

Theewaterskloof Local Municipality

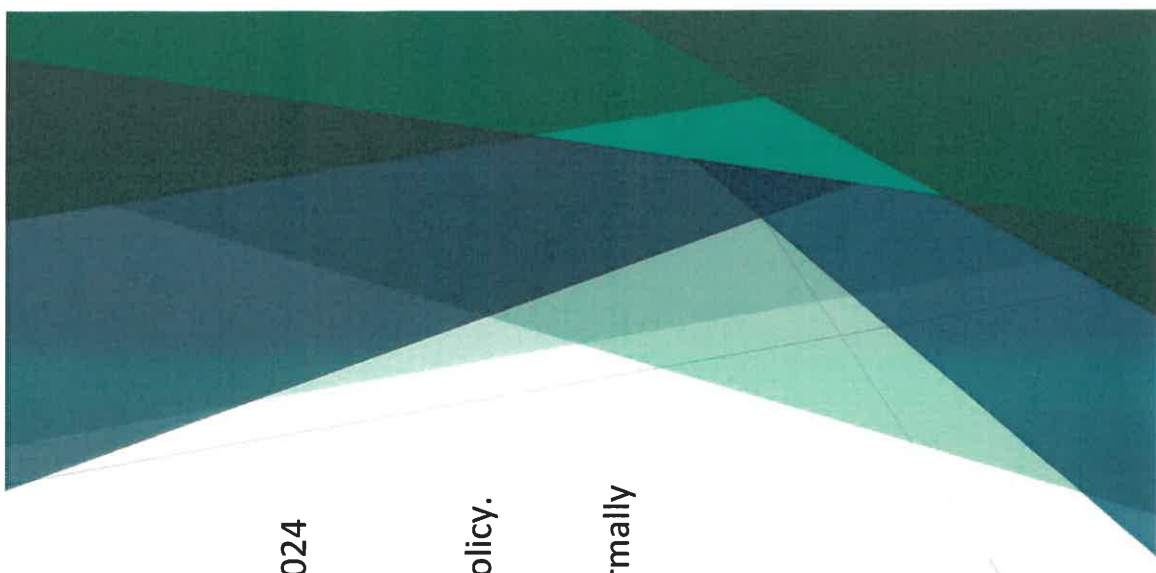
Revision of the Tourism Strategy for Theewaterskloof Municipality

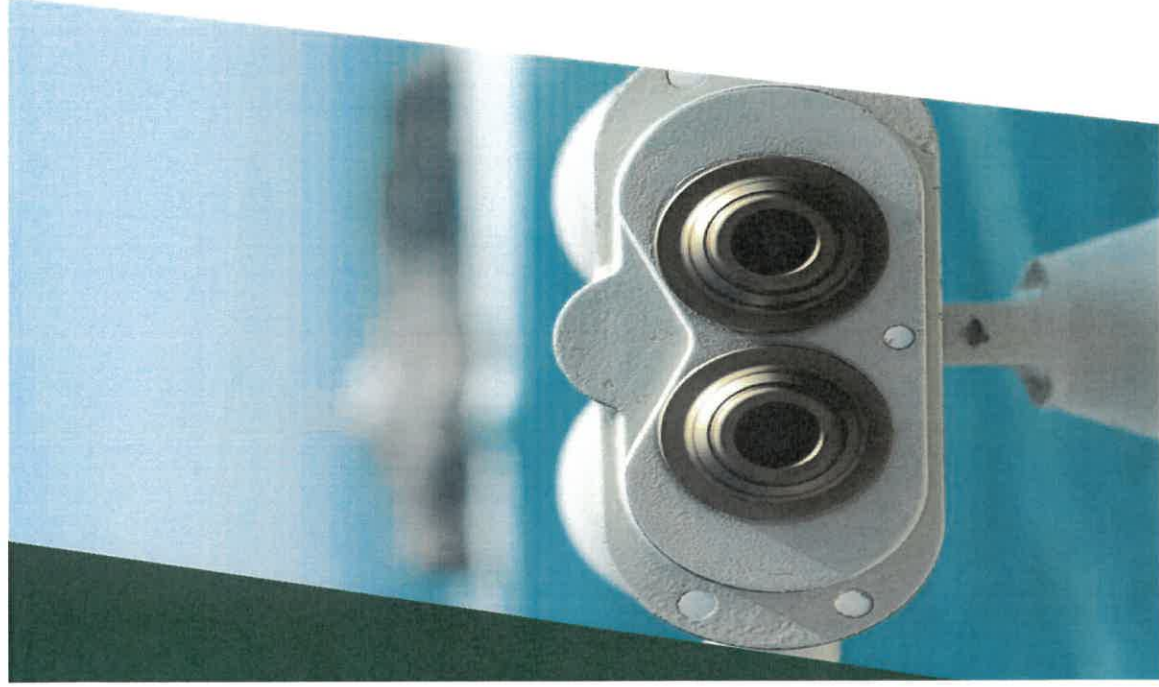
Council Workshop



Background

- Theewaterskloof Municipality advertised Bid TWK2 BF 01/2023/24 during the 2023/2024 financial year
- The procurement process, including advertisement, evaluation, adjudication and appointment, was undertaken in accordance with the Municipality's approved SCM Policy.
- Urban-Econ Development Economists (Pty) Ltd was appointed on 9 April 2024 and formally commenced the project on 15 April 2024 following the inception meeting.

