

2.8 TOURISM

The status quo of Tshwane tourism comprises of a variety of components, including tourism products, marketing, infrastructure, human resources, SMME and Entrepreneurial development and investment development plans.

Tourism Supply

The City has several unique aspects. The points of orientation include the natural topographical landmarks in the ridges that run through the CTMM area from east to west, as well as the man-made landmarks such as the Union Buildings. The gateways include natural gateways such as the Fountains valley and the Wonderboom Poorts and man-made gateways such as the N4 entrance from the east at the 'koeksister' crossing of Pretorius and Schoeman streets. The significant districts or domains include the Inner City and the various areas between the ridges – north of the Magaliesberg, between Magaliesberg and Daspoortrant, between Daspoortrant and Kwaggasrant and south of Kwaggasrant.

A number of tourism product elements are present in Tshwane – some of which are currently offered to tourists as products, and others of which are merely elements that could potentially be developed into tourism products in the future. Table 2.6 provides an indication of the various tourism product elements and in which geographic area of the City they can be found. From Table 2.7 it is clear that the natural and the Cultural & Heritage tourism product elements are very strong in the majority of the City. There are also certain areas that have a particular focus – such as the strong struggle history elements in Mamelodi, and the Jazz (which forms part of the Arts) in Atteridgeville.

Table 2.6: Tourism Product Elements

Area	Govern-ment and the Capital City	Archi-tecture	Nature	Wildlife	Education	MICE	The Arts	Struggle History	Anglo-Boer History	Early History	Voortrekker and Boer History	Culture & Heritage	Sport	Shopping and Enter-tainment
Pretoria CBD & surrounds	XXX	XXX	XX	X	XXX	XX	XXX	XX	XXX	X	XX	XXX	XXX	XX
Atteridgeville			X				XXX	XX				XXX	X	
Centurion	X		XXX	XX	X	XX	XX		XX	XX		XX	XXX	XXX
Eersterust			XX									X		
Ga-Rankuwa					XX							X		
Hammanskraal			XX	X				X				XX		
Laudium												XXX		
Mabopane													XX	XX
Marabastad		X	XX		XX		X	XXX				XX		XX
Mamelodi			XX				XX	XXX				XX	XXX	
Akasia			XXX		X		X					X		
Eastern region		X	XX			XXX			X					XXX
Western Region		X	XX								XXX			
Soshanguve		X	XXX				XX			XX		XX		XX
Temba														XXX
Winterveld												XXX		XXX
Crocodile River			XXX				XX							XXX

X = present, but not significant, XX = relatively significant, though not very strong, XXX = very significant



Table 2.7 provides a similar analysis of adjacent areas, and both nature and culture & heritage are very strong in the areas adjacent to Tshwane.

Table 2.7: Tourism Product Elements of Areas Adjacent to Tshwane														
Area	Govern- ment and the Capital City	Archi- tecture	Nature	Wildlife	Education	MICE	The Arts	Struggle History	Anglo- Boer History	Early History	Voortrekker and Boer History	Culture & Heritage	Sport	Shopping and Enter- tainment
Dinokeng			XX	XXX		XX								
Roodeplaat			XX			XXX							X	
Dam area														
Cullinan		X					XXX		XX			XXX		XX
Hartebeespoort			XXX				XX					X	X	
Dam														
Pienaarsrivier			XX	XXX										
Cradle of Humankind			XX							XXX		XX		
Magaliesberg			XX			XXX	XX					X		XX

X = present, but not significant, XX = relatively significant, though not very strong, XXX = very significant

In addition to the various tourism product element categories, there are supporting tourism elements, including accommodation establishments and restaurants, as well as events, adventure, medical facilities and industrial hubs that attract visitors to the CTMM area. Table 2.8 provides an indication of the number of accommodation establishments in the area.

