders rated lack of such support as an aspect of concern that needs to be addressed by the City.

Program Activities	**1. Launching the Cape Town Tourism Schools initiative:** The initiative will be launched in selected schools in Cape Town, with the objective of fostering awareness of tourism opportunities and pride in Cape Town's tourism identity among learners between the ages of 11 and 14 years, prior to learners making more focused subject choices towards a future career. The initiative will be a voluntary activity in schools that engage in the program and will complement and supplement the current curriculum and school program. The tourism authorities in the Western Cape, with very positive results, implemented a similar program some years ago. The City will:
	• Engage the Western Cape Education Department (WCED) to agree on a feasible approach and logistics for the program
	• Engage Cape Town Tourism and private sponsors (e.g. key attractions, hospitality groups, Airports Company of South Africa (ACSA), Sanparks, Cape Nature, mobile phone providers, etc.) for supporting the program in cash and in kind
	• Establish a Cape Town Schools Tourism Club, to which teachers and learners will subscribe free of charge and in return will receive benefits such as:
	    o Teacher and learner "Tourism Passport" with discounted entrances fees and rates at specific times of the day and year
	    o An electronic/mobile newsletter to keep club members informed of tourism developments and events, communicate special promotions, etc.
	• Run annual tourism awareness and pride competitions in the schools, e.g. drama, essays, art, video productions, etc. with prizes for winning schools and publicise these widely
	• Engage tourism colleges and other tertiary institutions in establishing a bursary scheme for learners that make exceptional contributions to the schools programme and show a special affinity and passion for a tourism-related career

	2. Launching a Tourism Employee Ambassador initiative: Each of the 45,000 employees that are directly employed in the tourism industry live in a city neighbourhood. The majority live in areas where local communities are

Strategy 4.2	Community Tourism Engagement Program
	generally not fully cognisant of the importance of and responsibilities associated with tourism growth and that their earnings from tourism support family members, who in turn spend a substantial proportion of their income in local areas. The objective of this initiative is to solicit the support of tourism employees to become tourism ambassadors who demonstrate the importance of tourism to their fellow residents. This will be achieved by: • Engaging major tourism employers in tourism to devise an attractive, well-incentivised ambassador scheme and to encourage employees to support and participate in it • Similar to the tourism schools program, providing employees that subscribe to the program with a "Tourism Passport" with benefits • Linking employees to schools in their areas that belong to the Schools Tourism initiative, to interact with such schools and engage with learners on tourism awareness • Staging a "Tourism Ambassador of the Year" award to reward employees who have gone the extra mile in influencing their local communities to support tourism growth

4.5. Goal 5: Organising for Growth

The following strategies will be pursued towards achieving this goal:

1. Tourism Partnerships Program, with 4 Program activities
2. City Tourism Capacity Enhancement Program, with 2 Program activities

The strategies and program activities for each are described below.

Strategy 5.1	Tourism Partnerships Program
Rationale	As stated in Section 3.4 this TDF strives to maximise public, private and community partnerships and recognises that the success of this TDF is wholly reliant upon partners working in synergy, under the principles of tourism being government led, private sector driven and community based.
Program Activities	1. **Engaging partners in a collective tourism marketing initiative:** As indicated in Strategy 3.1 above, the historical fragmentation of marketing strategies and resources limits the impact of marketing efforts. Fragmentation of efforts will be reduced and impact enhanced by stakeholders agreeing to and participating in the formulation of a collective marketing strategy for the City and province (Strategy 31.). This will be achieved by: • Establishing a collective industry marketing forum (similar to Joint Association Members Meeting Sessions (JAMMS)) as mechanism for devising a singular marketing strategy and execution plan for the City (see Strategy 3.1) • Clarifying of roles of the various government entities and agencies (CTT, Wesgro and others) and the private sector • Agreeing and coordinating financial resources and application of capacity • Pooling of resources through a menu of opportunities for partners to buy into and participate in
	2. **Forming a City Tourism coordinating cluster:** Active participation in executing this TDF, by the various relevant departments in the City is crucial to its success. In this respect: • The Mayoral Committee Member responsible for tourism will bring together on a regular basis all tourism-related departments of CoCT as a coordinating committee for tracking and executing the TDF

Strategy 5.1	Tourism Partnerships Program
	• The purpose of the committee will be to track progress with the TDF and to ensure the participation of all relevant departments • The TDF will serve as an agenda framework and the committee will be chaired by Mayoral Committee Member responsible for tourism • The tourism unit in Department Enterprise and Investment will serve as secretariat
	3. Engaging in bilateral tourism development partnerships: Various authorities, companies and agencies such as Sanparks, Iziko Museums, Robben Island Museum, Metrorail, Artscape and other are important partners in executing the TDF. The City will establish formal and informal bilateral agreements with relevant bodies as and when the need arises.
	4. Coordinating Local Area Tourism initiatives: Various TDF strategies are heavily dependent upon the participation of local communities and require active participation by the City's local area officers responsible for tourism. These include the tourism spatial planning program (Strategy 1.3), cultures of Cape Town development program (Strategy 4.1), Community Tourism Engagement Program, etc. • The Department of Enterprise and Investment will establish a Local area tourism officers coordinating workgroup, to ensure coordinated implementation of the programs and projects included in the TDF

Strategy 5.2	City Tourism Capacity Enhancement Program
Rationale	Effective implementation of the TDF will require substantial human and financial resources. The current tourism organisational and financial capacity in the City is inadequate for ensuring proper attention is given to the programs , strategies and projects contained here.
Program Activities	**1. Strengthening the tourism function in the City:** Currently the tourism unit in the Department of Enterprise and Investment is inadequately staffed to do justice to the TDF. The unsatisfactory progress with implementing the previous TDF is proof of this and the situation should be addressed as a matter of urgency. This will entail: • Conducting an organisational work study of the roles, activities and structure of the unit and strengthening capacity accordingly • Based on the findings and where requited, launching a destination management training programme for tourism officials
	2. Collecting and analysing tourism performance statistics and research: As the saying goes "you cannot manage what you don't measure". Collecting and analysing tourism data at city level requires a collective effort among stakeholders. The City tourism unit has identified a range of research opportunities that they will pursue over the period of the TDF. These include: • Devising a quarterly barometer of tourism performance based on indicators like airport passenger arrivals, visitor figures at key attractions, hotel occupancy and revenue figures • Conducting regular visitor profiling and satisfaction surveys • Monitoring the spatial dispersion of visitors • Conduction event impact studies, feasibility studies and other research studies to inform the development of tourism
	3. Increasing available funding for tourism development and marketing: As indicated in *Appendix E*, the current funding available for promoting and developing tourism in Cape Town and the Western Cape is wholly insufficient for seriously progressing the issues and programs outlined in this TDF. Options will be investigated for increasing tourism funding, including:

Strategy 5.2	City Tourism Capacity Enhancement Program
	• Substantially increasing the tourism budget allocation in accordance with the economic development role and impact of tourism • Investigating, with industry partners, the option of a tourist service levy (either voluntary or compulsory) to be paid by visitors and collected by the industry. Such tourist levies are common practice across the world and many destinations fund their tourism programmes partly or fully through tourist levies
	4. Continuously monitoring progress with implementing the TDF: The Implementation Plan that follows here contains specific Success Indicators. The TDF will be subject to a formal quarterly review to identify and rectify areas of unsatisfactory progress.

Implementation Plan

The goals, strategies and projects contained in the TDF will require continuous review and implementation progress will be monitored continuously. The following table summarises the required implementation priorities and processes.

Strategy	Activities	Lead	Support	Year			Success indicators
				1	**2**	**3**	
Goal 1: Ensuring Visitor Comfort							
Strategy 1.1: Tourist Safety Program	1. Developing secure tourism activity zones in high-risk tourism areas	CCID/ attractions	CTT/Province/City	X	X	X	% Decline in tourism related crime incidents
	2. Launching City Tourist Police unit	City Law Enforcement	SAPS/Province		X	X	No. of Tourist Police Officers deployed
	3. Strengthening tourist victim support	Province/SAPS	CTT/Wesgro	X	X	X	Turnaround time of initiatives/Victim satisfaction
	4. Strengthening a coordinated Tourist Safety Forum and communication	City Tourism	CTT/SAPS/Province	X	X	X	% Decline in tourism related incidents/Increased industry satisfaction
	5. Establishing community tourism safety forums in local tourism areas	City Law Enforcement	City Tourism/ Area Based Tourism (ABT) / Communities		X	X	No. of active community tourism forums
Strategy 1.2: Tourist Information Mobility Program	1. Providing free Wi-Fi access at key tourist sites and congregation points	City Tourism/ Private Sector	Attractions	X	X	X	No. of free WiFi tourist spots
	2. Sending visitor mobile welcoming and other messages to visitors upon arrival	CTT	Mobile Phone Providers		X	X	No. of messages sent out to tourist rented phones
	3. Expanding special photographic points	City Tourism	Province/Sanparks/relevant land owners	X	X	X	No. of new developments

Strategy	Activities	Lead	Support	Year			Success indicators
				1	2	3	
	4. Expanding mobile Visitor Information Centre (VIC) and ambassador initiative	CTT	City Tourism/Province/Sponsors		X	X	No. of mobile VIC deployments/No of mobile visitor interactions
	5. Expanding interpretative signage	City Tourism	Province/TDA		X	X	No. of new signs erected and maintained
	6. Continuously improving functionality and content of the www.capetown.travel website	CTT	City Tourism/sponsors	X	X	X	Growth in website usage and effectiveness– user sessions, page impressions, bounce rate
Strategy 1.3: Tourist Transport Program	1. Launching a tourist traffic improvement initiative	TDA	City Tourism	X	X	X	Improved tourist and industry satisfaction/reduction in traffic congestion at key tourist spots
	2. Implementing a tourist transport improvement initiative	TDA	City Tourism/MyCiti/private transport providers	X	X	X	No. of tourist tickets sold No. of maps distributed
Goal 2: Improving and diversifying attractions and experiences							
Strategy 2.1: Iconic Sites Improvement Program	1. Assessing tourism conditions at and around iconic sites and sites with iconic development potential	City Tourism/ Area Based Tourism (ABT) /Site owners	CTT/Agencies/ Sponsors	X			Improved tourist and industry satisfaction Reduction in crime incidents
	2. Devising improvement plans for each site	City Tourism/ Area Based Tourism (ABT) /Site owners	CTT/Agencies/ Sponsors		X	X	No. of plans developed Progress with implementation
	3. Continuous monitoring of conditions at iconic sites	City Tourism/ Area Based Tourism (ABT) /Site owners	CTT/Agencies/ Sponsors			X	No. of monitoring interactions

<table>
<tr><th rowspan="2">Strategy</th><th rowspan="2">Activities</th><th rowspan="2">Lead</th><th rowspan="2">Support</th><th colspan="3">Year</th><th rowspan="2">Success indicators</th></tr>
<tr><th>1</th><th>2</th><th>3</th></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>No of improvement actions taken</td></tr>
<tr><td rowspan="3">Strategy 2.2: Sustainable Cape Town Program</td><td>1. Adopting a sustainable tourism assurance scheme, for endorsement, promotion and application by the City and its partners</td><td>City Tourism (Governance)</td><td>Big 6 and key industry players (Implementation)</td><td>X</td><td></td><td></td><td>No. of subscribing/supporting operators and attractions</td></tr>
<tr><td>2. Spearheading a sustainable city publicity initiative</td><td>City Tourism</td><td>CTT/Sponsors</td><td></td><td>X</td><td>X</td><td>Value of media coverage
No. of media reports</td></tr>
<tr><td>3. Continuing and strengthening the Universal Access in tourism initiative</td><td>City Tourism/TDA (Planning)</td><td>City departments/Province</td><td></td><td>X</td><td>X</td><td>No. of properties adhering</td></tr>
<tr><td>Strategy 2.3: Spatial Planning Program</td><td>1. Integrating local area spatial tourism concepts for high-potential developing tourism areas in the City's spatial planning frameworks</td><td>City Tourism/TDA</td><td>Area Based Tourism (ABT)</td><td></td><td>X</td><td>X</td><td>No. of tourism specific areas included in spatial plans
No. of new attractions/destinations developed
Growth in visitor numbers to key tourism areas</td></tr>
<tr><td colspan="8">Goal 3: Stimulating demand</td></tr>
<tr><td>Strategy 3.1: Joint Leisure</td><td>1. Formulating a collective 3-year marketing strategy</td><td>City Tourism</td><td>CTT/Wesgro/Province</td><td>X</td><td></td><td></td><td>Agree joint marketing strategy</td></tr>
</table>

Strategy	Activities	Lead	Support	Year 1	Year 2	Year 3	Success indicators
Marketing Expansion program	2. Executing a "14 Days of Splendour[4]" all-year-round promotion campaign	CTT	City Tourism/ Area Based Tourism (ABT)/Sponsors		X	X	Growth in tourist arrivals and expenditure
	3. Launching a niche market promotion drive	CTT	City Tourism/ Area Based Tourism (ABT)/Sponsors		X	X	Growth in clientele of special interest operators
Strategy 3.2: Air, Rail and Cruise Access Program	1. Continuing to work with and support the Cape Town Air Access Initiative and other similar initiatives	City Tourism	Wesgro/CTT/ACSA	X	X	X	No. of existing services sustained per annum Extent of additional capacity launched Expansion to new destinations
Strategy 3.3: Expanded MICE and Events Marketing Program	1. Expanding MICE (Meetings, Incentives, Conventions and Exhibitions) marketing focus and resources	City Tourism	Wesgro/CTT	X	X	X	Growth in number of conventions hosted Growth in number of MICE delegate
	2. Leveraging maximum tourism value from sport and cultural events	City Events	City Tourism/CTT/Wesgro	X	X	X	Growth in economic impact of events
Goal 4: Generating Community Involvement, Benefits and Support							
Strategy 4.1: Cultures of Cape Town Development Program	1. Launching local areas cultural tourism initiative	City Tourism/ Area Based Tourism (ABT)	CTT/City Departments	X	X	X	New routes and products introduced and sustained
	2. Setting up local Tourism Forums	Area Based Tourism (ABT)	City Tourism/City departments		X	X	No. of local forums established