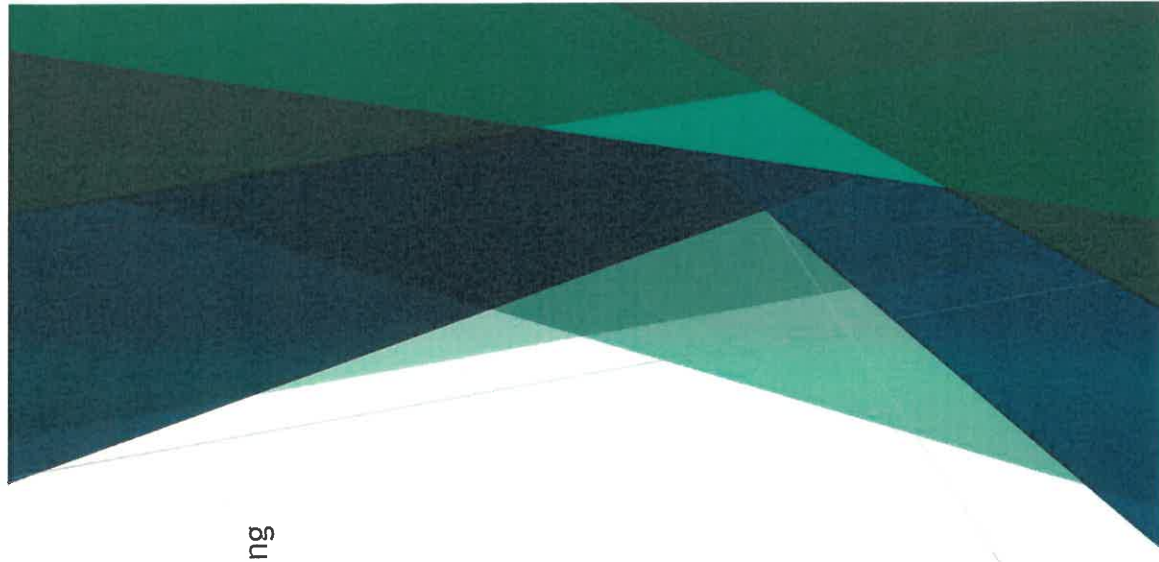




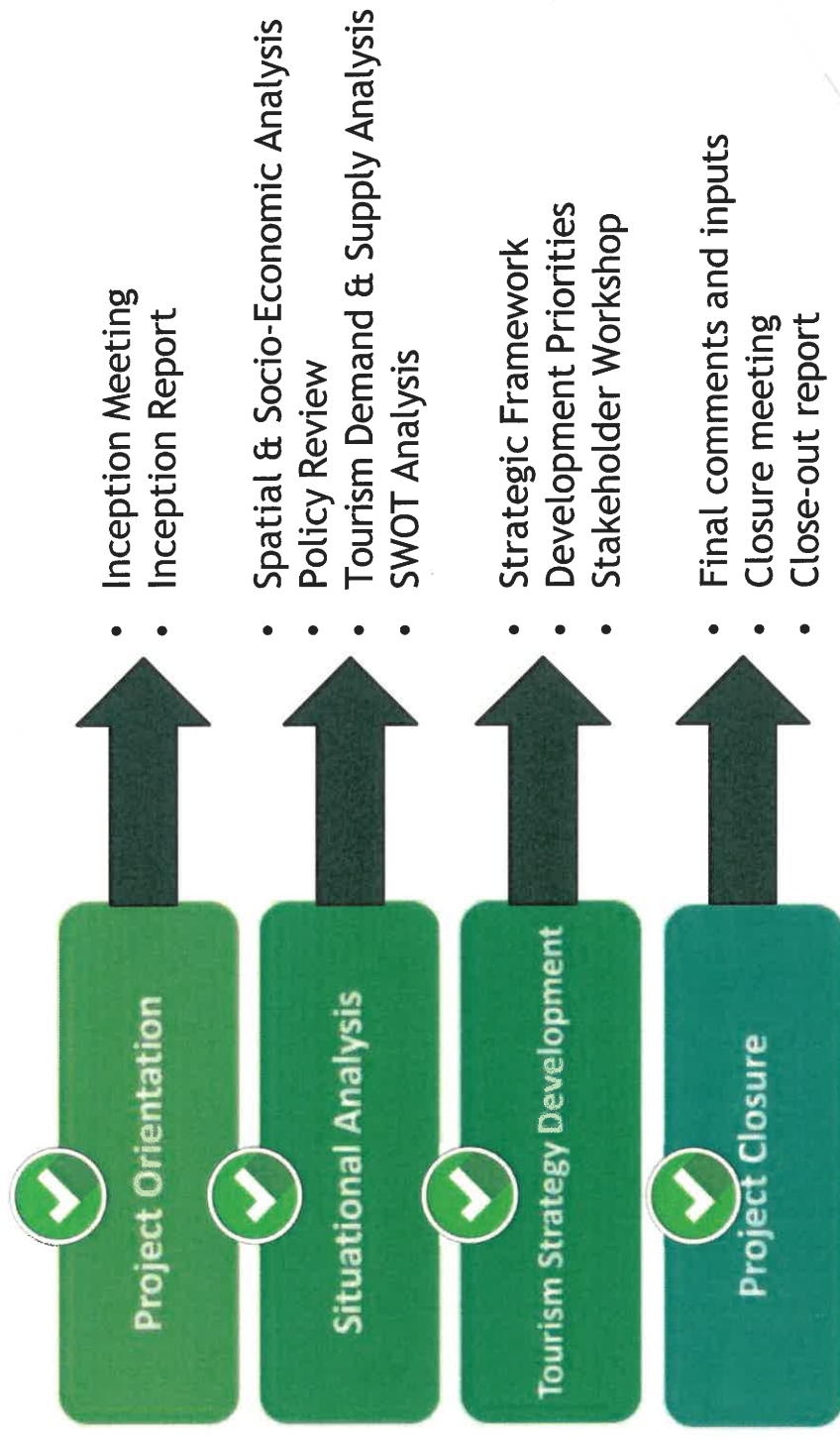
Project Scope

The development of a Tourism Strategy for Theewaterskloof Municipality through the following steps

- Project Inception
- Situation Analysis
- Strategic Framework
- Implementation Plan
- Final draft Tourism Strategy report presentation to the council

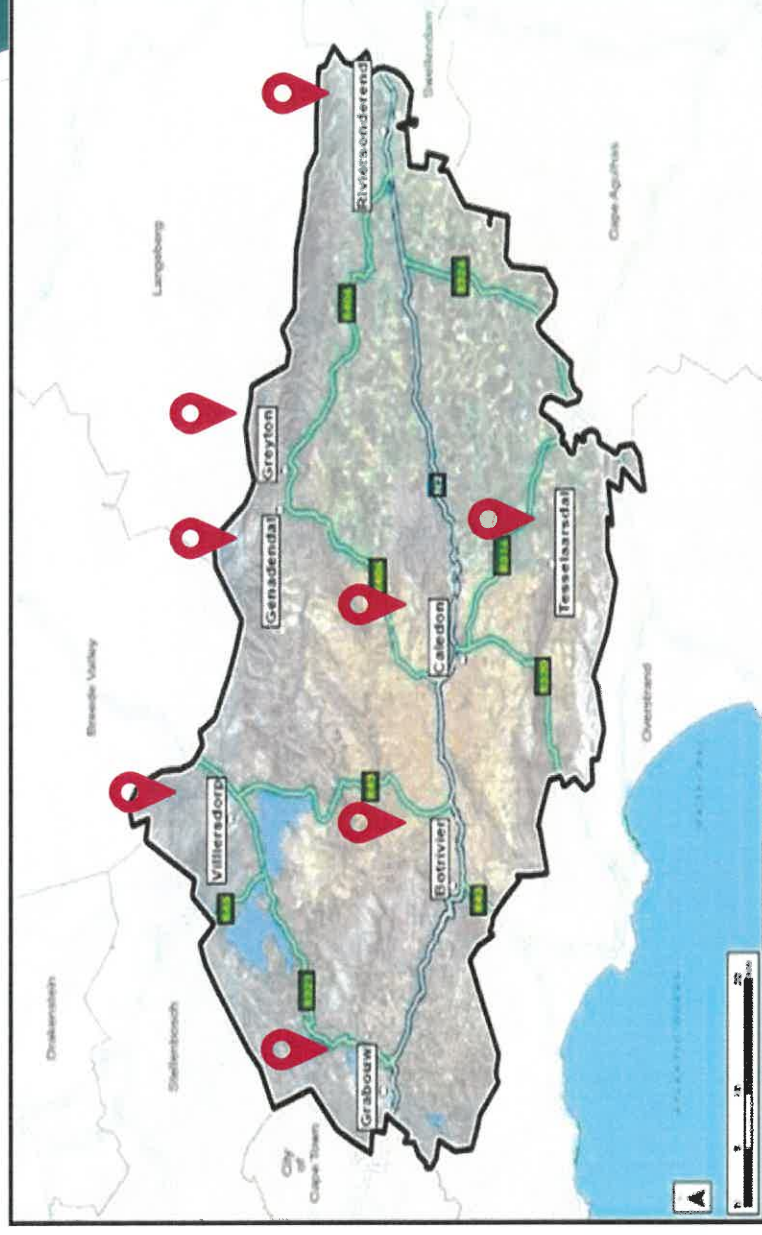


Methodology



Study Area

- Villiersdorp
- Genadendal
- Greyton
- Riviersonderend
- Tesselaarsdal
- Caledon
- Botriver
- Grabouw