	Total	% Graded	Estimated # of Rooms	Estimated # of Beds	Quality
Bed and Breakfast	153	18%	776	1 539	66%
Backpackers	3	100%	32	66	67%
Guest Houses	168	22%	1 532	2 955	43%
Hotels	68	46%	5 784	11 475	61%
Self-catering	20	20%	296	607	52%
Lodges	23	9%	611	1 314	36%
Total	435	24%	9 030	17 956	54%

Source: Grant Thornton

Based on average number of employees per establishment it was estimated that 6 200 people are employed in the accommodation sector of the industry in Tshwane, and that the tourism industry in total directly employs approximately 7 200 people.

Tourism Demand

Table 2.9 provides an overview of the demand profile for CTMM.



Table 2.9: Summary of Demand (Totals as reflected per survey)		
	Foreign	Domestic
Origin	50 countries represented from all regions Largest proportion of respondents from Europe	Gauteng North West Mpumalanga KwaZulu-Natal
Purpose of Visit	Holiday (61%)	Holiday (45%) and Shopping (21%)
Monthly Income	R10 000 – R40 000 (53%)	R0 – R10 000 (76%)
Age Groups	25 - 44 years (64%)	18 – 24 years (81%)
Frequency	48,6% visit the City once or more a year	
Length of stay (overnight)	4,6 nights	3,6 nights
Length of stay (day visitors)	5,1 hours	4,8 hours
Attractions Visited	Union Buildings (51%), Shopping Centres (47%), Voortrekker Monument (40%), Church Square (36%)	
Total Number of Respondents	351	649
Number of Overnight Visitors	181 (52%)	126 (19%)
Number of Day Visitors	170 (48%)	523 (81%)
Average spend per trip (Day Visitors)	R1 200	R628
Average spend per trip (Overnight Visitors)	R2 785	R1 393
CTMM Tourism Survey, 2005		

Table 2.10 provides the total number of overnight and day visitors to the City of Tshwane, including a comparison to the total number of overnight visitors to South Africa and Gauteng.

Table 2.10: City of Tshwane Market Share (Total Market)			
	Foreign	Domestic	Total
Number of overnight visitors to Tshwane	277 000	1 140 000	1 417 000
Number of Day Visitors to Tshwane	275 000	3 300 000	3 575 000
Total Tourist Market to Tshwane	552 000	4 440 000	4 992 000
Overnight Visitors to Gauteng	3,42 million	8,64 million	12,06 million
Total Tshwane Market as % of Gauteng overnight visitors	16,1%	51,4%	41,4%
Overnight Visitors to South Africa	6,7 million	49,3 million	56 million
Tshwane Market as % of South African overnight visitors	8,2%	9,0%	8,9%

Source: SA Tourism, Grant Thornton

Tourism Infrastructure

The levels of basic infrastructure in Tshwane is relatively good, with only a few areas of concern. There are areas in the east and Centurion where the electricity capacity is limited, which will have an impact on future development in the area. The road network is generally well developed, as is the rail network – though under utilised because of the location of stations – and there are 5 airports. Public transport is available, though not currently tourist-friendly. Road signage is problematic – with inconsistent or non-existent signage to tourism attractions.

The emergency services provision is up to standard, with the City Disaster Management Plan in place, which is important for hosting major events in the City.

Training and Entrepreneurial Development

There are a variety of training providers available in Tshwane, including both tertiary and secondary education and training providers. The available training are broadly provided in three categories, i.e. hospitality (which includes catering, accommodation, etc.), travel (mainly focused on travel agencies) and tour guiding. There are also a number of national training programmes available that can be tapped into, such as the Responsible Tourism Training provided by the South African Tourism Institute.

Notable in Tshwane is the University of Pretoria's Tourism Management Department – the first university in South Africa to provide a degree in tourism management.

Tourism Development Objectives and Priority Initiatives

Primary Objectives

Strategic Objectives:

- Ensure sustainability;
- Greater awareness and understand of tourism's contribution to environmental protection, economic growth and social redress;
- Promote equity in development;
- Improve the quality of life of host communities;



- Provide high quality experiences to visitors; and
- Maintain the quality of environmental resources on which tourism is based.