[4] "14 Days of Splendour" is an indicative campaign name to indicate that the objective should be to retain visitor in Cape Town for a longer period; a suitable campaign name and identity should be developed as part of the initiative

Strategy	Activities	Lead	Support	Year			Success indicators
				1	2	3	
	3. Implementing various capacity development programs in selected local areas	Area Based Tourism (ABT)	CTT	X	X	X	No. of capacity building initiatives conducted as per plan
	4. Packaging and marketing cultural experiences	CTT	Area Based Tourism (ABT)		X	X	Growth in visitors participating in cultural experiences
Strategy 4.2: Community Tourism Engagement Program	1. Launching the Cape Town Tourism Schools initiative	City Tourism/ Area Based Tourism (ABT)	CTT/Industry/Sponsors	X	X	X	No. of participating schools No. of participating learners
	2. Launching a Tourism Employee Ambassador initiative	City Tourism/Industry Bodies	Area Based Tourism (ABT)/Mayoral Awards		X	X	No. of participating businesses No. of participating employees
Goal 5: Organising for Growth							
Strategy 5.1: Tourism Partnerships Program	1. Engaging partners in a collective tourism marketing initiative	City Tourism	CTT/Industry/Wesgro	X	X	X	Key partners involved Extent of collective funding raised
	2. Forming a City Tourism coordinating cluster	City Tourism	E&I/Mayco	X	X	X	Attendance of cluster meetings No. of initiatives addressed
	3. Engaging in bilateral tourism development partnerships	City Tourism	Other national and provincial agencies/Mayor		X	X	No. of working partnerships and agreements
	4. Coordinating Local Area Tourism initiatives	Area Based Tourism (ABT)	City Tourism/CTT/Wesgro		X	X	No. of working local area tourism initiatives
Strategy 5.2: City Tourism Capacity Enhancement Program	1. Strengthening the tourism function in the City	City Tourism	Area Based Tourism (ABT)	X			Extent of implementation of TDF

Strategy	Activities	Lead	Support	Year			Success indicators
				1	2	3	
							Extent of additional staff capacity No. of partnership agreements for implementing TDF
	2. Collecting and analysing tourism performance statistics and research	City Tourism	CTT/Industry/Wesgro	X	X	X	Quarterly barometers published No. of visitor interviews conducted
	3. Increasing funding for tourism development and marketing	City Tourism/ Area Based Tourism (ABT)	City Budget Committee	X	X	X	Increase in tourism destination expenditure
	4. Continuously monitoring progress with implementing the TDF	City Tourism	-	X	X	X	Quarterly review meetings held Revising the TDF where required

Acronyms

ACSA –	Airports Company of South Africa
AR –	Augmented Reality
ASATA –	Association of Southern African Travel Agents
ATMs –	Air Traffic Movements
BBEE –	Broad Based Black Economic Empowerment
CAGR –	Compound Annual Growth Rate
CBD –	Central Business District
CEO –	Chief Executive Officer
CoCT –	City of Cape Town
CTAA –	Cape Town Air Access
CTT –	Cape Tourism
FEDHASA –	Federated Hospitality Association of South Africa
GDP –	Gross Domestic Product
GVA –	Gross Value Added
ICT –	Information Communication Technology
IDP –	Integrated Development Plan
JAMMS –	Joint Association Members Meetings
LoS –	Length of Stay
MICE –	Meetings, Incentives, Conventions and Exhibitions
NDT –	National Department of Tourism
NGO –	Non-governmental Organisation
NTSS –	National Tourism Sector Strategy
RDE –	Real Daily Expenditure
SAPS –	South African Police Services
SATSA –	Southern Africa Tourism Services Association
SMME –	Small, Medium and Micro Enterprises
SWOT –	Strengths, Weaknesses, Opportunities, Threats
TDF –	Tourism Development Framework
TMAC –	Table Mountain Aerial Cableway
TMNP –	Table Mountain National Park
UA –	Augmented reality
UNWTO –	United Nations World Tourism Organisation
VIC –	Visitor Information Centre
WCED –	Western Cape Education Department

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Appendix A: Progress with TDF 2014-2018

Strategic Focus Area	Project	Progress
Projects Identified for short-term implementation		
Generate Growth and Create Jobs	Responsible Tourism enhancements – awareness, awards and other incentives	Responsible Tourism Guidelines for 2010 FIFA WC remain in use. From Report "Responsible Tourism Policy for Cape Town (2009)"
Diversify Source Markets and Products	Increase business tourism and MICE market – targeted marketing	Major events sponsorship through City Events Department
	Cultural Heritage Trail with improved tourism interpretation centres and infrastructure	No progress reported Various on-going initiatives
	Monwabisi Node Development – resort development, False Bay Marathon and other activities	The Monwabisi Resort chalets was upgraded. High-level conceptual plan was undertaken to integrate urban development and the resort. Talks with NDT to fund by Sport and Recreation department. Previous funding allocation lapsed due to absence of implementation plans Coastal Economic Strategic and Spatial Development Plan (CESSDP) developed, which has identified potential development projects for realising the benefits of the coast. Approval delayed due to uncertainty around the ODTP. Process underway of outsourcing development and operation of overnight resorts at Miller's Point, Voortrekker Park and Hendon Park.
	Creative tourism platform – exposing tourists to a range of participative creative experiences	No progress
	Khayelitsha Train Tour – logistics, ticketing, itinerary etc.	No progress
	Tafelberg Road market	Tafelberg Road is a major proclaimed scenic route and also provides access to the mountain for fire management. Therefore the road cannot be closed for the development of a market.
	Modila Museum of Design, Innovation, Leadership and Arts	No progress
Support Interventions	Targeted SMME support program	No progress
	Southern Line Rail Route	30 000 Hop On Hop Off Tourist Pass tickets sold between 2014 and March 2017 by Metrorail/PRASA on the Southern Line. There is a blog on the PRASA website selling the Tourist Pass Ticket as an experience and a transport mode. Metrorail/PRASA

Strategic Focus Area	Project	Progress
		also has placed various events on the Blog relating to rail tourism. Cape Town Tourism also has a reference to the Southern Line in their Visitor Guide.
	Campaign and program to promote innovation and quality among tourism businesses	No progress
	Smart information centres and improved tourism signage, interactive kiosk and app	13 Information centres reduced to 5 Move towards electronic visitor apps and information boards Tourism interpretation signage and maps – stories, You are Here Maps (Muizenberg, CBD and Langa) - Interpretation Stories (Muizenberg, Sir Lowry's Pass Village and the Cape Town Station) RTLC committee responsible for the brown road tourism signage application and approval process
Projects Identified for medium-term implementation		
Diversify Source Markets and Products	Tourism integration with District 6 planning	No progress
	Long Street pedestrianisation	No appetite for this project by City Planning and Transport department. "You are Here" maps were updated in CBD area
	Culemborg – shipping heritage museum and accommodation potential	No progress
	Athlone Power Station	Draft development plan –minimum tourism impact currently – long term plan and tourism value to be added later in the process. Site has potential tourism value especially from a visual point of view if the iconic towers remain.
	Old Quarry and Noon-gun funicular	No progress
	Harbours and beachfront development – Hout Bay, Strand, Silwerstroomstrand	Conceptual development plan formulated for Silwerstroomstrand. High level conceptual plan formulated for Helderberg Coastal park. Pavilion Precinct Upgrade completed Langa Gateway Beautification underway Muizenberg UA access to the beach and across the rail line completed Muizenberg pedestrian route and link to old town completed Gordon's Bay walk completed to Whale Point
	Stellenbosch-Bellville site: training centre, educational tourism, accommodation	No progress
	Observatory Lower main Road information centre	No progress – change in information strategy

Strategic Focus Area	Project	Progress
	False Bay Ecology Park	Various initiatives: Zeekoevlei redevelopment, RAMSAR Site, Strandfontein Birding site, Designs for bird hides at Rondevlei, Coffee Shop.
	Kogel Bay Biosphere Information Centre, Restaurant, Resort	High level conceptual plan – needs an EIA
	Blaauwberg Conservation Area	Blaauwberg Nature Reserve proclaimed, coastal hiking trail, annual Battle of Blaauwberg festival, cycle path Big Bay to Melkbos developed, hiking accommodation on the Blaauwberg Hill developed and recently received the Green Coast Flag.
Support Interventions	Database of tourism products and services	GIS tourism Data Viewer and Editor developed - tourism layers of information have been made available on The City's Open Source Database for access by any person. The Open Data Policy and access to open data portal. Work underway to make the other data available.
	Tourism Safety forum	Bi-annual meeting of public and private partners Deployment of ambassadors during peak season Sanparks Bambanani volunteers Safety communication through various media, emergency numbers
Other projects implemented and not listed in TDF		
	Increase domestic tourism	CTT Domestic Winter Campaign
	International marketing	CTT participated in various international marketing exhibitions & road shows. Study done on adventure tourism
	Robben Island revitalisation	On-going discussions between Museum and City to improve tourism conditions to and on the island
	Industry collaboration – tourism forum	JAMMS sessions established – 15 sessions Cape 365 forum, 2 conferences and organising committee
	Universal access	Awareness Campaign with posters developed. Still needs to be rolled out to all tourism product owners by the City and Cape Town Tourism. Tourism In Universal Access website was developed to share information on facilities that have universal access facilities and was supported by the City and Cape Town Tourism.
	Cape Town's Military Heritage Route	Route launched in collaboration with Simon's Town Naval Base. Map printed and in CCT website and brochure

Appendix B: Tourism Performance

Tourism Economic Contribution – Gross Value Add (GVA)

Tourism is a major value-adder to the economy and a job intensive industry, responsible for contributing between 2% and 3.5% to the local economy and sustaining 3% to 5% of all jobs in Cape Town. However, tourism GVA declined substantially between 2011 and 2016 and while all indications are that the tourism economy recovered well between 2015 and 2017, the industry has been struggling since the onset of the water crisis in late 2017.

Fig. 1: Tourism Gross Value Added (GVA) and Employment in South Africa and Cape Town, 2009-2016

		Total gross value add	Tourism GVA as % of Total GVA	Employment	Tourism GVA as % of Total GVA
2009	**South Africa**	64 271	3.00%	553 990	4.1%
2009	**Cape Town**	7 501	3.31%	64 654	5.2%
2010	**South Africa**	76 604	2.90%	603 022	4.4%
2010	**Cape Town**	8 645	3.46%	68 051	5.6%
2011	**South Africa**	77 341	2.80%	622 929	4.4%
2011	**Cape Town**	8 090	3.01%	65 159	5.4%
2012	**South Africa**	86 850	2.90%	646 390	4.5%
2012	**Cape Town**	8 016	2.77%	59 660	4.9%
2013	**South Africa**	94 497	3.00%	655 587	4.4%
2013	**Cape Town**	7 255	2.32%	50 334	4.1%
2014	**South Africa**	104 000	3.00%	681 915	4.5%
2014	**Cape Town**	6 526	2.05%	42 793	3.4%
2015	**South Africa**	99 348	2.70%	668 651	4.2%
2015	**Cape Town**	6 098	1.88%	41 042	3.2%
2016	**South Africa**	114 850	3.00%	686 596	4.4%
2016	**Cape Town**	6 317	1.91%	37 766	2.9%

Historical and Recent Performance

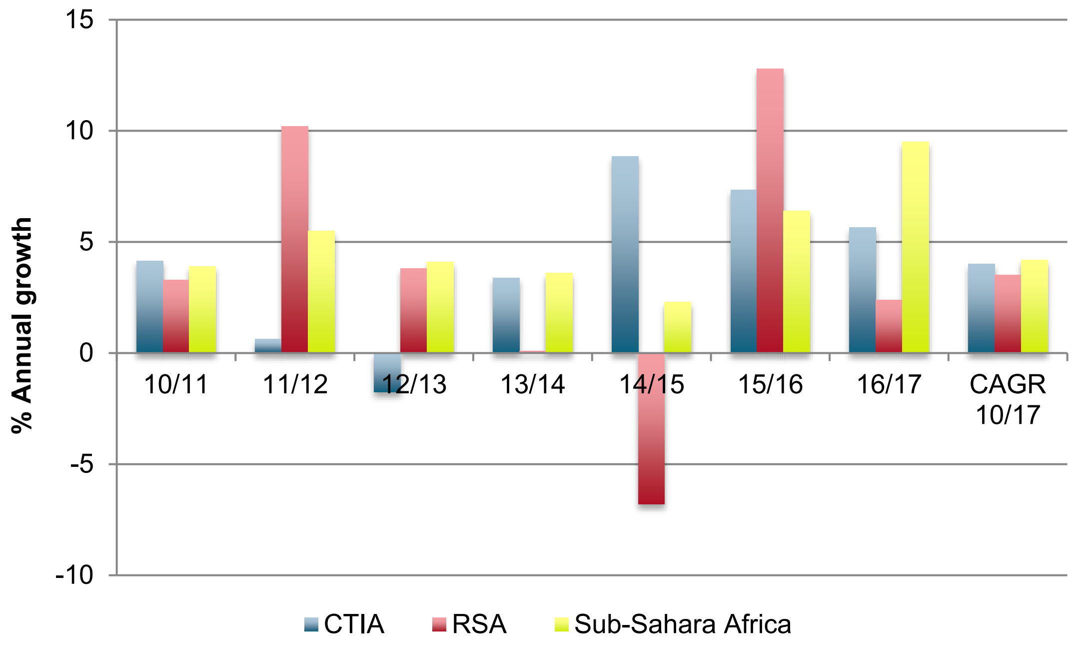
- Fig. 2 presents various indicators of tourism performance in Cape Town and shows that here has been a dip in foreign tourist arrivals following 2010 FIFA World Cup, with negative Compound Annual Growth Rate (CAGR) 2011-2015.There as a recovery in arrival numbers in 2016 and 2017, however a shorter average length of stay resulted in limited gains in tourism expenditure.
- Domestic tourist arrivals have declined substantially since 2013.
- Fig. 3 compares growth in passenger arrivals at Cape Town International Airport with growth in foreign tourist arrivals to South Africa and Sub-Saharan Africa. While there appears to be limited correlation of growth rates on an annual basis (probably due to lags in data calculations), the CAGR in passenger arrivals at CTIA is slightly below the CAGR in tourist arrivals in Sub-Saharan Africa (4.0% vs. 4.2% p.a.) and is slightly higher than the CAGR for tourist arrivals to South Africa when considering the entire seven-year period.