Stakeholder Engagements

Focused Group Discussions: (*Online*)

- Enabling Environment
- Destination Planning
- Tourism Experience Enhancement
- Destination Marketing & Coordination

Online Survey:

- A survey was circulated to stakeholders that couldn't attend the group discussions

Individual Interviews: (*Online*)

- Individual interviews were conducted with selected individuals in the sector



Engagement		Type	Period	Participants
Introductory Meeting with Key Stakeholders		Online Engagement Session	9 May 2024	14
Stakeholder Engagement Session 1 (Virtual) Area: Grabouw, Elgin, Villiersdorp		Online Engagement Session	16 May 2024	12
Stakeholder Engagement Session 2 (Virtual) Area: Caledon, Tesselaarsdal, Botrivier		Online Engagement Session	17 May 2024	10
Stakeholder Engagement Session 3 (Virtual) Area: Grayton, Genadendal Riviersonderend		Online Engagement Session	23 May 2024	5
Stakeholder Feedback Session (Virtual)		Online Engagement Session	18 September 2024	9
Stakeholder Engagements		Physical	10 April 2025	-
Council Workshop/Presentation		Physical	10 April 2025	-

Draft Report



Tourism Strategy Draft October 2024



THEEWATERSKLOOF MUNICIPALITY TOURISM

Table of Contents

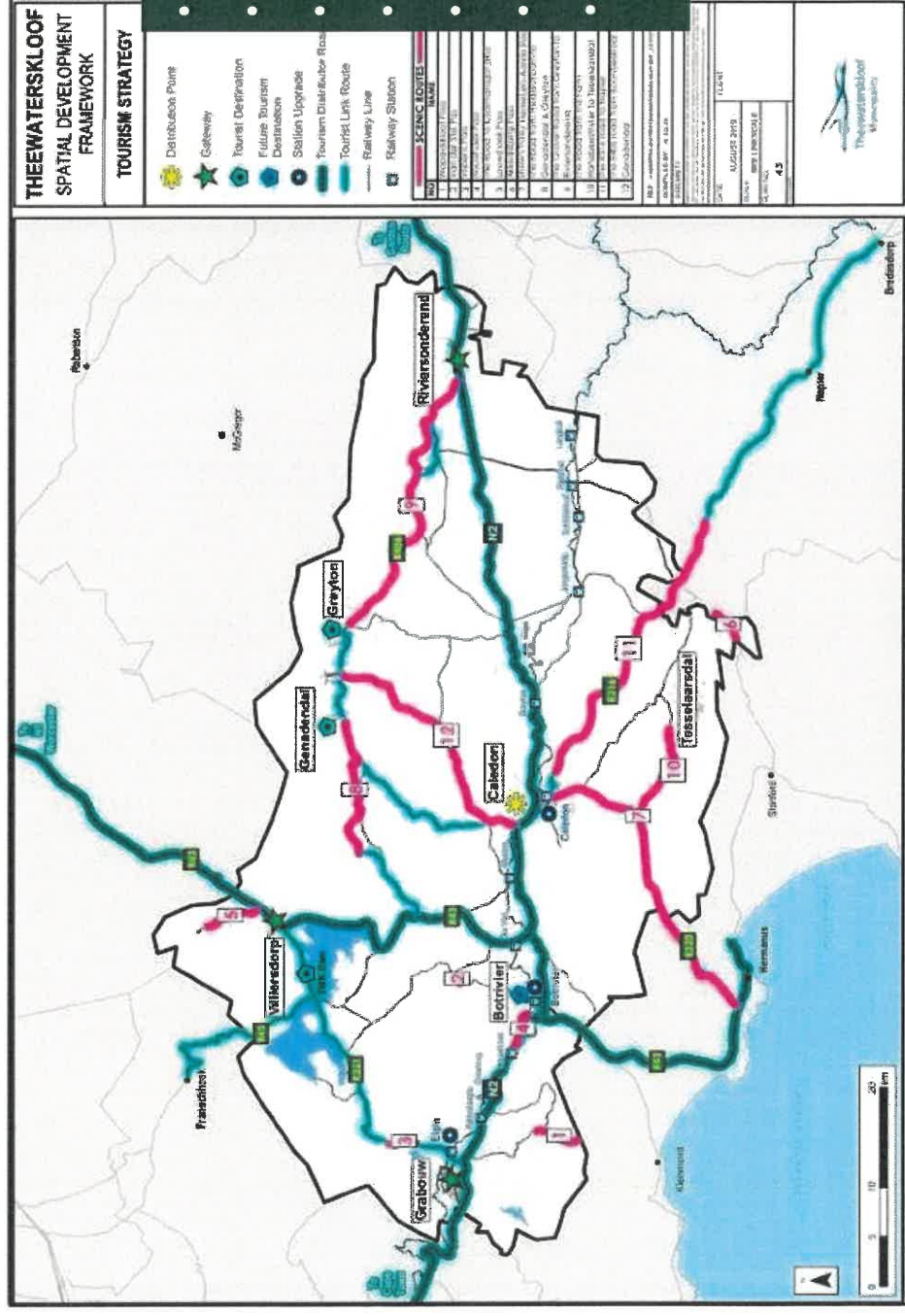
1. Introduction	1
1.1. Background	1
1.2. Scope of work	1
1.3. Methodology	2
1.4. Stakeholder Engagement	3
1.5. Report Structure	3
2. Environmental Scan	4
2.1. Spatial Overview	4
2.2. Transport and Movement Networks	13
2.3. Biodiversity and Natural Assets	15
2.3.1. Kogelberg Biosphere Reserve	15
2.3.2. Natural Environment	16
2.3.3. Vegetation Types	16
2.4. Socio-Economic Profile	18
3. Policy Overview	24
3.1. National Policy Review	24
3.2. Provincial Policy Review	26
3.3. Local Policy Review	27
4. Tourism Status Quo	31
4.1. Tourism Demand and Market Access	31
4.2. South African Tourism Performance Overview	31
4.3. Provincial Tourism Performance Overview	33
4.3.1. International Performance	34
4.4. Local Tourism Performance Overview	39
4.4.1. Overberg Visitor Trends and Patterns	39
4.4.2. Theewaterskloof Tourism Performance	42
4.5. Market Trends	44
4.6. Tourism Offering and Positioning	45
4.6.1. Key Attractions/Activities	46
4.6.2. Destination Positioning	50
4.7. SWOT Analysis	53
5. Strategic Framework and Direction	54



THEEWATERSKLOOF MUNICIPALITY TOURISM

5.1. Vision	56
5.2. Objectives	56
6. Tourism Development Pillars	58
6.1. Enabling Environment	60
6.2. Destination Planning	61
6.3. Tourism Experience Enhancement	62
6.4. Destination Marketing and Coordination	63
7. Institutional Environment	65
7.1. Institutional Structure	65
7.2. Municipality's Mandate	66
7.3. Main challenges	72
7.3.1. Key considerations	74
8. Implementation Priorities	79
8.1. Establishing a Tourism Working Group	80
8.2. Develop a comprehensive tourism database	81
8.3. Tourism Signage	83
8.4. Enhance community-based tourism	85
8.5. Leverage on agri-tourism opportunities	87
8.6. Brand recognition	89
9. General Remarks	92
Annexure A	93

Tourist Offerings



- Nature-based tourism
- Adventure tourism
- Sports tourism
- Cultural tourism
- Historical tourism
- Agri-tourism
- Wine tourism

Grabouw / Elgin Valley



Location



Grabouw / Elgin is a farming area in the Overberg area. The area is about 70km from Cape Town and on the N2 National Road. You will pass through Somerset West before heading over Sir Lowry's Pass which will take you over the mountains and straight to Grabouw.