Detail:

- Emphasise the City's capital city status;
- Strengthen the intellectual/ educational image of the City;
- Portray the City of Tshwane as a leisure/ leisurely city - both for domestic and foreign visitors;
- Grow all categories of tourists to the area (Detailed growth targets are available);
- Increase the number of tourism operators that comply with the BEE Scorecard;
- Increase the length of stay of visitors to the area;
- Increase the average spend per visitor to the area;
- Establish the City of Tshwane as a differentiated / unique tourist destination for all potential markets;
- Encourage visitors to stay in traditional low-season periods to reduce seasonality;
- Convert day visitors to overnight visitors;
- Encourage tourists to visit a wider range of tourism facilities and attractions;
- Change perceptions about the City associated with the Apartheid regime to the City associated with freedom;
- Exploit the City's capital city status for tourism purposes;
- Market the products to identified target markets;
- Complement and cooperate with tourism marketing and development initiatives at national, provincial, and regional levels;
- Stimulate and facilitate investment into the tourism industry;
- Maximise the economic impact of benefits flowing from tourism and minimise leakages;
- Create employment - increase the number of job opportunities in tourism;
- Promote empowerment and transformation in the industry;
- Facilitate human resource development;
- Integrate previously disadvantaged communities into the tourism industry;
- Encourage a sense of pride in the tourism assets of Tshwane;
- Ensure that all stakeholders in the area (government and private sector, white and black) work together for the overall good of the area;
- Increase the number of cultural heritage sites in the City;
- Increase the percentage of land under protection;
- Protect the natural tourism assets of the study area;
- Ensure the sustainable use of all tourism resources; and
- Leverage natural resources for the benefit of tourism.

Priority Initiatives

New Tourism Planning Framework

Focussed at a strategic level, the planning framework provides a context for aligning the Tshwane Tourism with national, provincial and municipal policies. This is aimed at ensuring that proposals around developing tourism products, infrastructure and tourism marketing are in line with existing planning and strategies including the objectives and priorities of CTMM. At the municipal level, direction is drawn from higher level planning including the CDS, MSDF and TIDP. A number of implications are evident in this regard.

Firstly, in terms of the spatial focus of publicly lead investment and development, there is significant emphasis on the north of Tshwane as well as the Inner City. Associated with these areas, a number of opportunities with regard to tourism product development and marketing (such as enhancing Tshwane's capital city status and developing on its historical and cultural assets) are noted.

Secondly, in terms of informing implementation and future project identification, the TIDP related mechanisms are used to guide this process.

In addition to these strategies, which provide a framework, a number of major development initiatives was also identified with specific relevance to tourism development in Tshwane. These include Freedom Park (a major new tourism opportunity); Dinokeng and the Cradle of Humankind (major provincially driven natural/heritage tourism initiatives just outside Tshwane); Gautrain (with the potential to provide major strategic new tourism gateways to Tshwane); Tshwane International Convention Centre; Fort West (a planned mixed use precinct with a historical/heritage focus); the Mandela Development Corridor (a catalytic area to support planned inner city revitalisation) and Rainbow Junction (new international soccer stadium in the north of Tshwane).

New Market Development Plan

Based on an analysis done for the CTMM tourism master plan the following markets have been identified as priorities: In priority they are:

1. Domestic day and overnight leisure market;
2. Domestic day and overnight VFR market;
3. Foreign overnight leisure market;
4. Foreign overnight VFR market;
5. Domestic overnight MICE market;
6. Domestic overnight educational youth groups;
7. Foreign overnight MICE market;
8. Foreign day leisure market; and



9. Others: General Leisure experience, Sport, Education, Arts, Visiting Friends & Relatives, Nature & Scenery (Jacarandas), Anglo-Boer War, Science & Technology, Struggle History, Conferences and Events.

New Marketing Strategy/Plan

The CTMM marketing strategy focuses on the regional or generic marketing of the City of Tshwane as a tourist destination, as the product owners themselves are responsible for the specific marketing of their products. As part of the marketing strategy, the integrated promotion and communications strategy focuses on programs and marketing tools to brand the city and promote the key products.

The initiative addresses the following:

- Focus areas for the City related to the National Skills Development Strategy
- Identified skills gaps and shortages in the tourism industry in the City;
- Strategies to address the skills gaps and shortages;
- SMME and Entrepreneurial development; and
- Tourism Awareness.