Fig. 2: Indicators of Tourism Growth in Cape Town, 2010-2016

Indicators of Tourism in Cape Town	2010	2016	CAGR %
Number of Overnight Tourists			
Foreign Tourists	1 412 911	1 502 486	1.0%
Domestic Overnight Tourists	810 000	670 350	-3.1%
Average Length of Stay (Nights)			
Foreign Tourists	9.4	8.0	-2.8%
Domestic Overnight Tourists	7.3	7.4	0.3%
Bednights Sold			
Foreign Tourists	13 328 767	11 972 675	-1.8%
Domestic Overnight Tourists	5 899 080	4 977 753	-2.8%
Average Spend per Day			
Foreign Tourists	1 087	1 080	-0.1%
Domestic Overnight Tourists	229	229	0.0%
Total Direct Tourism Spend (R'bn)			
Foreign Tourists	14.5	12.9	-1.9%
Domestic Overnight Tourists	1.4	1.1	-2.8%
Total Direct Tourism Spend (R'bn)	15.8	14.1	-2.0%

Source: Grant Thornton for City of Cape Town, 2017

Fig. 3: Annual Growth in Passenger Arrivals at CTIA vs. Tourist Arrivals in RSA and Sub-Saharan Africa, 2010-2017



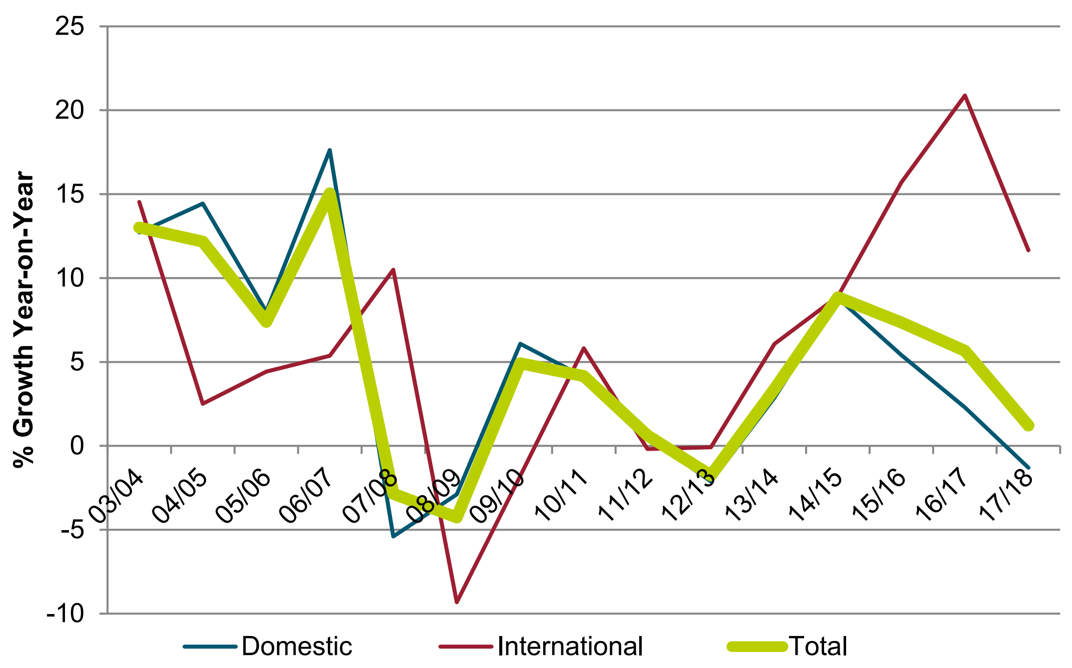
Sources: CTIA, 2018 and UNWTO, 2018

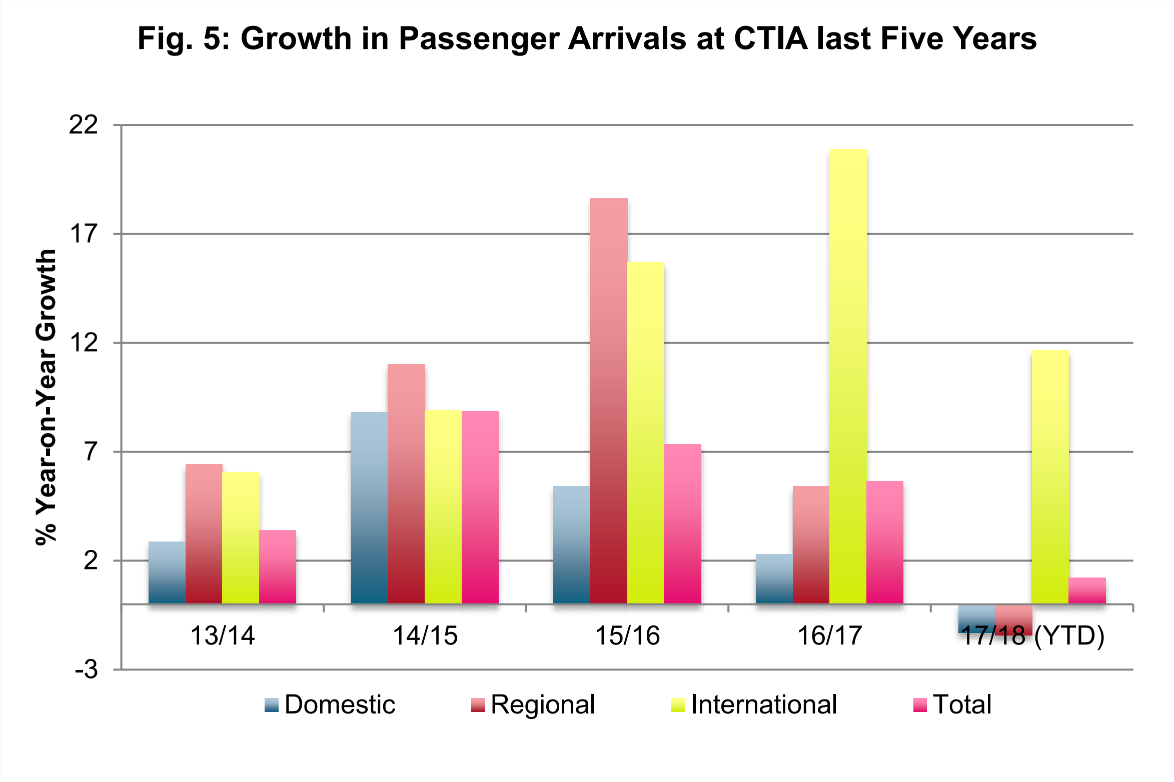
Recent Performance: Passenger Trends CTIA

- Growth in arrivals at CTIA averaged 5.1% p.a. over the past 15 years. On average domestic arrivals grew at just under 5% p.a. and international arrivals at 5.7% p.a. Growth has slowed since 2010 and the annual growth rate between 2010 and 2017 was under 4%, which included almost 8% p.a. for international arrivals and only 3% p.a. for domestic arrivals.
- While total passenger arrivals grew at double-digit percentages during the period 2003-2008, arrivals declined during the global economic crisis of 2008 and 2009 and have struggled to recover thereafter.
- During the period 2008-2013, growth in arrivals remained modest at below 5% per annum on average and arrivals even declined in 2013. Growth picked up well between 2015 and 2017 due to successes of Air Access Program and the value-for-money proposition induced by a weakening currency.
- The high growth in international passenger arrivals over the past 3 years has displaced some of the traditional international passenger volumes on domestic flights, with domestic passenger arrivals declining in 2018.

While there has been continuous growth in total passenger numbers over the past 3 years, annual % growth has declined from almost 9% p.a. in 2015, to just over 1% for the first 9 months of 2018, compared to the same period in 2017.

Fig. 4: Growth in Passenger Arrivals at CTIA, 2004-2018





- Following an almost 9% growth in Total Air Traffic Movements (ATMs) in 2015, ATM growth has stabilised at 1%-2% to take up additional capacity created and the period January – September 2018 has seen a decline in total ATMs for the first since 2014.
- The modest Total ATM growth figures over the past three years mask the excellent growth achieved in international flights, with international ATMs growing at between 15% and 35% p.a. over the past four years.
- Regional ATMs from SADC have also largely stabilised following major growth in 2015, but the substantial decline in ATMs during the first 9 months of 2018 is of concern.
- As reflected in passenger numbers the growth in international flights has displaced some domestic flights, leading to slow growth in Domestic ATMs and a decline during the first 9 months of 2018.
- Seasonality remains a challenge and passenger arrivals in June is on average 35%-40% lower than in December.

Fig. 6: Growth in Passenger and Air Traffic Movements, 2014-2018

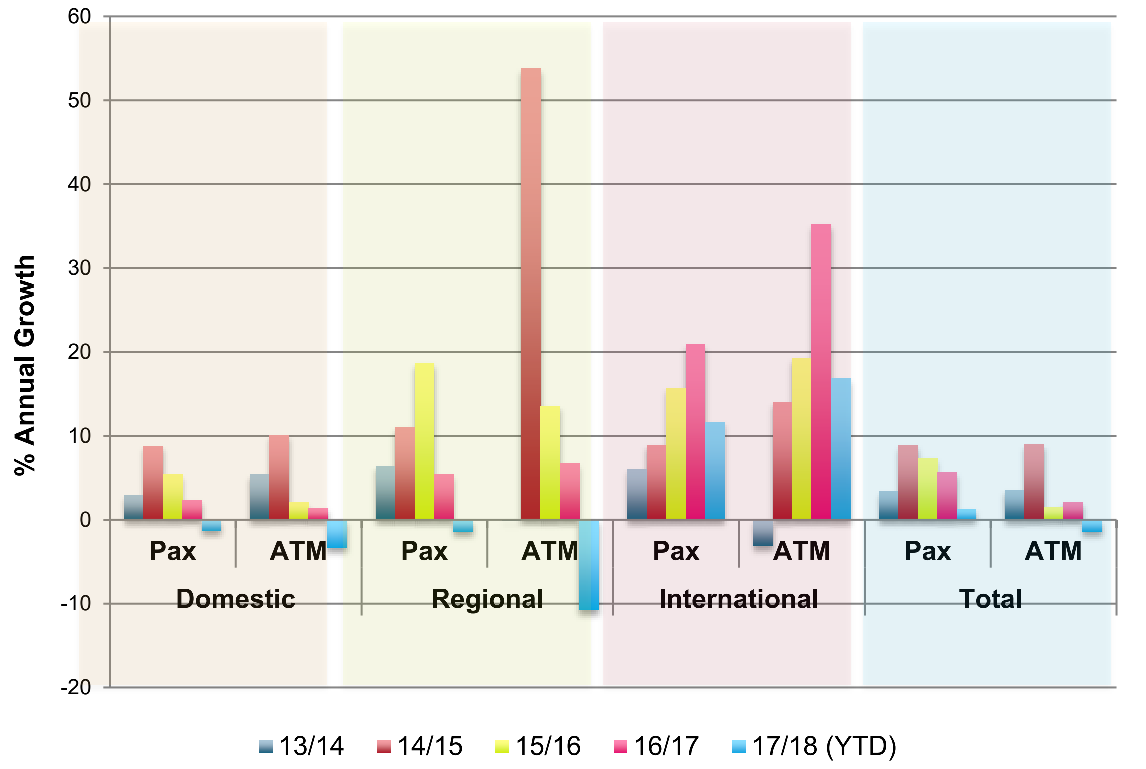
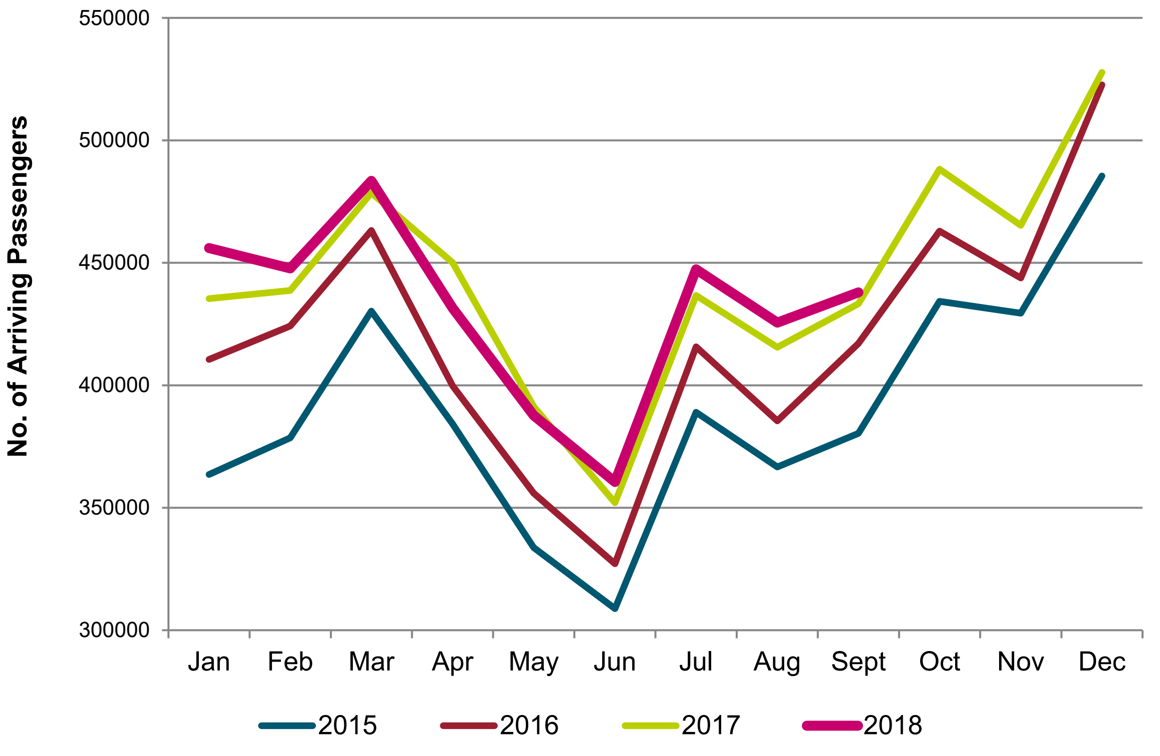