Unique Offerings



- Wine farms with tastings
- Fresh chrysanthemums, roses and protea cultivation
- Restaurants serving local cuisine
- Cool Wine Festival
- Elgin Railway Market
- Mountain Biking
- Kogelberg Nature Reserve
- Hiking trails
- Farm stalls

History



- The history of the Grabouw / Elgin region is shaped by agriculture
- Grabouw is situated on Grietjiesgat farm
- The area was originally inhabited by Khoi-Khoi people
- The predominantly Coloured and Afrikaans-speaking population reflects its rich cultural heritage

Offers outdoor activities year-around

Popular wedding destination

Big apple export region

Botriver

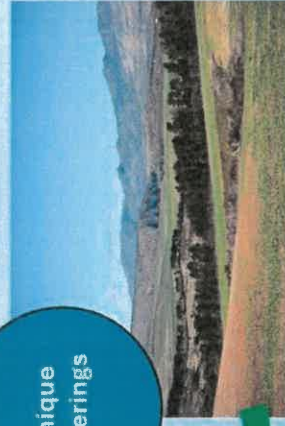


Location



Nestled at the foot of the Houw Hoek Pass, Botriver is the getaway to the Walker Bay wine-growing district via the N2 and Sir Lowry's Pass.

Unique Offerings



- Botriver Wine Route
- Fresh produce at farm stalls
- Horse riding
- Abundance of local arts and crafts available at brightly painted shops

History



- The area was first inhabited by prosperous Khoi-Khoi tribes
- The Botriver Hotel, built in 1890 is one of the oldest buildings
- A significant event in the town's history was the arrival of the railway line in 1902

The area is renowned for its vineyards and wineries

Tourism market linked to agri-tourism

The Botriver Hotel is the town's landmark



Caledon

Location



Caledon is a small town nestled against the Swartberg Mountains. Whichever way you arrive at this lively village, you'll be greeted by expansive barley and wheat fields stretching for kilometres in every direction

Unique Offerings



- Caledon hotel, casino, and spa
- Hot springs
- Ziplining tours
- Quad biking
- Anheuser Busch InBev is one of the world's only malt producers and the largest in the southern hemisphere

History



- The Khoi-Khoi discovered the iron-rich hot springs
- In 1710 Ferdinand Appel built a structure for visitors to enjoy these waters
- By 1893 the thermal springs were recognised globally for their exceptional mineral quality
- In 1813 the Dutch Reformed Church was consecrated

Big agricultural district

Annual renowned flower show

Grain production, stock farming and wool production district

Tesselaarsdal



Location



Tesselaarsdal is situated on the northern side of the Kleinriver Mountains, 20km south of Caledon

Unique Offerings



- A perfect breakaway from the city
- A place to experience natural beauty
- Hiking- and mountain biking trails
- Outdoor activities
- Country cuisine
- Wedding venues
- Potters and craftsmen distilleries

History



Tesselaarsdal is named after Johannes Tesselaar (1748-1810) a German immigrant's son who became a landowner

Small self-sustainable farms have emerged

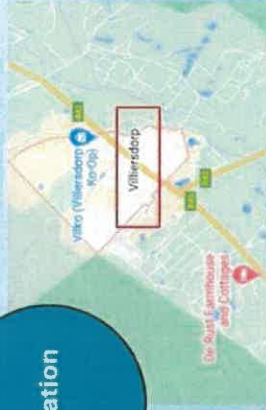
This village offers a rare off-the-map experience

Tesselaarsdal is part of the Cape Country Meander Route

Villiersdorp



Location



Villiersdorp lies between the N1 and the N2 on the R43 highway. This town is the ideal base from which to explore the Western Cape. It is less than two hours from Cape Town and only 25-minutes to Franschhoek.

Unique Offerings



- Tourism in this town is characterized by art, sports, and business visitors
- Art studios and galleries attract artists to this area
- Tractor Museum
- Farm stalls
- Alpaca farm
- Theewaters Sports Club
- Mountain biking trails
- 4x4 Routes

History



- First settled by French Huguenots in 1688
- Pieter de Villiers found the town in 1843
- Telegraph line established in 1883
- Villiersdorp is characterised by its strong community spirit and agricultural heritage
- Known for its welcoming oak-lined streets

Villiersdorp is classified as an agricultural service centre

The Theewaterskloof Dam is a major landmark in the town

Villiersdorp specialises in fruit farming and viticulture

Greyton/Genadendal



Location



Greyton/Genadendal is situated on the R406 between Caledon and Riversunderend. The most direct route from Cape Town to Greyton and Genadendal would be with the N2 through Somerset West and over Sir Lowry's Pass

Unique Offerings



- Greyton Nature Reserve
- Mountain biking trails
- Saturday Morning Market
- Historic village walk
- Hiking
- Bird watching
- Art Meander
- Horse riding
- Wellness and retreat spa's

History



- Established in 1854 and named after Sir George Grey
- The area's history includes the Hassequeas and Attaques Khoi-Khoi tribes who initially inhabited the region
- Agriculture historically included vegetables and fruits

It is both a lifestyle and tourism destination

Wide variety of coffee shops, restaurants, and art galleries

These towns offer an Old English Village atmosphere

Riviersonderend

Location



As the N2 highway acts as the main street, Riviersonderend's location in the Overberg region is hard to miss. Riviersonderend is 49,5km from Caledon

Unique Offerings



- Hiking routes
- Golf
- Bakeries offering home-baked goods
- 4x4 Trails
- Farm stalls
- Signal cannons
- Bird watching
- Buildings with architecture value

History



- The history dates to the VOC era, established to support farmers in the Western Cape
- Originally inhabited by Khoi farmers
- Smallpox outbreaks in 1713 reduced Khoi populations that opened land for European settlers
- The town was established in 1922

Home of South Africa's National Bird, the Blue Crane

Riviersonderend offers indigenous fynbos

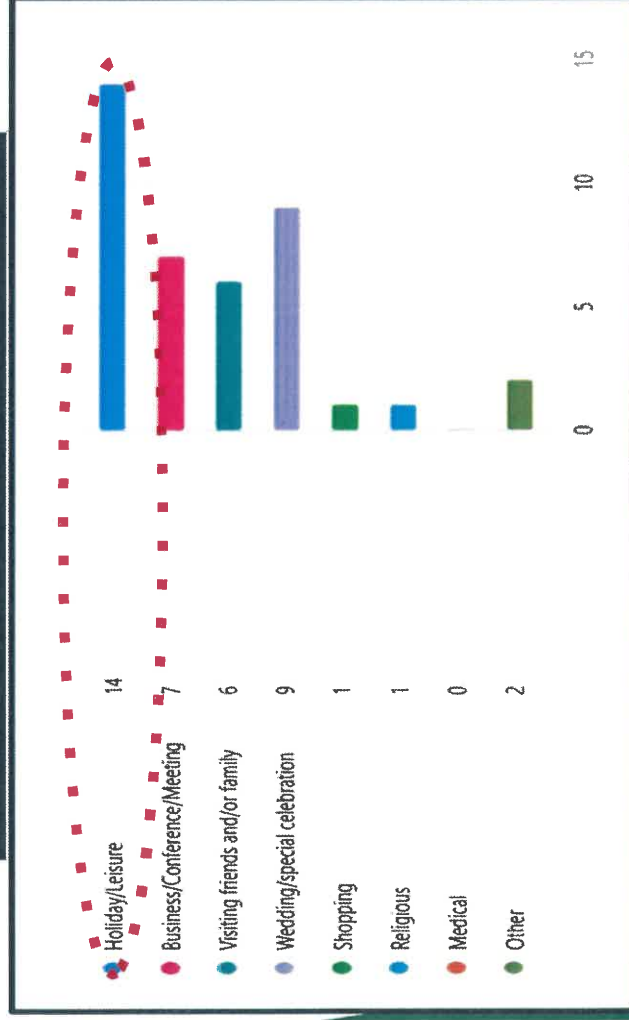
The town is surrounded by farmlands

Theewaterskloof Tourism Performance

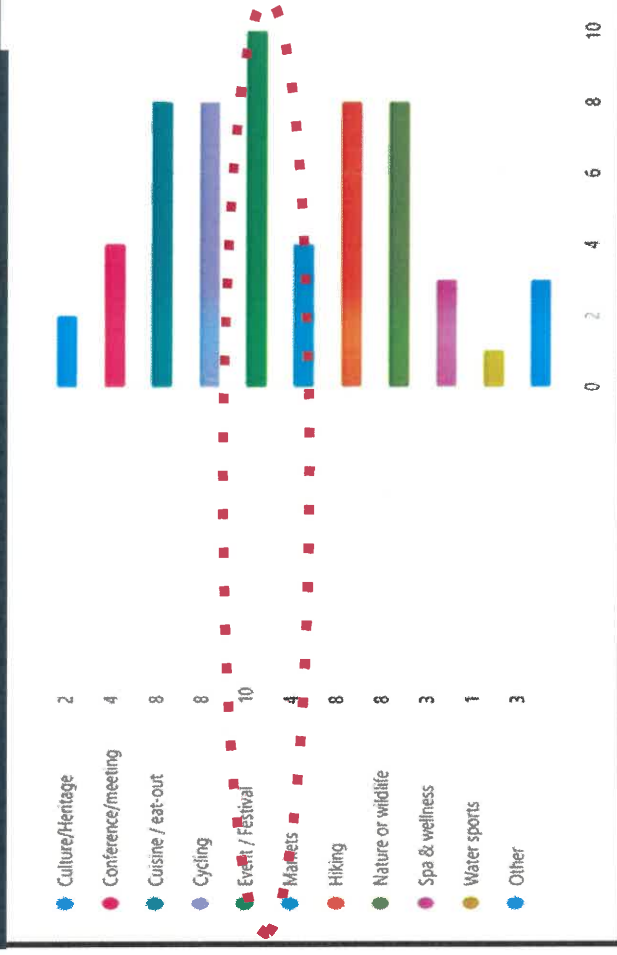


Why do people visit the TWK area?

Purpose of visit:



Activities undertaken by guests:



Nature Enthusiasts

The Kogelberg Biosphere Reserve's primary allure is its status as the heart of the Cape Floral Kingdom.

Wine Culture

Tourists interested in Theewaterskloof's wine culture can enjoy vineyard tours, tastings, and culinary experiences.

Mountain Biking and Hiking

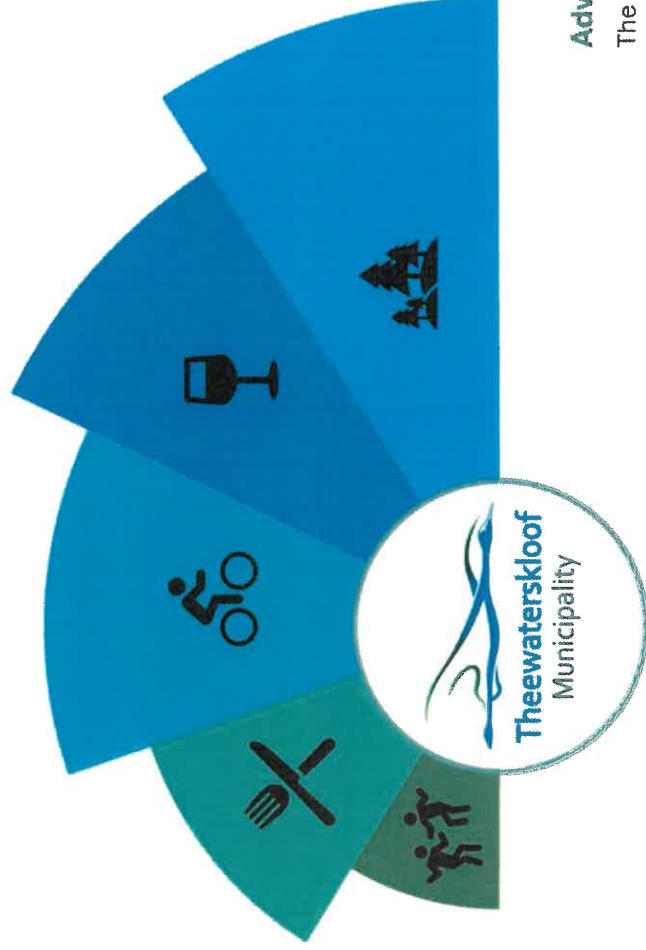
Mountain biking and hiking enthusiasts seek adventure and serenity in breathtaking landscapes. This area also hosts the popular Cape Epic Tour.

Food and Fresh Produce / Farmstalls

Tourists can enjoy the vibrant local cuisine and farm-to-table freshness with exquisite flavours at farmstalls that are situated along the N2.

Adventure Tourism

The region offers untamed wilderness where adventure is waiting to be discovered.