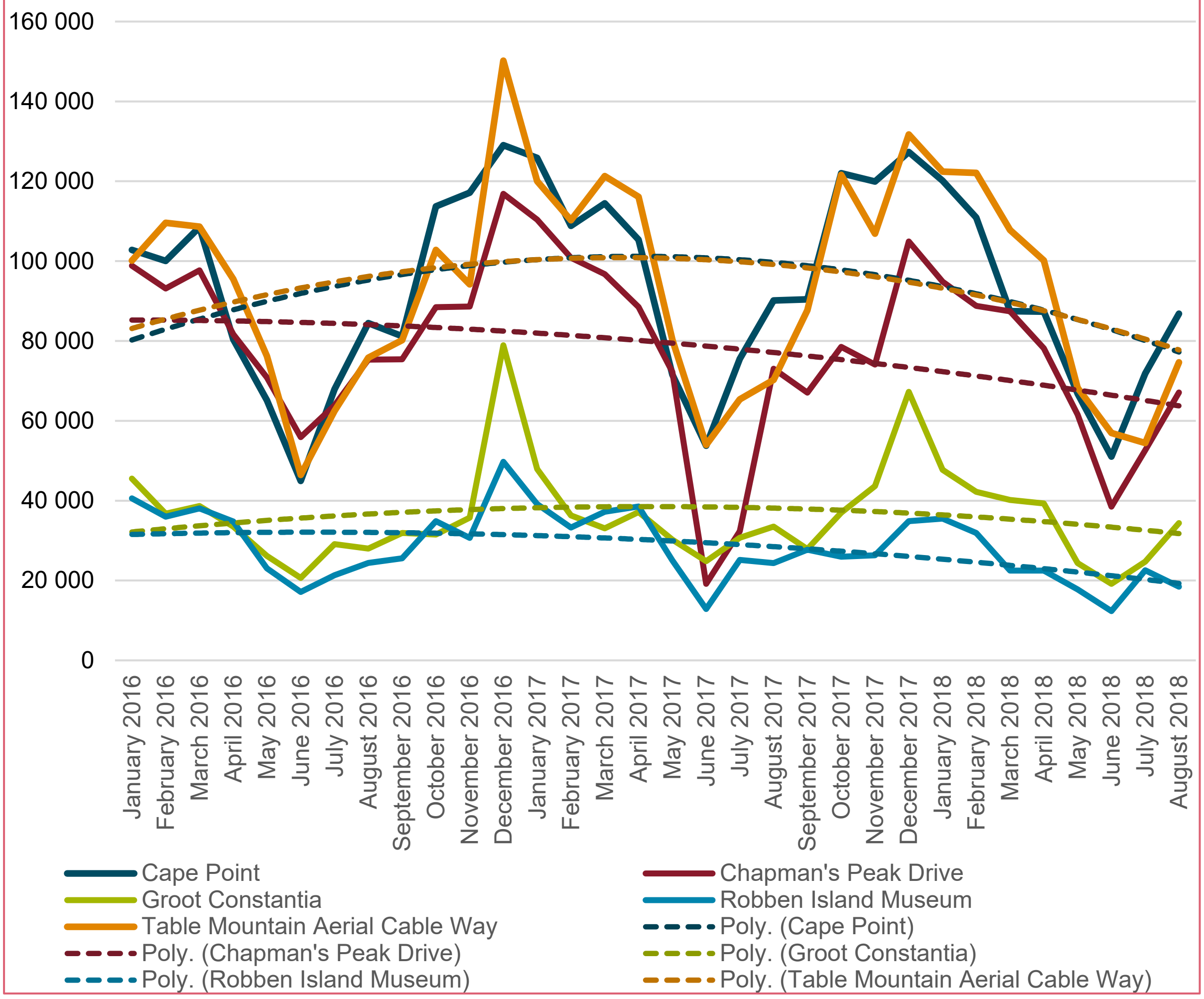
Fig. 7: Monthly Passenger Arrivals at CTIA, 2015-2018



Recent Performance: Visitor Trends at Key Tourist Attractions

- The 2016-2017 growth spurt in tourism is reflected in visitor numbers received at TMAC, Cape Point and the Chapman's Peak Drive tollgate.
- The positive growth trend continued through 2016 until end 2017, but started tapering off as the water crisis hit towards the end of 2017 and with a rapid fall-off and real decline in visitor numbers from March 2018 onwards. Both the peak month of March and the "shoulder season months' of April and May 2018 suffered substantial declines compared to 2017 and this trend continued through the winter season months of June and July 2018. The trend for August 2018 seems positive, though.
- The polynomial trend lines show that visitor arrivals are on average similar to what they were in 2016 despite the 2016-2017 growth period.
- The consistent decline in visitor numbers to Robben Island is of particular concern and requires further analysis and action.

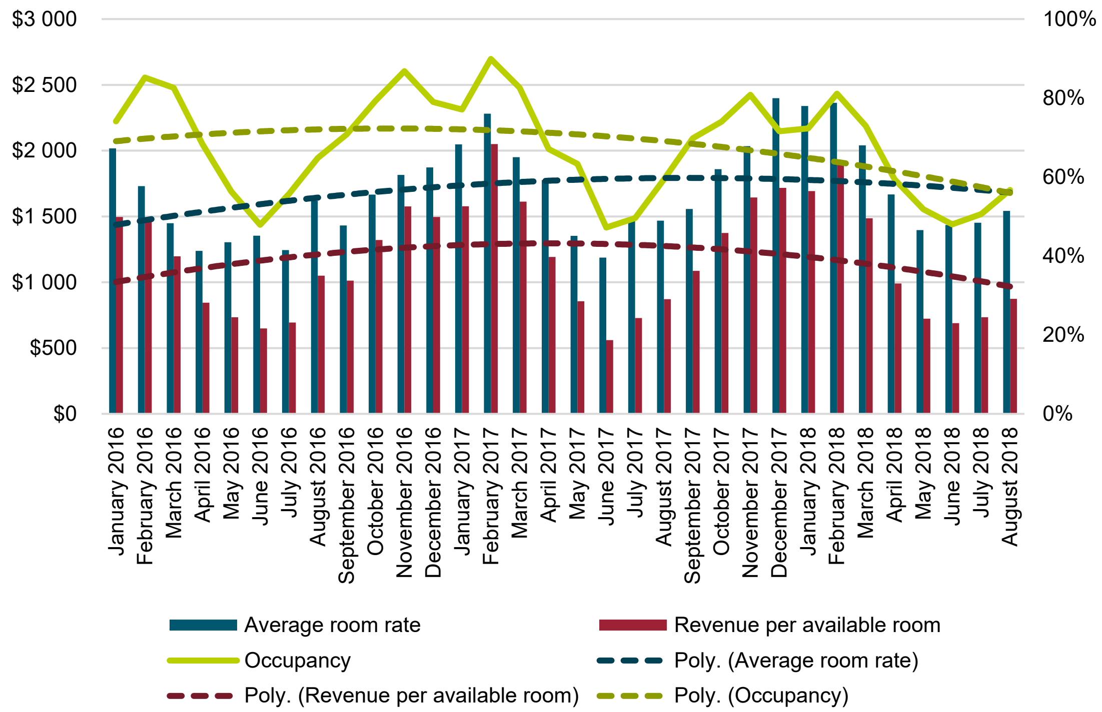
Fig. 8: Visitor Numbers recorded at Key Tourism Attractions in Cape Town, 2016 - 2018 (Ex. V&A Waterfront)



Recent Performance: Accommodation

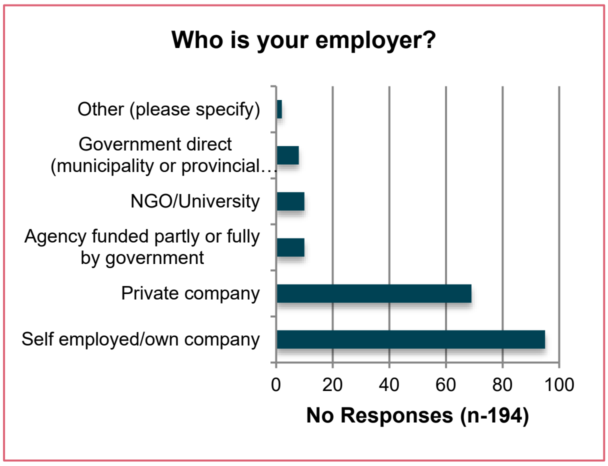
- The demand trends highlighted in previous graphs have had a substantial impact of accommodation performance.
- The combination of added room capacity in the hotel sector and slowdown in demand has resulted in average monthly occupancy rates dropping off sharply since the latter part of 2017 and leading into 2018 (green line).
- Potential resultant revenue losses have been largely offset by increased average room rates (blue line), resulting in stagnant average nominal RevPar figures. In real terms (after inflation) RevPar has declined significantly in 2018 compared to 2017 and even 2016.
- Based on statistics gathered by the main hotel groups, the hotel business in Cape Town Jan – Sept 2018 was down 11.6% in RevPar (– 9.1% volume) & (-2.7% ARR) on the same period 2017, resulting in revenue declining by R532 m in accommodation revenue

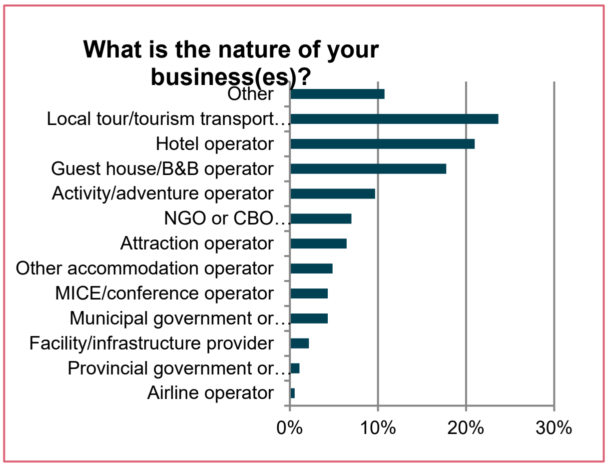
Fig. 9: Trends in Accommodation Performance 2016 - 2018