Market Trends

Competitive Advantages vs. Disadvantages

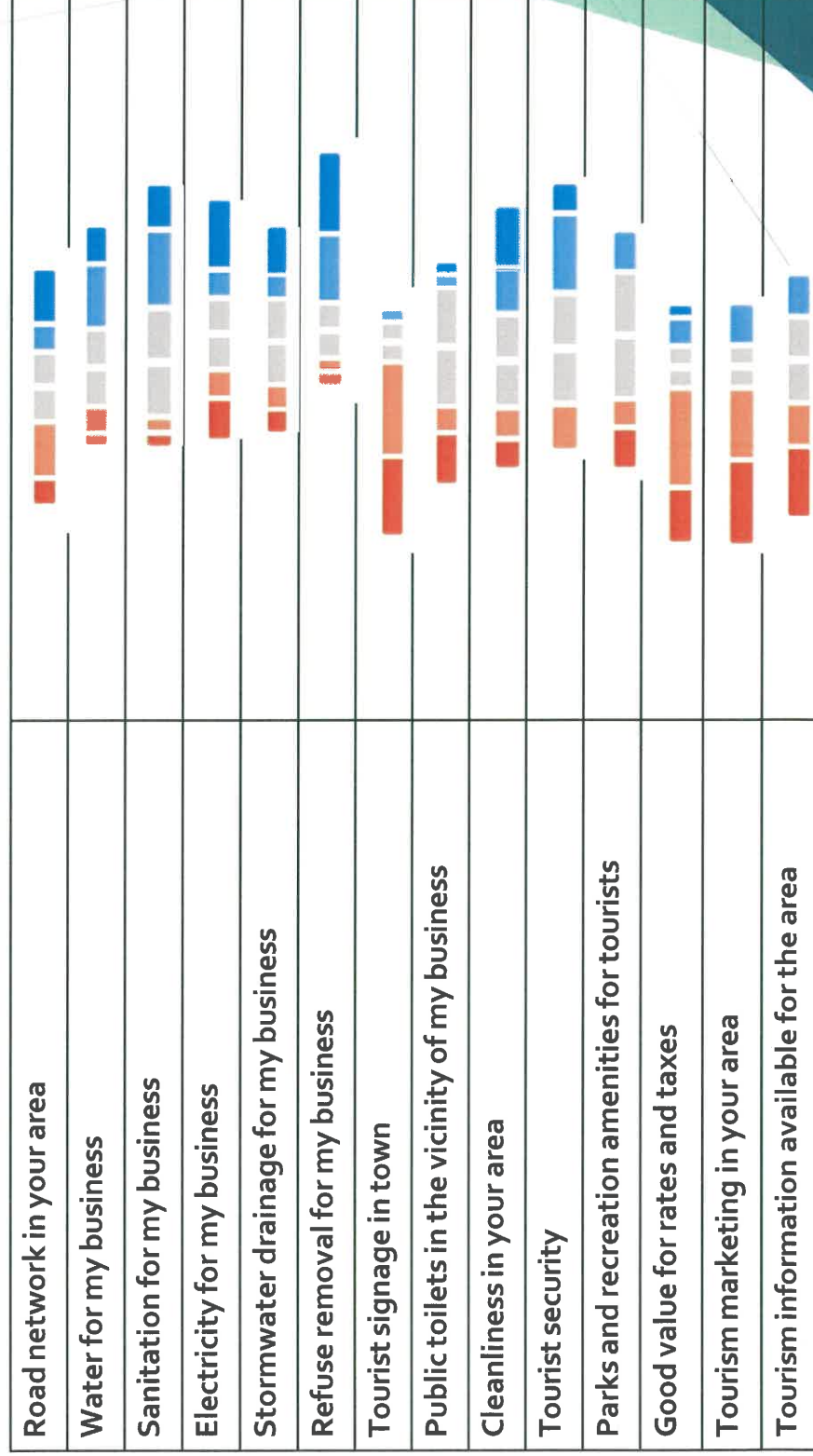
Offering	Competitive Advantage	Disadvantages
Wine tourism 	Numerous wine farms in the Elgin Valley offer both wine-tasting and mountain biking trails, appealing to two distinct types of tourists: those interested in wine culture and adventurous travellers.	Franschhoek stands out as a formidable competitor in wine tourism due to its significant wine industry and the allure of experiencing some of South Africa's finest wines. With its extensive array of vineyards, many visitors keen on wine culture prefer to visit Franschhoek for this exceptional experience.
Adventure tourism 	TWKM boasts an array of adventure tourism opportunities, featuring abundant mountain biking and hiking trails for enthusiasts to explore.	What sets Franschhoek apart competitively, is their provision of guided kick scooter tours, catering to both families seeking leisurely exploration and more adventurous individuals keen to discover the town and its surroundings.
Country culture (also include art) 	TWKM boasts cultural attractions such as the Caledon Museum and the sole bike museum in the Southern Hemisphere. As well as numerous farm stalls offer fresh local produce, while a casino in Caledon provides further entertainment.	Franschhoek also has a strong country culture which makes it a strong competitor for TWKM.

Offering	Competitive Advantage	Disadvantages
Weddings 	The growing wedding industry in TWKM enhances the tourism sector by capitalising on unique geographical features, cultural heritage, and specialised services that attract couples seeking distinctive experiences.	Failure to combine tourism packages or involve various stakeholders in the wedding industry can limit the overall appeal of the area to tourists, resulting in missed opportunities for economic growth and diversity.
Water sport 	TWKM is home to the Theewaterskloof Dam and the distinctive Eikenhof Dam, which stands out with its unique 2km straight line making it perfect for canoe racing.	Underdeveloped state-owned land in South Africa limits socio-economic progress and hinders the well-being of local communities.
Fynbos and natural areas 	TWKM has many natural areas like the Wildflower Garden as well as the Kogelberg Biosphere which attracts nature enthusiasts.	Franschhoek does not offer that much to visitors who are interested in nature.
Apple industry 	The Grabouw/Elgin valley in TWKM gains significant advantages from its robust apple industry. It creates local expertise in apple cultivation and enhances the region's brand identity.	The Citrus Festival at Boschendal, near Franschhoek could overshadow the TWKM apple industry by drawing attention and visitor away.

Satisfaction- & Confident Levels

Some of the key points stakeholders showed their satisfaction levels in and should be looked at to improve:

● Very dissatisfied ● Dissatisfied ● Neutral ● Satisfied ● Very satisfied



SWOT-Analysis



S

W

O

T

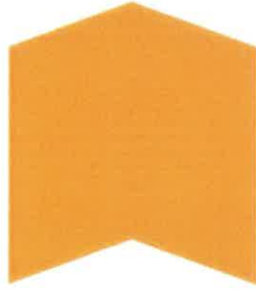
Vision & Outcomes

Outcomes



Establishing
TWK as a
leading
destination by
improving
infrastructure
and offering
diverse
tourism
experiences

Impact



Positioning
TWK
municipal
region as
the best in
the Cape
Countryside

Vision



To be
recognised
as the
foremost
destination
in the Cape
Countryside

Strategic Framework for Tourism Development

Impact/Positioning Theewaterskloof Municipality as the best in the Cape Countryside

Vision: To be recognized as the foremost destination in the Cape Countryside, celebrated for its natural beauty, vibrant agriculture, and outstanding tourism experiences

Objectives

Increase brand recognition and visibility through targeted marketing campaigns that highlight the region's unique tourism offerings.

Diversify and improve tourism attractions, activities, and services while promoting sustainable tourism practices.

To strategically develop the municipality's tourism assets and infrastructure to enhance visitor satisfaction by identifying key attractions, improving infrastructure, and mapping out the destination's development trajectory.

Maintain a robust infrastructure that ensures safety, accessibility, and environmental sustainability to support tourism growth.

Destination
Marketing & Coordination

Tourism Experience
and Enhancement

Destination Planning

Enabling
Environment

Pillars

Outcomes

Establishing Theewaterskloof as a leading destination by improving infrastructure and safety measures, enhancing visitor satisfaction through diverse tourism experiences.

Successfully **positioning** Theewaterskloof as a top destination in the Cape Countryside.

Sustainable Growth and Innovation

Value chain optimisation

Destination Management Foundation

Each pillar has the following objective:

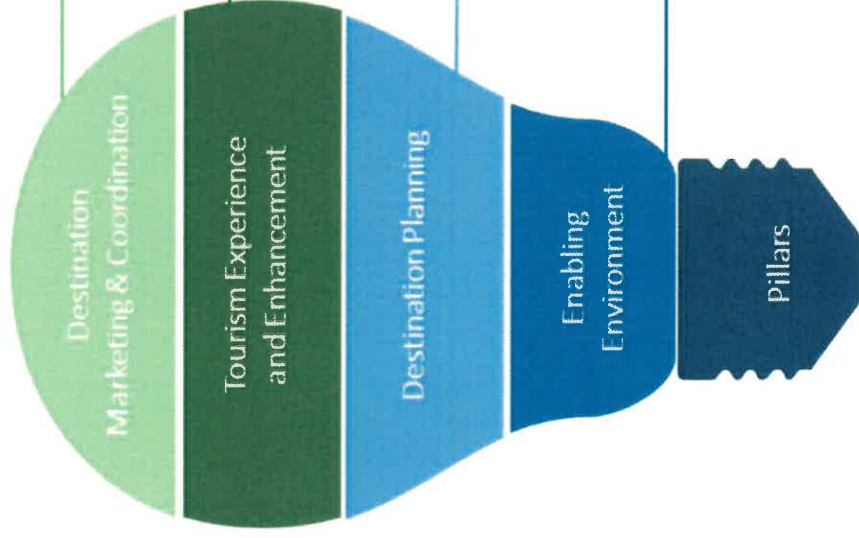
Objectives

Increase brand recognition and visibility through targeted marketing campaigns that highlight the region's unique tourism offerings.

Diversify and improve tourism attractions, activities, and services while promoting sustainable tourism practices.

To strategically develop the municipality's tourism assets and infrastructure to enhance visitor satisfaction by identifying key attractions, improving infrastructure, and mapping out the destination's development trajectory.

Maintain a robust infrastructure that ensures safety, accessibility, and environmental sustainability to support tourism growth.



Enabling Environment

Output	Recommended Action	Responsibility
Infrastructure Development and Maintenance	Identify and prioritise infrastructure projects such as roads and public transport systems that enhance connectivity and accessibility to tourist attractions in the area	TWKM, Department of Transport
	Regular maintenance and upgrades to ensure safety and operational efficiency	TWKM, Department of Transport
Safety and Security Measures	Implement safety protocols for tourist facilities	TWKM, Tourism Representative, Local Law Enforcement Agencies
	Enhance law enforcement and emergency response in tourist area	TWKM, Tourism Representative, Local Law Enforcement Agencies
Environmental Sustainability Initiatives	Promote sustainable practices among tourism operators and local communities	TWKM, LTAs/LTOs, Environmental Agencies
Accessibility	Ensure infrastructure and facilities are accessible to all visitors, including those with disabilities	TWKM, Infrastructure Development Teams
Public Awareness and Education	Educate tourists and local communities about the importance of sustainable tourism practices	TWKM, Tourism Representative
	Provide training programmes for tourism stakeholders on safety, environmental conservation and accessibility	Local Community Leaders, LTAs/LTOs

Destination Planning

Output	Recommended Action	Responsibility
Identify key attractions in the area	Conduct a comprehensive inventory	TWKM, Tourism Representative
	Analyse visitor preferences and market trends to prioritise attractions with high tourism potential	TWKM, Tourism Representative
	Assess current infrastructure (roads, utilities, public facilities) and identify deficiencies	TWKM, Tourism Representative
Infrastructure Improvement Plan	Develop a plan to upgrade infrastructure to support tourism needs , considering accessibility and environmental impact	TWKM, Tourism Representative
	Seek funding and partnerships for infrastructure projects	TWKM, Tourism Representative
	Develop a comprehensive destination development strategy aligned with sustainable tourism principles	TWKM
Destination Development Strategy	Identify and protect cultural and natural heritage sites	TWKM, LTAs/LTOs
	Stakeholder engagement (local communities, businesses, NGOs) in planning and decision-making processes	LTAs/LTOs, Local Community Representative

Tourism Experience Enhancement

Output	Recommended Action	Responsibility
Diversify Tourism Products and Services	Identify new tourism products and experiences that highlight the area's cultural, natural and historical richness	LTAs/LTOs, Tourism Representative, Local Community Members
	Develop and enhance existing attractions and facilities to cater to diverse visitor interests	LTAs/LTOs, Tourism Representative
Promote Sustainable Tourism Practices	Implement sustainable tourism programmes for tour operators and tourism attractions in the area	LTAs/LTOs
	Educate tourists and local communities on sustainable behaviours and environmental conservation	Environmental NGOs, Tourism Representative
Infrastructure Development and Improvement	Upgrade tourism-related infrastructure (roads, signage, visitor centres) to enhance accessibility and visitor experience	TWKM, LTAs/LTOs
	Develop eco-friendly infrastructure projects that minimise environmental impact	TWKM
Cultural and Heritage Preservation	Preserve and promote cultural heritage sites and traditions through interpretation programmes and community engagement	LTAs/LTOs, Cultural Community Leaders
	Support initiatives that revive and sustain local arts, crafts and cultural practices	LTAs/LTOs, Cultural Community Leaders
Enhance Tourism Experiences	Enhance visitor experiences through guided tours, storytelling sessions and interactive activities	LTAs/LTOs, Cultural Community Leaders, Tour Operators
	Integrate technology to provide immersive and educational experiences	LTAs/LTOs

Destination Marketing & Coordination

Output	Recommended Action	Responsibility
Marketing Collateral	Design promotional material showcasing unique tourism offerings in the area. The digital billboard at the Elgin Market should get utilised for this	LTAs/LTOs, Stakeholders, Marketing Committee/Design Team
	Create visually appealing content for social media platforms	LTAs/LTOs, Stakeholders, Marketing Committee/Design Team
	Develop a website dedicated to promoting tourism in the region	LTAs/LTOs, Stakeholders, Marketing Committee/Design Team
	Plan and execute digital advertising campaigns	Marketing Committee
Digital Marketing Campaigns	Produce engaging content (blogs/videos) highlighting attractions and experiences in the area	Stakeholders, Marketing Committee/Design Team
	Forge partnerships with local businesses, tour operators and hospitality providers	LTAs/LTOs
	Collaborate with travel influencers and bloggers to promote the region	TWKM, LTAs/LTOs, Marketing Committee
Partnerships and Collaborations	Participate in tourism trade shows and events	TWKM, LTAs/LTOs, Marketing Committee
	Organise local events and festivals to attract visitors	TWKM, LTAs/LTOs, Marketing Committee
	Involve the community in tourism initiatives and projects	TWKM, LTAs/LTOs, Marketing Committee
	Encourage locals to share positive experiences on social media	TWKM, LTAs/LTOs, Marketing Committee

Priority Projects

Establishing a Tourism Working Group

The tourism working group will bring together local stakeholders to develop strategies that boost tourism in TWK

Develop a comprehensive tourism database

The tourism database will centralise data on local assets, businesses, visitors and trends to support tourism planning in TWK

Tourism signage

Tourism signage improves visitor experience, directions, accessibility while boosting visibility and encouraging spontaneous visits

Enhance community-based tourism

Empowers locals, fosters economic growth, preserves culture, and promotes sustainability to align with community values

Leverage on agri-tourism opportunities

Offers authentic experiences like farm tours, fruit picking and wine tastings

Brand recognition

Creating memorable identity that highlights its unique offerings and values to make it a stand-out destination