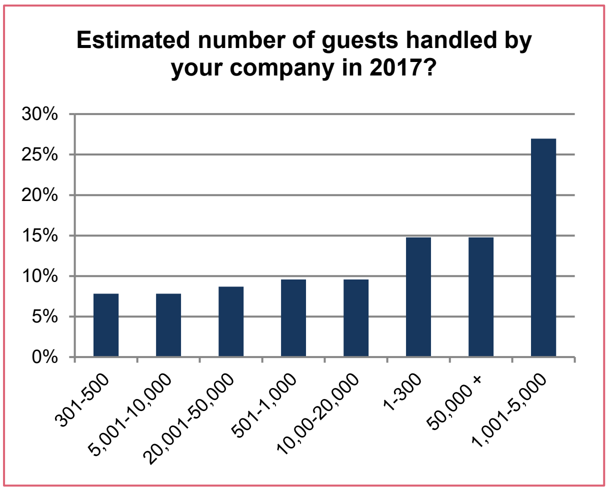


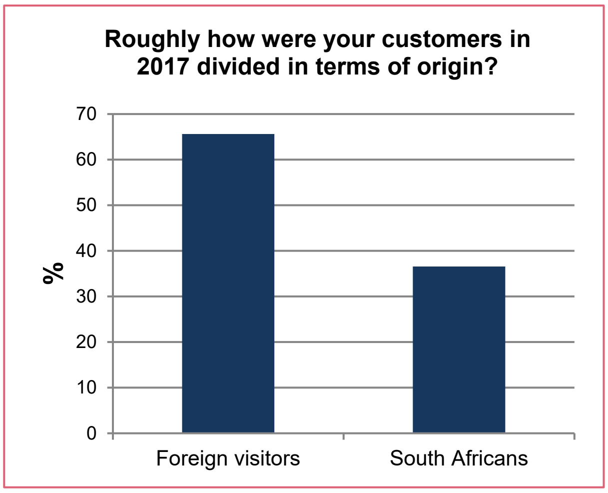
Appendix C: Stakeholder Survey Results

1. Profile of respondents



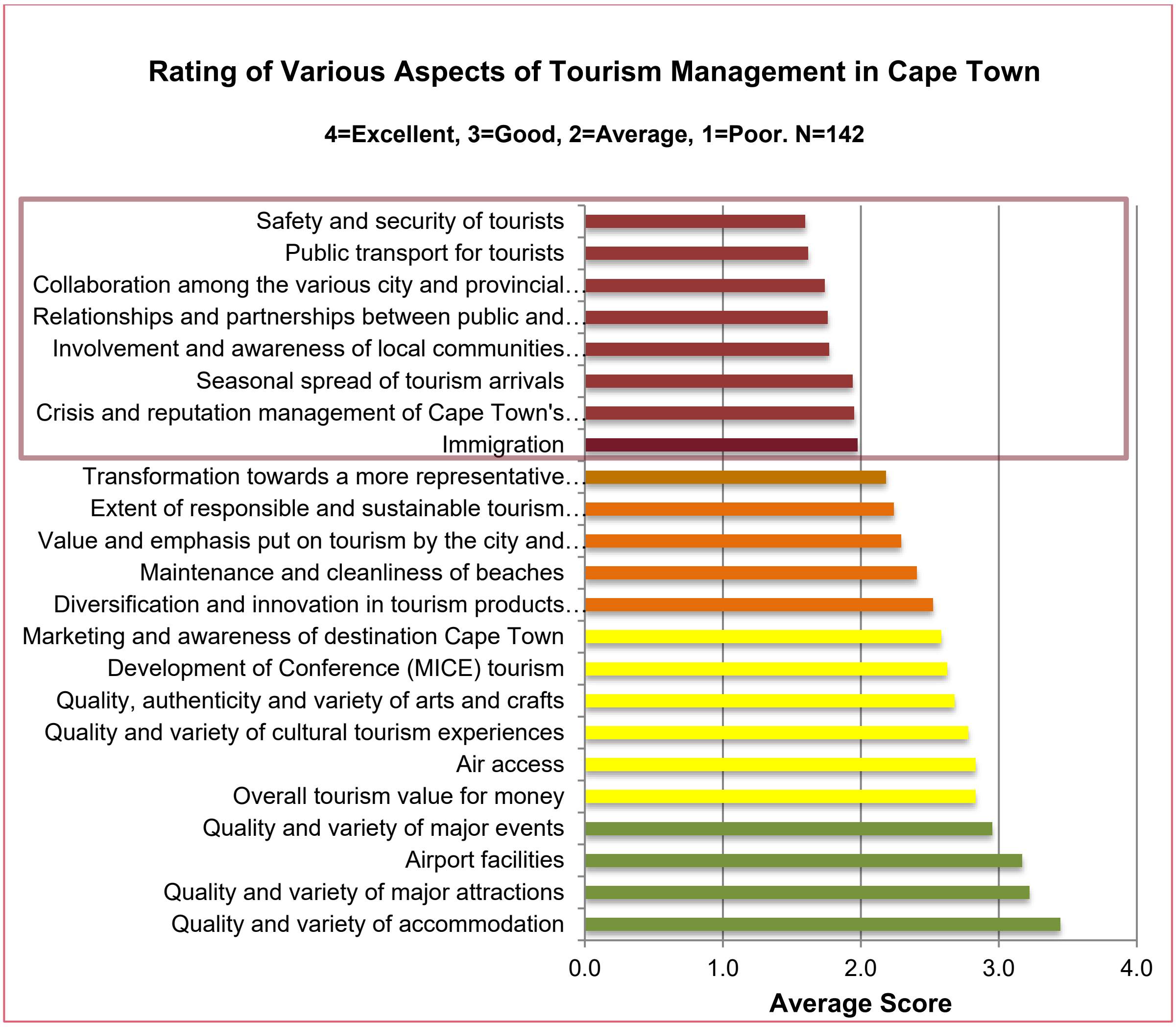






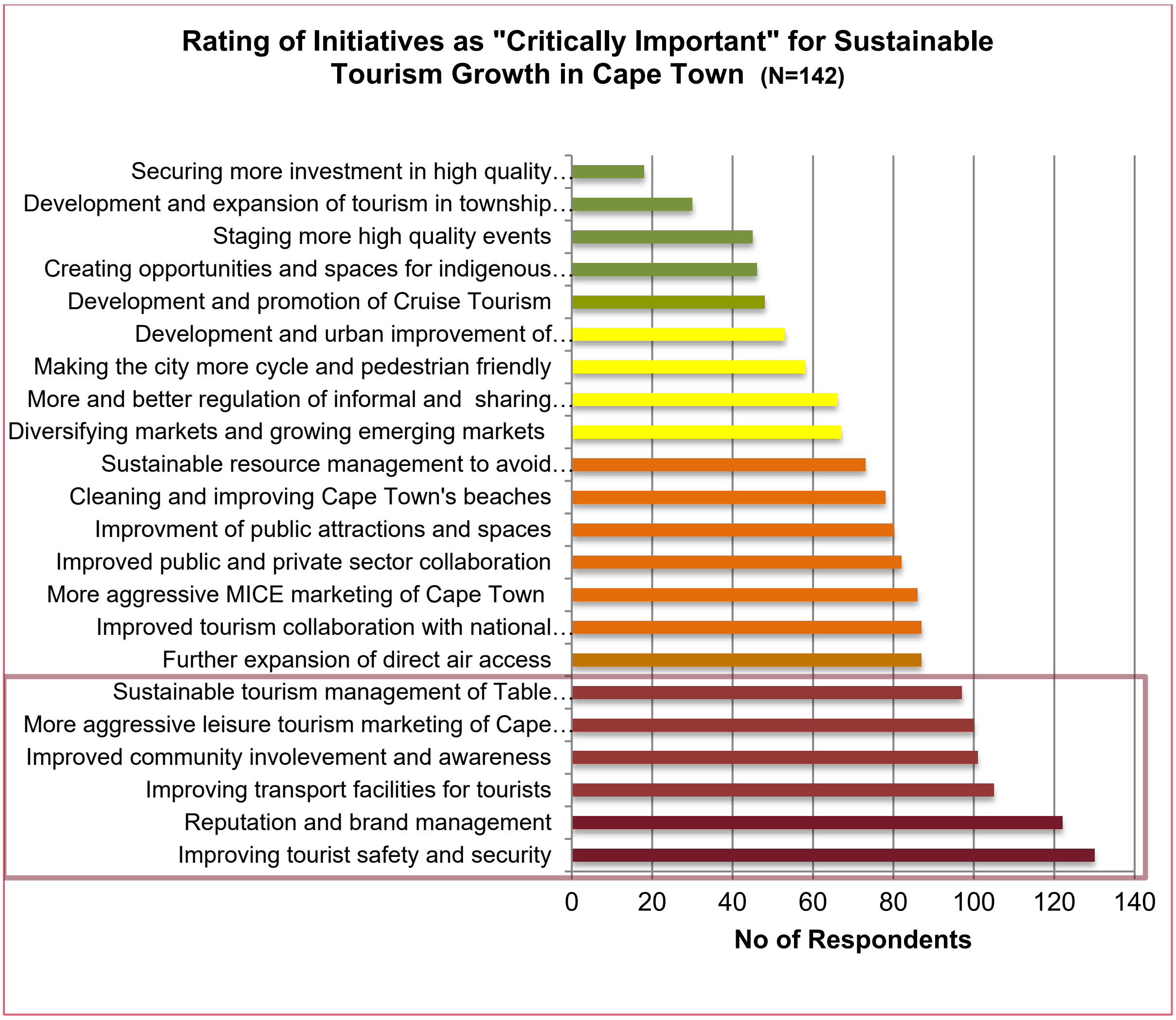
2. Industry Rating of Various Aspects of the Destination Value Chain

- Aspects deemed **Good to Excellent**: Quality and variety of accommodation, quality and variety of major attractions, airport facilities, quality and variety of major events
- Aspects deemed **Average to Good:** Value for money, air access, quality and variety of cultural tourism experiences, quality and variety of arts and crafts, development of MICE tourism, marketing and awareness of destination Cape Town
- Aspects deemed **Average**: Diversification and innovation of tourism products/experiences, maintenance and cleanliness of beaches, value attached to tourism by government authorities, extent of responsible/sustainable tourism, industry transformation
- Aspects deemed Below **Poor to Average**: Immigration facilities and services, tourism crisis and reputation management, seasonal spread of tourism, local community tourism awareness and involvement, public-private relationships, inter-departmental collaboration, tourism public transport, safety and security of tourists (lowest rating)



3. Industry Rating: Aspects rated as Critically Important for the CoCT to Address

- By 100-130 out of 142 respondents (**Highest Priority**): Tourism safety and security (130), destination reputation and brand management (122), tourism transportation services (105), leisure marketing (100), sustainable management of TMNP (97)
- By70-96 out of 142 respondents **(Priority)**: Further expansion of direct air access, collaboration with national tourism authorities, MICE marketing, public-private sector collaboration, improvement of public attractions and spaces, cleaning and improving our beaches, sustainable/responsible tourism management
- By 49-70 out of 142 respondents **(Moderate Priority):** Diversifying markets, more regulation of informal tourism economy, making the city more cycle and pedestrian friendly, development and improvement of underdeveloped tourism areas
- By 18-48 out of 14 respondents **(Low Priority)**: Development of cruise tourism, creating more opportunities for indigenous cultural interactions, staging more events, development of township tourism, securing more investment in accommodation facilities



4. Industry suggestions and comments regarding any major tourism intervention(s) that could contribute to dynamic and sustainable tourism growth in Cape Town during the next 5 years. (n=73)

Safety / removal of beggars and illegal structures
1. Political stability to improve on safety perception (i.e. doing away with violent strikes and continuous service protests
2. Safety and security, clear the streets from vagrants, thief's, beggars and keep areas clean **(24)**
3. Affordable housing and removal of illegal structures

Events / sport / conferences
1. Bring back the iron Man
2. Move rugby to Stadium
3. Celebrity artists hosting concerts in the city e.g.: stadium
4. Skateboarding & Street Art Project in Townships
5. Hosting more global conventions- an opportunity for local members to meet and greet
6. another world cup hosting, we have the facilities
7. May to August need big events as draw card during these months.

Transport / infra structure
1. Air connections (2)
2. Traffic is a major issue **(4)**
3. Improve public transport and tie it in with a City Pass for tourists
4. Making the registration of touring transport vehicles easier and more user friendly.
5. Tourism bus stops / drop off zones for smaller vehicles at city attractions.

6. Maintaining and improving quality of streets.
7. Improve train lines and thus traffic congestion

Regulate accommodation
1. Apply/ enforce the regulations already provided to managing AirB&B (3)
2. Regulating the market in terms of how many accommodation options are allowed per area and standards (2)

Marketing
1. Extensive marketing of ALL areas in Western Cape **(4)**
2. Position Cape Town as a Gateway to Sub Saharan Africa rather than a standalone destination ... Air Access is allowing for this as you can know fly to Namibia, the Delta and Vic Falls direct from CT.
3. More interaction with international tourism organisations to promote Cape Town/Western Cape & South Africa in general
4. Campaigns to promote extended stays in Cape Town as opposed to 1 or 2 nights as a stopover en route to safari
5. Creating more awareness of the entire lesser-known tourism product like neighbourhood tourism by educating international trade. (2)
6. Ensuring we have a dedicated marketing association to keep Cape Town on trend. CTT needs to drop having to generate revenue and focus on objective marketing and brand value with experts.
7. Start promoting and supporting local companies and local innovation. CapeStay, Travelground, Lekkerslaap and many others instead of the global giants (2)

Visas / easier access

1. Easier access into RSA for tourist. **(6)**
2. Immigration on arrival. (2)

All-year destination
1. Cape Town should be an all year round destination, during winter season. we need to attract other market such as Asian, Middle East visitors.

Cultural tourism
1. Bo-Kaap needs its authenticity protected.
2. Create a safe cultural tourism- route between CTIA and surrounding areas such as Nyanga-Gugs-Crossroads-Khayelitsha-Philippi and Samora / Develop more township tours. (2)

Better management/ development of key attractions
1. Robben Island is world class rich in history destination but badly managed, transportation to the Island being the worst / Concession Robben Island out to the private sector with clear deliverables. Improve accommodation options, Start cycle tours on the Island, etc. **(5)**
2. 'Over tourism' will have a negative impact as some key attractions and services cannot cope with the high demands.
3. Maintain and activate existing tourism products such as Sea Point Promenade / Start with what we have and build from there.
4. light up Table Mountain again at night like the city use to do. Table Mountain is an icon.

Media reports re water access / sustainability plans /safety
1. Remove negative stigma Associated with Travel Bans by Australia and USA due to alleged unsafe warnings for tourists.
2. Water access information / eliminate the Day Zero PR disaster. **(5)**
3. Promote sustainability. (2)

Collaboration / support Cape Town Tourism
1. Support Cape Town Tourism instead of undermining them. (2)

Community involvement and education

1. The new changes / improvements need to also have the local community members in mind too. Focus groups and consultations could be one way of having an inclusive opinion of their experience too. (2)
2. Have exchange programmes between different attractions/destinations/SMMEs would be one way the industry educates each other.
3. Education drive to inform Capetonians (even at school level) of the value of their city's assets and how they need to value and share them, their role and how they can benefit from it.

<u>Illegal guide control</u>

1. Illegal guiding control. (badge, PDP, Operating License)./ Accreditation of Wine Tourism guides / better standard of guides.

<u>Recruitment and job creation</u>

1. Facilitate tourism industry growth and job creation by efficient and timely handling of transport and tourist permits for tour operators. It is in the interest of everybody to provide a modern fleet of vehicles for our tourists. Currently it takes up to 2 years to register a new vehicle.
2. video recruitment service enabling those who do not have a strong CV to make it to the interview process!
3. In Tourism industry more collaboration initiatives needed between government and institutions that offer training.

<u>Adventure/ food/ eco-tourism /other</u>

1. Promote cape town as an adventure and activities hot spot (2)
2. Eco tourism,
3. Foodie tourism" to leverage the amazing restaurant and artisan food industry
4. Focus on emerging markets that would be an easy conversion such as Halal Tourism and LGBTQ tourism.
5. Vibe is needed.

<u>Business laws</u>

1. improvement in business laws to make it easier to open foreign businesses in Cape Town.

<u>IT training</u>

1. Educating the tourism industry about software technology that can help their business.
2. Keep our vital supporting IT skills in Cape Town. Start a Cape Town innovation and technology. tourism hub dedicated to solving the marketing & staying on puzzle trend.
3. Start a smart collaborative online strategy with your members.

Appendix D: Relevant National Legislation, Policies and Plans

The TDF does not stand in isolation and the following legislation, policies, and plans should be considered in drafting and implementing the strategy.

National Tourism Act, Act 3 of 2014

The act covers a wide range of tourism management arrangements and promulgated by the national Ministry of Tourism, of which the following bear specific relevance to City of Cape Town:

Chapter 1

Section 2 Objects of the Act: (1) (a) Promote Responsible Tourism; (1) (e) To enhance cooperation between all spheres of government in developing and promoting tourism.

Section 3 Conflict with other laws: (1) (c) In the event of any conflict between this Act and a municipal~~0la~~ by-law, this Act prevails; (2) (a) This Act binds all organs of state in the national and local Spheres of government.

Chapter 2

Section 4 National tourism sector strategy: (5) The Minister and relevant organs of state must give effect to the national tourism sector strategy when performing any function in terms of this act.

Section 6 Information on tourism businesses: (1) The Minister may…establish and maintain a database of information on tourism businesses; (2) (d) The Minister may….in this regard determine the place and manner for the submission of information, which may include submitting information to any organ of state; (4) …must be made with the concurrence of the organ of state concerned.

Section 7 Norms and standards for tourism: (3) Organs of state…must apply the norms and standards determined; (4) The norms and standards …may relate to matters such as the form of business and management, business hours, facilities that must be available, staff and training requirements, information and displays, signage and identification that must be used.

Section 8 Codes of good practice for tourism: (b) The minister may issue codes of good practice to guide conduct of organs of state responsible for developing and managing tourism.

Chapter 3 South African Tourism Board

Section 10 Functions of the Board (b) market South African tourism products and facilities internationally and domestically.

Chapter 6 Tourist Guides

Section 50 Procedures relating to registration of tourism guides: (1) (a) Any person who wishes to be registered as a tourist guide must apply to a Provincial Registrar in the prescribed manner.

National Tourism Sector Strategy (NTSS) 2017

The National Tourism Sector Strategy sets performance targets until 2026 and actions are based on 5 pillars of tourism growth, namely:

- Pillar 1: Effective marketing
- Pillar 2: Facilitate Ease of Access
- Pillar 3: The Visitor Experience
- Pillar 4: Destination Management Practices
- Pillar 5: Broad Based Benefits

Local Government, and by implication City of Cape Town is mentioned as a partner under the following objectives and actions:

Objective	Actions	Partners
Pillar 1: Effective Marketing		
Expand and improve domestic marketing activities and travel	Implement a substantially enhanced and expanded Domestic Tourism Marketing Strategy.	SA Tourism in collaboration with trade and product, provincial and local (particularly cities) government

Objective	Actions	Partners
facilitation programmes		
Pillar 2: Facilitate Ease of Access		
Facilitate ease of doing business to ensure growth of the tourism economy	Investigate how and where the regulatory environment for tourism businesses could be simplified, and develop a programme to work with the relevant authorities at all levels, with particular focus on relieving the regulatory burden on Small, Medium and Macro Enterprises (SMMEs).	NDT, provincial and local government, private sector and relevant Departments
Pillar 3: The Visitor Experience		
Provide tourism experiences and facilities that cater to domestic market segments	Test the viability of government partnering with industry to undertake the effective management and marketing of underutilised state owned tourist facilities such as resorts, campsites, etc.	NDT with local and provincial government in partnership with industry, particularly experienced black entrepreneurs
	Identify State owned assets suitable for lower LSM holiday travel and, develop and implement a turnaround strategy.	NDT, provincial and local government, with private sector
Enhance tourist safety and ensure effective responses to incidents of crimes against tourists	Review and revitalise tourism safety programmes including the Tourism Safety Initiative and expand as required.	NDT, provinces, municipalities, SAPS and industry
	Facilitate the development of a cadre of safety officers in the tourism sector who are able to address safety issues across varying contexts including crime protection and safety (this would be managed through the tourism HRD Strategy).	NDT, provinces, municipalities, SAPS and industry
Pillar 4: Destination Management Practices		
Improve the focus and delivery of tourism marketing and development support provided by provinces and local government.	Develop clear proposals and guidelines, to be formally adopted, on best practice roles and responsibilities in tourism marketing and development across the spheres of government.	NDT, with Provinces, Metros and other local government and relevant marketing agencies. NDT with subject area experts, service providers, with local and provincial government
	Build capacity of provinces and local government in specific areas within confirmed definition of roles and responsibilities linked to priorities in the NTSS.	
	Assess the current capacity as well as the required competencies to fulfil these roles as a necessary precursor to the design of a capacity development programme. This will be disaggregated for different tiers of government officials.	
Pillar 5: Broad-based benefits		
Expand benefits of tourism to rural areas	Review the Rural Tourism Development Strategy and benchmark this against other such strategies. Link this to the transformation and community beneficiation agenda with a particular focus on the factors necessary to create	NDT with key stakeholders, including South African National Parks, Cape Nature, and industry, DRDLR, DEA and DAC and provinces. Also to include industry representatives that are

Objective	Actions	Partners
	an environment that is conducive for rural tourism development. Implement and monitor implementation.	experienced in operating concessions with communities
	Develop strategies of enabling stakeholders to access capacity development, training and mentoring opportunities. Review the supply of skills training for rural stakeholders.	

Institutional arrangements at regional and local level

District/Metropolitan and Local Tourism Forum	• A District multi-stakeholder forum chaired by the Executive Mayor or the Chairperson of the Tourism Portfolio and attended by Local Mayors or Chairpersons of the Tourism Portfolio and supported by officials. Participation should also include the Executive Committee of the Regional Tourism Association to represent private sector interests, and other relevant regional entities, including representatives of provincial tourism department as well as the provincial marketing authority. • The Forum shall deliberate and determine tourism priorities to support tourism growth and development in the region, facilitate cooperation and alignment with provincial tourism development priorities; and confer relevant issues for consideration by the MEC Forum. • The above arrangement can be replicated at a local level.
Regional and Local Tourism Associations	• A regional or local level tourism association constituted by tourism business operators to organise and represent the interests of the private sector speaking in one voice

The South African Tourism Planning Toolkit for Local Government

The Tourism Planning Toolkit for Local Government was commissioned by the National Department of Tourism (NDT) to promote and support tourism planning at a local level. The Tourism Planning Toolkit for Local Government outlines a framework for doing basic tourism planning at local governmental level. The intention of the toolkit is to clarify how to complete a basic tourism plan within a South African local municipality.

The Tourism Planning Toolkit for Local Government is an important contribution towards advancing competence in tourism planning at a local level and sets a minimum standard for such plans.

The Toolkit is based on the VICETS Model for Tourism Strategy Planning, which states that a successful tourism strategy needs to identify how to:

- Welcome, involve and satisfy visitors
- Achieve a profitable and prosperous industry
- Engage and benefit host communities
- Protect and enhance the local environment
- Promote the industry transformation
- Entrench principles of visitor safety

South African Road Traffic Signs Manual & South African Manual for Outdoor Advertising

According to a specific interpretation of The National Road Traffic Act 93 of 1996, the National Road Traffic Regulations, 2000, the Southern African Development Community Road Traffic Signs Manual

(SADC RTSM) and the South African Road Traffic Signs Manual (SARTSM) no advertising shall be allowed within road reserves while only “road traffic signs” may be erected within such road reserves. Currently a large number of outdoor advertisements may be found within South Africa’s road reserves – both approved and not approved by controlling authorities.

The Draft Revised SAMOAC also makes provision for certain sign types within road reserves under certain conditions.

The manual also contains clear conditions applicable to tourism signs on national, provincial and municipal roads.

Appendix E: Benchmark study of global competitor destinations

CITY OF CAPE TOWN

TOURISM PLACE MARKETING BRANCH

DEPARTMENT OF ENTERPRISE AND INVESTMENT

REVISION OF TOURISM DEVELOPMENT FRAMEWORK AND STRATEGIC PLAN

2019-2024

Report 2: Benchmarking of Comparative Tourism Cities

September 2018

the journey

Tourism Consulting and Management

Introduction

The following benchmark overview of tourism destination management (DM) practices and organizational structures provides an indication of how other successful cities manage tourism in terms of:

- Institutional arrangements
- Destination management roles and responsibilities
- Tourism financing
- Strategic planning
- Marketing initiatives
- Events and MICE management

The information was gathered through interviews with senior managers, Internet searches and scrutiny of research reports and tourism plans.

The destinations evaluated are:

- Cape Town: The subject of this tourism study and South Africa's most successful international tourism city, having received a range of global tourism destination accolades and awards, among others CNN Travel's accolade as one of the world's most beautiful cities.
- EThekwini/Durban: the leading domestic tourism destination in South Africa and a seaside resort and port city.
- Barcelona (Spain): often cited in global best-practice benchmarking studies and the leading tourism city-destination in Spain, a country that is the world's third largest receiver of tourism with more than 70 million arrivals per annum. Recently been struggling with and addressing the threat of "over-tourism".
- Melbourne (Australia): occupies much of the coastline of Port Phillip Bay and spreads into the hinterlands towards the Dandenong and Macedon ranges, Mornington Peninsula and Yarra Valley. It rates highly in entertainment, tourism and sport, as well as education, health care, research and development and the Economist Intelligence Unit consistently ranks it the world's most liveable city
- Vancouver (Canada): A coastal seaport city in western Canada with greater Vancouver being the third-largest metropolitan area in Canada. Consistently named as one of the top five worldwide cities for liveability and quality of life and the Economist Intelligence Unit acknowledged it as the first city ranked among the top-ten of the world's most well-living cities for five consecutive years. Major focus on sustainability and its status as a "green" city.

Key Findings

Overview of tourism in the cities (Table 1)

The analysis presents the status quo of the various bodies surveyed.

While a lot can be learned from destination management practices in all five cities surveyed, the scope and scale of tourism differs substantially among them. The comparison with leading world city destinations clearly indicates that tourism in both South African cities (Cape Town and Durban) is very much in the early tourism developmental stages of the destination life cycle.

Whereas both South African cities host between 2 million and 2.5 million overnight visitors per year, the three international cities all host between 10 million and 12 million overnight visitors per annum. While Cape Town has a longer stay period than the other cities, visitor nights recorded in Cape are half of those recorded in Barcelona, a third of those recorded in Vancouver and a fifth of those recorded in Melbourne.

While Cape Town's revenue from tourism is much higher than that of Durban it is between three and five times less than those of the benchmarked international cities.

Tellingly, the ratio of visitors per citizen in the international cities is only 0.54 visitors per local inhabitant in Cape, while it is 7.3 visitors/local inhabitant in Barcelona, 2.4 in Melbourne and 3.6 in Vancouver.

As a result, tourism revenue per capita for Cape Town citizens is only around R3,600 (and R1,350 for Durban), while this ratio is R24,800 for Barcelona, R33,600 for Melbourne and R18,600 for Vancouver. Even when taking into account Purchasing Parity ratios between Cape Town and the international cities it is clear that tourism is on average two to five times more beneficial, to their economies compared to the situation in Cape Town.

Institutional arrangements and roles (Tables 2, 3 and 4)

Institutional arrangements vary among the cities and while the survey reflects the current state of tourism management arrangements, structures and budgets in the benchmarked cities have substantially evolved over the past two decades and will probably continue to change in the years to come.

Cape Town

Tourism functions are split between the Municipality taking on tourism development internally while visitor services and some marketing functions are undertaken by Cape Town Tourism, an external non-profit, membership-based organisation.

Although Cape Town Tourism is primarily a visitor services organisation it also conducts some marketing activities and specializes in digital promotion. While the Municipality is CTT's primary funder, the organisation generates a substantial income on a commercial basis. The Board of Directors of Cape Town Tourism is mainly comprised of and chaired by private sector members of the association, with the Municipality having an oversight seat on the Board.

The Municipality handles tourism policy, planning and development internally. This includes both product packaging and community development projects. The tourism organizational structure in the Municipality has recently changed from a fully- fledged tourism department in a Directorate of Tourism, Events and Marketing, to a tourism unit in a multi-functional Department of Enterprise & Investment directly under the office of the Mayor.

Events promotion receives special attention and is the mandate of a separate Events Department in Mayor's office.

The Municipality has a partnership agreement with Wesgro, the provincial investment and tourism agency to conduct international leisure marketing and fulfil the Convention Bureau role on behalf of both the City and Province. Wesgro is also the leading body for tourism market research and statistics, although Cape Town Tourism and the municipal tourism unit conduct research on an ad hoc basis.

At local (sub-Metro) level the Municipality has appointed eight Area Tourism Officers to consult and engage with local communities and tourism groupings regarding tourism matters. These do not report to the tourism unit. There are no sub-metro tourism organisations and visitor services are organized according to demand patterns, with VICs established at major tourism congregation points such as the city centre (x2), V&A Waterfront, Kirstenbosch, the international airport, Simon's Town, Canal Walk shopping centre and Table Mountain cableway.

The balance of mandates and powers between the Municipality, Cape Town Tourism and the provincial tourism agencies has changed substantially over the past decade, with Cape Town Tourism moving almost full circle from a visitor services organisation to a marketing agency for the city and back again to largely fulfilling the visitor services role.

eThekwini

All tourism functions at Metro level including destination marketing, development and visitor services have been consolidated in the Municipality under a Department of Business Support, Tourism and Markets. The Municipality conducts its visitor services and marketing functions under the brand "Durban Tourism". The Department also conducts some basic visitor research.

The Municipality operates seven tourism information centres under the "Durban Tourism" brand, located at key visitor congregation points including Amanzimtoti, North Beach, uShaka Marine World, King Shaka Airport, etc.

The Municipality supports a "bottom-up", community based tourism model and contributes financially to eight Community Tourism Organisations (CTOs) that are voluntary, membership-driven organisations distributed broadly in accordance with municipal districts and coordinated under the umbrella of Durban Community Tourism Organisation (http://durbancto.co.za/). Each of the CTOs has a constitution and six of the eight have their own brands and websites.

The Municipality has formed a partnership with the provincial government to establish the Durban Kwazulu Natal Convention Bureau as a unit of the provincial tourism agency Tourism Kwazulu Natal (TKZN), for MICE marketing of the city and province. TKZN is also the leading market research and statistics body for both city and province.

Barcelona

Tourism is mainly the domain of Barcelona Tourism, a statutory organisation (special purpose vehicle) formed by a consortium of stakeholders including the City Council, Chamber of Commerce and Industry and the private marketing foundation. Barcelona Tourism is a highly commercialized entity that fulfils the leisure and MICE tourism marketing, product packaging, events promotion and visitor reception roles for the city. The organisation generates most of its funding on a commercial basis through reservations, ticketing and tours and in addition it receives limited grants from the City Council and the provincial government of Barcelona provinces.

The City Council has retained the functions of economic policy and strategic planning as well as visitor infrastructure and attractions development. Both the City Council and Barcelona conduct market research and the City Council publishes comprehensive annual tourism statistics.

Melbourne

Tourism management in Greater Melbourne is mainly the domain of the City of Melbourne (municipality) and the provincial tourism agency Visit Victoria. In addition, the tourism private sector in the city have formed a voluntary membership-based organisation called Destination Melbourne that has largely taken on the mandate of business advocacy, coordination and empowerment, although it produces a visitor's guide and conducts a local level tourism awareness campaign. Destination Melbourne generates 90% of its income through commercial activities and sponsorships and receives only small grants from public sector partners.

City of Melbourne's tourism department operates according to a clearly formulated tourism action plan. The municipality's strategy concentrates of ensuring an excellent visitor experience (including visitor information, urban design and visitor infrastructure, visitor welcoming, city dressing and product improvement) through an integrated approach that harnesses the programmes and capacities of a variety of departments and functions in the Municipality. The City conducts some marketing and PR, mainly in the regional and domestic market and operates a VIC.

There is no city-level tourism marketing agency; all promotional activities for Melbourne, as the leading tourism destination in Victoria, has been consolidated under the auspices of Visit Victoria, the state-level tourism agency for Victoria. Visit Victoria is in charge of leisure/consumer marketing, visitor services, events promotion and MICE promotion through their events unit and Melbourne Convention Bureau, a division of Visit Victoria.

Vancouver

The Vancouver Municipality has entirely "outsourced" its tourism function to Tourism Vancouver, a private-sector driven, membership-based tourism organisation. Tourism Vancouver's funding is derived largely from a city-level bed tax of 3% of accommodation costs, which it has the mandate to collect. Interestingly, Tourism Vancouver is compelled to use around 26% of bed-tax revenue to repay the mortgage registered to build the Vancouver Convention Centre.

Although the City has no dedicated tourism function it seems that authorities have realized the need to focus on tourism as a major revenue earner for the city and as such the City, Tourism Vancouver and the Vancouver Economic Commission (trade and industry body) have recently joined forces to formulate the Vancouver Tourism Master Plan. The various City departments have important roles to play in implementing the plan, of which implementation will be coordinated and monitored through a Vancouver Tourism Partnership (VTP) comprising the key parties mentioned above.

Financial and staff capacity (Table 5)

Funding

Funding for tourism destination marketing, development and visitor services ranges widely among the benchmarked cities.

Both Cape Town and eThekwini allocated in excess of R100 million annually to tourism and events development and promotion in 2017.

In Barcelona, the external agency Barcelona Tourism operates on a budget of more than R900 million (equivalent) per annum, although most of this is self-generated and tourism grants received were around R80 million.

Melbourne City spends around R470 million per annum on tourism, while the provincial agency that acts on behalf of the city and province, Visit Victoria, operates on a budget of more than R1 billion compared to Wesgro's tourism budget of around R40 million.

Tourism Vancouver has a budget of around R217 million per annum and the provincial tourism agency Destination British Columbia has a budget of almost R600 million per annum.

From a revenue perspective, the South African city tourism agencies are largely dependent on municipal grants.

Overall, in cities where external tourism agencies exist (Cape Town, Barcelona, Vancouver) the majority of municipal tourism allocations flow to such agencies, with the internal municipal departments operating on smaller budgets that cover salaries and some operational expenses.

During 2107 Cape Town Tourism generated R9.4 million (17.4%) of its R54 million annual revenues through visitor reservation services (6.2 million) and membership fees (R3.2 million). Durban Tourism, a municipal department generated only 1% of its total revenues of R114.2 million mainly through a public tourism bus service. Barcelona Tourism has adopted a highly commercialized approach and self-generated approximately R840 million (91%) of its total 2016 revenues of R920 million, mainly through reservations, tours and sales of merchandise and materials. The rest of its income came from municipal and provincial grants. Interestingly, Tourism Vancouver derived around 90% of its revenues from a legislated city room tax. In Australia the local and provincial governments have clearly acknowledged the enormous potential of tourism and almost all funding in Victoria and Melbourne comes in the form of grants.

Staffing

Staff capacity is related to revenue and economies of scale, but also depends on the mandates and key performance areas of the various organisations. Budget-to-staff ratios vary substantially.

Local tourism agencies dealing primarily with visitor services employ relatively large numbers of operational personnel in their various tourism information centres and for providing personal services to visitors. Total budget-to-staff ratio varies between R700,000/staff member (CTT) and R2.7 million/staff member (Vancouver), while tourism marketing organisations have higher budget/staff member ratios e.g. Visit Victoria (more than R11 million per staff member); Destination British Columbia (around R6 million/staff member) and Barcelona Tourism (R5.5 million per staff member – due to also operating visitor services. It is expected that the visitor services employment intensity should decrease as visitors increasingly rely on technology for information and reservations.

Where the cities have entrusted tourism execution to external agencies (Cape Town, Barcelona and Vancouver) the cities internally have very limited staff complements. Melbourne follows a balanced model, with an internal staff complement of around 40, while marketing and events execution have been outsourced to Visit Victoria.

Strategies and programmes (Table 6)

It is interesting to note that none of the South African tourism cities have current, comprehensive and long-term tourism plans. The planning tourism planning statuses in the cities surveyed are as follows:

Cape Town

- The City of Cape Town Tourism Development Framework (2013-2017) has come to the end of its lifespan and the City is in process of updating it. The revised TDF will serve as strategic framework for tourism development for the period 2019-2023.

- The City tourism division has a limited staff component and is structured in two sections that act largely as facilitating agencies, namely A) Place Marketing facilitation and b) Strategic Tourism Infrastructure Development facilitation.
- Cape Town Tourism operates according to an annual business plan and is responsible for Visitor Services and some domestic and digital marketing initiatives.
- Area-based tourism offices in each of the four regions do not report to the City's tourism division, but to the Directorate responsible for area-based service delivery. Each of the area tourism offices produces a tourism development plan for their areas, which identify specific (mostly concrete) project interventions.
- The City adopted a formal Events Policy in 2013 and has a separate, internal events section with a substantial budget to encourage the development of major events in the city.
- In Wesgro's 5-year Strategic Plan, tourism promotion is one of 7 sub-programmes since Wesgro deals with trade, investment and tourism promotion. The tourism programme is fairly narrow and consists of 4 strategic goals namely destination image promotion, market research towards niche market development, promotion of business tourism and promotion of events. Wesgro has also taken on the Air Access promotion programme.

eThekwini

- The Municipality does not have a comprehensive tourism strategic plan. Tourism development in the city is broadly addressed in the KZN provincial tourism Master Plan towards 2030.
- Durban Tourism (under the Municipality) has formulated a marketing strategy "Taking Durban to the World" 2013-2020.
- The various community tourism organisations generally do not have strategic plans and conduct visitor services on a day-to-day basis.
- The Municipality does not have an Events Policy but is working on one

Barcelona

- Barcelona City Council has adopted the Barcelona Tourism Strategic Plan 2020 and the Council and Barcelona Tourism both take responsibility for implementing this plan. Barcelona 2020 tourism strategy is holistic in nature and was jointly developed and adopted by the City Council and Barcelona Tourism. It sets a long-term, cohesive strategic path for tourism development and promotion.
- The Barcelona Strategic Tourism Plan 2020 clearly divides the various functions, with the City Council dealing mainly with tourism development, infrastructure provision and investment facilitation and Barcelona Tourism dealing with the promotional functions (destination marketing, product packaging, MICE promotion, visitor services and visitor research) – all directed by the Barcelona Tourism Strategic Plan 2020.

Melbourne

- City of Melbourne has formulated a practical, visitor oriented four-year Strategic Tourism Action Plan (206-2019) with a strong visitor focus and with strategies and actions based on the stages of the visitor journey namely Planning and Booking, Travel to the Destination, On Arrival, In Destination and Departure. There are 24 strategies and around 40 actions in the plan.
- Visit Victoria conducts its business in accordance with the Victorian Visitor Economy Strategy (2016-2025). The Strategy sets a goal of increasing visitor spending to $36.5 billion by 2025 and identifies nine priorities to achieve this ambitious goal, namely More private sector investment; Build on the potential of regional and rural Victoria; Improved branding and marketing; Maximising the benefits of events; Improved experiences for visitors from Asia; Better tourism infrastructure; Improved access into and around Victoria; Skilled and capable sector and More effective coordination.

Vancouver

- Until recently there existed no comprehensive tourism development plan for Vancouver and tourism promotion and development was largely left to Tourism Vancouver, which is geared as a promotional organisation with a focus on leisure and MICE marketing, events support, visitors services and industry coordination. Tourism Vancouver operates according to a five-year corporate strategic framework.
- However, the City of Vancouver, Tourism Vancouver and the Vancouver Economic Commission recently joined forces to develop the Vancouver Tourism Master Plan, a comprehensive tourism development framework with a holistic tourism development approach. The Master Plan makes specific recommendations in eight areas namely Product Development Events, Visitor Experience Design, Neighbourhoods, Tourism Infrastructure, Transportation, Advocacy and Public Affairs and Partnerships and Alliances.
- While Destination British Columbia, the provincial tourism agency does not act as an agent for the City of Vancouver, Vancouver is a key asset in the province and an important focus in Destination BC's strategy. Destination BC is a strategically managed organisation that finds its direction and mandate from "Gaining the Edge", the tourism destination strategy for British Columbia and operates in accordance with a 5-year Corporate Strategy.

Key lessons from benchmarking studies

While in-depth studies of the various tourism strategies reveal specific proposals that are of particular relevance in the context of the cities studied, the following high-level, common features of globally successful cities are evident:

- *They accommodate and manage large numbers of visitors in a strategic manner:* The ratios of visitors: citizens show that cities are capable of hosting very large numbers of visitors, if managed in a planned and strategic manner. Cape Town's visitor-citizen ratio is still very low when compared to the benchmarked destinations.
- *The domestic market remains the cornerstone of tourism success in key destinations:* Domestic visitors comprise the majority of arrivals in both Melbourne (77%) and Vancouver (58%). While international visitors comprise 70% of arrivals in Barcelona, the city still receives in excess of 3.4 million domestic visitors per annum. Cape Town's share of the South African domestic tourism market remains low and the city receives fewer than 700,000 domestic visitors per annum.
- *Their level of tourism investment and capacity acknowledges the economic force and importance of tourism:* These cities all have significant tourism expenditure budgets of between R220 million and R900 million per annum and collective tourism budgets of city and their provincial tourism partners are between R600 million and R1.2 billion. Tourism budgets of Cape Town and the Western Cape tourism authorities are wholly insufficient when compared to the budgets of the benchmarked cities.
- *Tourism is managed through a "Whole of Government" approach*: The tourism strategies of leading tourism cities are increasingly veering towards an integrated, shared vision for tourism, where the tourism strategy directs the programs, actions and budgets of a wide range of city departments including transport, safety and security, social services, urban design and expansion, etc. As such, the tourism functions within municipalities have coordination and facilitation as core mandates and their implementation tasks are largely outsourced to dedicated tourism promotion agencies. The status and positioning of the tourism unit in the City of Cape Town is currently unclear and the unit's power and mandate seems inadequate to coordinate and guide the strategies of a range of partners.
- *Tourism is acknowledged and treated as specialised area of work and requiring specialised staffing and implementation agencies.* The lead cities have "outsourced" tourism implementation to powerful and well-funded tourism agencies, whether these functions are city or provincial level. Barcelona Tourism and Tourism Vancouver are holistic tourism development and marketing agencies that fulfil all tourism implementation functions for these cities, while Visit Victoria. A dedicated tourism agency has taken on tourism promotion on behalf of the Melbourne City and the province of Victoria. In Cape Town, the City's tourism unit has very limited resources, Cape Town Tourism has a narrow mandate and tourism is one of several functions of Wesgro, the provincial trade, investment and tourism agency, with a very small tourism budget compared to leading world tourism regions.

- *There is synergy and coordination at geographical levels:* The coordination and synergy of functions between Visit Victoria and the City of Melbourne provides a good example of a destination where the key city (in this case Melbourne) is at the core of the tourism offering; but where the tourism sector has also realised that the surrounding regions in the State provide exceptional complementarity to the city experience. As such, it would be unwise to separate the city and rest of the province in devising and executing the tourism promotion strategy. Visit Victoria thus fulfils all tourism promotion functions for Melbourne City and the rest of the state (province) under a service level agreement, with Visit Victoria being funded and staffed in accordance with this mandate.
- *They realise that local citizens are part and parcel of the tourism destination experience:* The strategies of successful tourism cities place a high premium on consulting locals when developing tourism, promoting local travel among residents, creating awareness of tourism as an industry among locals and spreading tourism to local areas. Neighbourhood-level tourism development plans are also increasingly important. While the City of Cape Town has devolved tourism to area level, implementation of local level tourism plans has lagged and tourism demand remains heavily skewed towards traditional tourism areas.
- *They value a strategic, visionary and sustainable tourism development approach:* The leading cities all operate in accordance with dynamic, visionary tourism development strategies and they consistently monitor progress with implementation. City of Cape Town's updated TDF will provide such a framework; however, the TDF lacks a spatial (geographical) dimension for expanding tourism in a prioritised manner. There exists no comprehensive destination development strategy at provincial level.
- *Research and measurement key:* Leading cities spend substantial time and resources on research towards understanding the needs and preferences of their current and potential visitors and generating valid and reliable statistics towards measuring progress and success with implementing their tourism plans.

Tabulated findings

Table 1: Overview of tourism in the cities

2016	Population ('000)	Estimated tourist overnight arrivals[5] ('000)			Visitor nights ('000)	Tourist Expend. (R'000)[6]	Annual Citizens per Visitor	Key Challenges	Tourism positioning
		Total	Domestic	International					
Cape Town	4,005	2,170	670 (44.2%)	1,502 **(55.8%)**	16,950	R14.5 bn	1.85	• Scarce resources (water) • Seasonality • Pressure at key visitor points • Visitor safety • Domestic price inflation • Service levels in peak season	Mainly superb environment and lifestyle incl. outdoor active, wine, art, design, shopping
eThekwini	3,702	2,380	1,940 **(81.5%)**	440 (18.5%)	11,600	R5 bn	1.56	• International brand image • Air access • Product diversification • Dependence on domestic market	Mainly beach and family entertainment
Barcelona City	1,609	11,790	3,430 (29.1%)	8,360 **(70.9%)**	34,740	R40 bn	0.14	• "Overtourism" impacting on residents and visitor experience • Visitor safety	Mainly superb urban lifestyle incl. cuisine, art, (Gaudi) architecture, shopping
Melbourne								• Visitor impact management • Transport provision • Air access	Mainly urban living, art and lifestyle mecca "World's most live-able city"
Greater Melbourne	5,000	11,992	9,251 **(77%)**	2,741 (23%)	80,289	R168 bn	0.42		
Inner City	136	5,500	4,400 73%	1500 (27%)		R83 bn	0.03		
Vancouver								• Expensive air access • High land values curb growth in accommodation • Seasonality	A premium urban travel destination – sustainable, "green" city
Greater Metro	2,899	10,346	6,071 **(58%)**	4,175 (42%)	48,426	R54 bn	0.28		
Inner City	631								

[5] South African city estimates based on SAT domestic and international tourism statistics and research of local tourism bodies; Barcelona figures extracted from City Council research website
[6] Broad estimates derived from published provincial statistics and other sources

Table 2: Institutional Models

Overall model	Institutions dealing with tourism	Legal status
Cape Town		
Functions split between Municipality and external organisations/special purpose vehicles at city and provincial level	1. City of Cape Town: Place Marketing unit and district offices in Department Enterprise & Investment, Directorate of the Mayor. Previously Department Tourism in Directorate Tourism, Events and Marketing	Tourism unit in Metro Municipality
	2. Cape Town Tourism	Non-profit Company under Companies Act of 2008
	3. City of Cape Town Events Department	Tourism department in Municipality
	4. Wesgro International marketing and Investment promotion	Statutory body of Western Cape Provincial Government
eThekwini		
Main destination management functions internal within Municipality, supported by non-profit Community-based tourism organisations MICE in a separate KZN Convention Bureau funded jointly by province and city	1. eThekwini Municipality: Business Support, Tourism and Markets Department includes both tourism development and marketing (Durban Tourism)	Tourism section in Municipality
	2. Durban KwaZulu-Natal Convention Bureau	Division of Tourism KZN a statutory body (Partnership between KZN province and eThekwini Municipality)
	3. Community Tourism Organisations (CTOs)	Various non-profit organisations (associations, Non-profit companies)
Barcelona		
Functions split between Municipality and external organisations/special purpose vehicles	1) Barcelona City Council Department of Enterprise and Tourism	Department in Barcelona City Council
	2) Barcelona Tourism	Statutory organisation of the Province (B.O.P.) of Barcelona Founded in 1993 by the Barcelona City Council, the Chamber of Commerce, Industry and Navigation of Barcelona and the Foundation for the Promotion of Barcelona.
Melbourne		
Tourism promotion, events and MICE collapsed in	1. City of Melbourne	Tourism section in Municipality under Directorate City Economy

Overall model	Institutions dealing with tourism	Legal status
provincial tourism agency, Tourism Victoria Main destination management functions internal within Municipality, supported by independent private sector driven organisation Destination Melbourne		and Activation Group, including: Manager Events Melbourne Manager Business and Tourism Manager International and Civic Services Manager City Marketing and Corporate Affairs
	2. Destination Melbourne	Greater Melbourne independent, membership-based, non-profit tourism organisation
	3. Visit Victoria	Victoria State statutory tourism agency responsible for tourism promotion of both Melbourne city and the surrounding state regions and incorporating consumer marketing, events and Melbourne Convention Bureau
Vancouver		
The municipality does not have a tourism department or unit – tourism is mainly in the hands of a marketing organisation Tourism Vancouver in partnership with the provincial agency. The City, Tourism Vancouver and Vancouver Economic Commission has recently formulated a tourism Master Plan with a holistic destination management approach	1. Tourism Vancouver	Non-profit, membership-based organisation under Society Act of British Columbia
	2. Destination British Columbia	BC State statutory tourism agency responsible for tourism promotion of the province of British Columbia

Table 3: Local tourism organisation and visitor services

City	Sub-Metro Level Tourism Arrangements
Cape Town	*District Tourism officers:* City of Cape Town tourism department assigns a district/sub-metro tourism officer in their structure CTT operates *7 Visitor Information Centres*
eThekwini	*Metro and CTAs:* Durban Tourism at Metro level, acknowledges and supports Community Tourism Organisations (CTOs) at sub-metro level. 7 Visitor Information Centres and some *CTO Information Centres*
Barcelona Tourism	*No sub-Metro organisations*: All tourism organisation at metro city level. Barcelona Tourism operates *8 Visitor Information Centres* and a number of Visitor Information *Kiosks* at key tourist points
Melbourne	*No dedicated sub-metro tourism councils.* The inner Melbourne municipal councils work together to strengthen the liveability, attraction and prosperity of the region, including tourism development. Network of 5 VICs in the city and another 4 in greater Melbourne area under auspices of Visit Victoria, and Visit Victoria also conducts marketing and events promotion for the greater Melbourne area
Vancouver	*No sub-metro offices but Regional and community tourism organisations*. British Columbia is divided into 5 regions, with Vancouver, Coast and Mountains being one of these. In this region Vancouver city if one of 27 local areas – albeit by far the largest tourism earner. Each local area has a VIC and they are all affiliated to Destination British Columbia. In summary, BC has: – 19 Sector marketing organizations (e.g. skiing, wine touring, mountain biking); – 5 regional DMOs (RDMOs); and – 100+ municipally operated or community-level DMOs (CDMOs)

Table 4: Roles and responsibilities

	Tourism Policy, Planning & Regulations	Visitor Services	Destination Marketing	Destination Development	Events Support/ Promotion	MICE Promotion	Research & Knowledge	Tourism Enterprise and Skills Development	Tourism Infra-structure Development
Cape Town									
1. City of Cape Town: Tourism unit in Dept. Enterprise & Development	✓			✓				✓	✓
2. Cape Town Tourism		✓	✓						
3. City of Cape Town Events Department					✓				
4. City partnership with province through Wesgro			✓			✓	✓		
EThekwini									
1. EThekwini Municipality (incl. Durban Tourism) in Dept. Economic Development, Tourism and Markets	✓	✓	✓	✓	✓		✓	✓	✓▯▯+ others
2. Durban KwaZulu-Natal Convention Bureau						✓	✓		
3. Community Tourism Organisations (CTOs)		✓							
Barcelona									
1. City of Barcelona: Department Enterprise & Tourism	▯			▯			▯		▯
2. Barcelona Tourism		✓	▯	▯	▯	▯	▯	✓	
Melbourne									
City of Melbourne	▯	▯	▯	▯				▯	▯
Visit Victoria		▯	▯		▯	▯	▯		

	Tourism Policy, Planning & Regulations	Visitor Services	Destination Marketing	Destination Development	Events Support/ Promotion	MICE Promotion	Research & Knowledge	Tourism Enterprise and Skills Development	Tourism Infra-structure Development
Destination Melbourne			✓				✓	✓	
Vancouver									
City of Vancouver	✓			✓	✓				✓
Tourism Vancouver	✓	✓	✓		✓	✓	✓		
Destination British Columbia		✓	✓	✓	✓	✓	✓	✓	

Table 5: Financial and staff capacity

City and entities	Approximate Tourism Budget 2017 (R'000)				Personnel (No.)			
	Total	Grants	Member Fees	Own Income	Total	Management	Operational	Admin
Cape Town								
1. City of Cape Town: Place Marketing unit and district offices in Directorate of Mayor	4 000 (Ex salaries)	4 000		-	6	2	3	1
2. Cape Town Tourism	54 000	44 600	3200	6200	90	8	70	12
3. City of Cape Town Events Department	40 000	40 000		-	16	2	8	6
4. Wesgro	Total 84 621 Tourism ±40 000	81 825 40 000	-	2 769 -	89 of which approx. 15 dedicated to tourism			
5. City contribution to provincial Wesgro (for tourism, trade, investment)	10 000	10 000						
eThekwini								
1. eThekwini Metro Municipality; Both tourism development unit and marketing **(**Durban Tourism) in Department Economic Development, Tourism and Markets	114 211	113 053	-	1 158	80	8	68	4
2. Durban KwaZulu Natal Convention Bureau City contribution from budget above	16 106 2 744	16 106 2 744	-	-	3	1	2	-
3. Community Tourism Organisations (CTOs)	Varies	Annual contribution by eThekwini Municipality and some membership fees			Most are not staffed, some have one staff member			
Barcelona								
1. Barcelona City Council: Department Enterprise & Tourism	?							
2. Barcelona Tourism	920 000	80 000	-	840 000	169	17	145	7

City and entities	Approximate Tourism Budget 2017 (R'000)				Personnel (No.)			
	Total	Grants	Member Fees	Own Income	Total	Management	Operational	Admin
	(€63400)	(€5500)		(€57900)				
Melbourne								
1. City of Melbourne	470 000 A$45 000	?	-	-	+- 40	4	?	?
2. Visit Victoria (provincial)	1 120 000 A$106 000	1 050 000 A$99 162	-	70 000 A$6 943	97	7	?	?
Vancouver								
1. Tourism Vancouver	217 000 C$19 401	Room tax 188 000 C$16 786	10 000 C$924	18 000 C$1,691	±80	7	?	?
2. Destination British Columbia (provincial)	596 000 C$53 152	588 000 C$52, 417	-	8 000 C$705	100	?	?	?

Table 6: Strategies and programmes

City and Entities	Strategic Plan	Key Programmes
Cape Town		
1. City of Cape Town: Place Marketing unit and district offices in Directorate of Mayor	Tourism Development Framework, City of Cape Town, 2013-2017	1. Destination Development including: a) Tourism community engagement (stakeholder consultation, entrepreneurship and awareness programmes) b) Tourism product development (community level engagement, planning and experience development c) Tourism sector support (training, mentorship, etc.) d) Special projects 2. Destination Market Facilitation including: a) SLA management with Cape Town Tourism b) Tourism research for City c) Implementation of Seasonality Strategy d) Strategic Planning and stakeholder collaboration e) Road signage facilitation f) Universal access promotion
2. Cape Town Tourism	CTT annual business plan	1. Visitor Services a) VIC operations b) Visitor reservations c) Production of Visitors Guide and other marketing materials and apps 2. Marketing a) Major focus on web and social media marketing b) City Break campaign

City and Entities	Strategic Plan	Key Programmes
		c) Halal campaign d) Media hosting programme
3. City of Cape Town Events Department	City of Cape Town Events Policy, 2013	1. Financial and in-kind support for major events being staged in City
4. Wesgro on behalf of City and Province	Wesgro 5-year Strategic Plan, 2015-2020 – tourism is one of 7 sub-programmes	1. Destination identity (brand) development 2. Leisure marketing through supportive linkages with niche industries 3. MICE marketing (Convention Bureau) on behalf of City and Province 4. Events support at provincial level 5. Air Access Support project
EThekwini		
1. EThekwini Metro Municipality; Development and marketing	Taking Durban to the world: Durban Tourism Visitor Marketing Strategy 2013-2020	1. Tourism development unit a) Route Development (e.g. Inanda Heritage Route) b) Tourism enterprise development (incl. tour guide training, tourism craft market, tourism community awareness programme) 2. Tourism promotion (Durban Tourism) a) Marketing (attending tourism fairs, brand ambassador programme, media partnerships) b) Air route development c) Events support (R23.5m direct support) d) Call to action campaign
2. Durban Kwazulu Natal Convention Bureau	KZN Tourism Strategic Plan	1. Promoting KZN and Durban as an international MICE destination on behalf or Province and City

City and Entities	Strategic Plan	Key Programmes
3. Community Tourism Organisations (CTOs)	Largely support the Durban Tourism strategy	1. Visitor and Membership Services for Durban and 7 districts in greater Metro area
Barcelona		
1. Barcelona City Council Department of Enterprise and Tourism	Barcelona Tourism Strategy 2020	1. Governance and coordination: stakeholder liaison, other departments, Barcelona Tourism 2. Knowledge management: tourism observatory, research programme 3. Destination Barcelona (falls under Barcelona Tourism - see below) 4. Mobility programme – improved tourist mobility and transport integration 5. Accommodation – advancement of liberalised business environment and incentives 6. Taxation and funding – optimising taxation 7. Managing Spaces: sustainability, planning 8. Visitor communication and reception – under Barcelona Tourism Visitor Services 9. Regulation and Planning: urban planning and regulation enforcement 10. Economic development – integration with LED
2. Barcelona Tourism	Barcelona Tourism Strategy 2020	1. Leisure Marketing and promotion a) Segment focused marketing drive b) Joint promotion with hinterland/province c) Brand improvement d) Online promotion drive e) International fairs and workshops f) PR and media hosting & networking 2. Product packaging: “Barcelona is Much More” (diversification), sustainable tourism, food & wine, Pyrenees, sea/coast, shopping, premium/luxury tourism, weddings, etc.

City and Entities	Strategic Plan	Key Programmes
		3. MICE marketing and bidding support: promotion as a MICE hub 4. Visitor services, including VICs, publications, apps, and ticketing services 5. Research
Melbourne		
1. City of Melbourne	City of Melbourne Tourism Action Plan 2016-2019	1. City tourism policy and strategy 2. City tourism development 3. Business and skills empowerment 4. Visitor services 5. Regional marketing
2. Visit Victoria on behalf of city and State	Victorian Visitor Economy Strategy (2015-2025)	1. Domestic and international leisure marketing 2. MICE/Convention Bureau 3. Events 4. Visitor Information Centres 5. State-wide tourism empowerment
Vancouver		
1. City of Vancouver	Vancouver Tourism Master Plan (to be implemented) Recommendations in Master Plan require a "whole of government" approach by the City. Currently no tourism department but City was	1. Product Development 2. Events 3. Visitor Experience Design 4. Neighbourhoods 5. Tourism Infrastructure Development 6. Transportation 7. Advocacy & Public Affairs

City and Entities	Strategic Plan	Key Programmes
	partner in formulation of Master Plan.	8. Partnerships & Alliances
2. Tourism Vancouver	Vancouver Tourism Master Plan (to be implemented) Five-year strategic framework	1. Brand development and management 2. Events support and promotion 3. MICE promotion (serves as Convention Bureau) 4. Visitor services and one VIC 5. Industry collaboration and partnerships
3. Destination British Columbia	Gaining the Edge: BC Government's Tourism Strategy Destination BC Corporate strategy	1. Destination branding 2. Destination marketing (province and local areas) 3. Visitor research 4. Destination development (mainly packaging and visitor services)

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