Tourism focus shifts from **Tourism Volume** **Tourism Value**

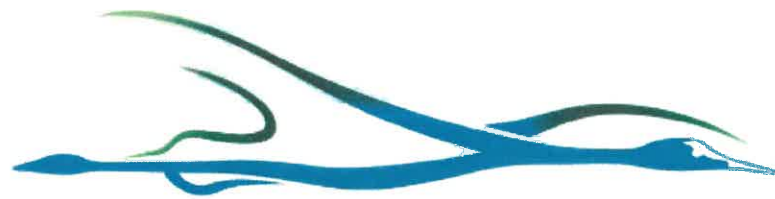
- The success of tourism should not only be measured by how many visitors come to Theewaterskloof, but by how much local economic value those visitors leave behind
- Our objective must be to build a **Tourism Economy** in which local businesses supply the visitor economy, create decent jobs and enterprise opportunities.
- Visitors stay longer and spend across our towns, and municipal services create an environment in which tourism can thrive.
- Tourism is therefore not a stand-alone municipal function—it is an economic ecosystem supported by every municipal department.

https://www.linkedin.com/posts/richijjuls1_tourismeconomy-destinationstrategy-economicdevelopment-share-7496525478502211584-8Lp6?utm_source=social_share_send&utm_medium=and

Way forward

- Council Approval
- Align Tourism Priorities with the IDP, SDBIP and Budget
- Integrate Tourism Across Municipal Departments
- Prioritise implementation of priority projects





Theewaterskloof Municipality



Tourism Strategy

Draft
October 2024

Prepared by:	Urban-Econ Development Economists
Contact person:	Mélany Loots / Chanel Barnard
Contact details:	Unit 4, Waterkloof Park 469, Julius Jeppe Street Waterkloof, Pretoria, 0181 Tel: +27 12 342 8686 Cell: +27 74 550 5754 Email: melany@urban-econ.com / chanel@urban-econ.com



Prepared for:	Theewaterskloof Local Municipality
Contact person:	Busisiwe Fadana
Contact details:	6 Plein Street Caledon, 7230 Tel: +27 82 143 310 Cell: +27 73 008 3857 Email: busisiwefa@twk.gov.za



Table of Contents

1. Introduction	1
1.1. Background	1
1.2. Scope of work.....	1
1.3. Methodology.....	2
1.4. Stakeholder Engagement.....	3
1.5. Report Structure	3
2. Environmental Scan	4
2.1. Spatial Overview	4
2.2. Transport and Movement Networks	13
2.3. Biodiversity and Natural Assets	15
2.3.1. Kogelberg Biosphere Reserve	15
2.3.2. Natural Environment	16
2.3.3. Vegetation Types	16
2.4. Socio-Economic Profile	18
3. Policy Overview	24
3.1. National Policy Review	24
3.2. Provincial Policy Review	26
3.3. Local Policy Review	27
4. Tourism Status Quo	31
4.1. Tourism Demand and Market Access	31
4.2. South African Tourism Performance Overview	31
4.3. Provincial Tourism Performance Overview	33
4.3.1. International Performance	34
4.4. Local Tourism Performance Overview	39
4.4.1. Overberg Visitor Trends and Patterns	39
4.4.2. Theewaterskloof Tourism Performance	42
4.5. Market Trends.....	44
4.6. Tourism Offering and Positioning	45
4.6.1. Key Attractions/Activities	46
4.6.2. Destination Positioning.....	50
4.7. SWOT Analysis.....	53
5. Strategic Framework and Direction	54

5.1. Vision.....	56
5.2. Objectives.....	56
6. Tourism Development Pillars	58
6.1. Enabling Environment.....	60
6.2. Destination Planning	61
6.3. Tourism Experience Enhancement	62
6.4. Destination Marketing and Coordination	63
7. Institutional Environment	65
7.1. Institutional Structure.....	65
7.2. Municipality's Mandate	66
7.3. Main challenges	72
7.3.1. Key considerations	74
8. Implementation Priorities	79
8.1. Establishing a Tourism Working Group.....	80
8.2. Develop a comprehensive tourism database	81
8.3. Tourism Signage.....	83
8.4. Enhance community-based tourism	85
8.5. Leverage on agri-tourism opportunities	87
8.6. Brand recognition	89
9. General Remarks	92
Annexure A.....	93

List of Figures

Figure 1: Methodology.....	2
Figure 2: Grabouw/Elgin tourist offerings	6
Figure 3: Botrivier tourist offerings.....	7
Figure 4: Caledon tourist offerings	8
Figure 5: Tesselaarsdal tourist offerings	9
Figure 6: Villiersdorp tourist offerings	10
Figure 7: Greyton/Genadendal tourist offerings	11
Figure 8: Riviersonderend tourist offerings	12
Figure 9: Socio-economic profile	18
Figure 10: Population groups in Theewaterskloof 2022.....	19
Figure 11: Total employment, TWKM, and Overberg.....	20
Figure 12: Unemployment rate- Theewaterskloof, Overberg and Western Cape, 2019-2023	21
Figure 13: National policy	25
Figure 14: Provincial policy	26
Figure 15: Local policy.....	28
Figure 16: South Africa's tourism performance.....	32
Figure 17: Total visitor numbers, South Africa	33
Figure 18: Western Cape tourism performance	34
Figure 19: International arrivals per province	35
Figure 20: Number of bed nights vs paid bed nights	36
Figure 21: International tourist spend in Western Cape	37
Figure 22: Purpose of visit to the Western Cape	38
Figure 23: Good to know visitor trends	38
Figure 24: Overberg visitor trends and patterns	39
Figure 25: Purpose of visit to the Overberg District	40
Figure 26: Top tourist activities in the Overberg District.....	41
Figure 27: Accommodation usage in the Overberg District.....	41
Figure 28: Theewaterskloof tourism performance.....	42
Figure 29: Bed nights of domestic and international tourists	43
Figure 30: Market trends	44
Figure 31: SWOT analysis	53
Figure 32: Strategic framework	55
Figure 33: Tourism development pillars	59
Figure 34: Institutional structure	66
Figure 35: Tourism working group functions	71
Figure 36: Implementation priorities.....	79

List of Maps

Map 1: Theewaterskloof Municipality	5
Map 2: Transport and movement networks.....	13
Map 3: Kogelberg biosphere.....	15
Map 4: Tourist offerings.....	46

List of Tables

Table 1: Report structure.....	3
Table 2: Traffic volumes on national roads.....	14
Table 3: Traffic volumes on provincial roads	14
Table 4: Vegetation types within Theewaterskloof municipal area	16
Table 5: Household income of Theewaterskloof	22
Table 6: National policy.....	25
Table 7: Provincial policy.....	26
Table 8: Local policy	28
Table 9: Tourist attractions/activities within Theewaterskloof	46
Table 10: Competitive advantages vs disadvantages	51
Table 11: Strategic objectives	56
Table 12: Enabling environment recommended actions	60
Table 13: Destination planning recommended actions	62
Table 14: Recommended actions for tourism experience enhancement	63
Table 15: Destination marketing & coordination recommendations.....	64
Table 16: Roles and responsibilities of LTOs.....	67
Table 17: Other stakeholder's roles and responsibilities.....	68
Table 18: Tourism working groups roles and responsibilities	70
Table 19: Main challenges	72
Table 20: Key considerations	75
Table 21: Establishment of a tourism working group.....	80
Table 22: Development of a comprehensive tourism database.....	81
Table 23: Tourism signage	83
Table 24: Community based tourism.....	85
Table 25: Leverage on agri-tourism opportunities	87
Table 26: Brand recognition.....	89

List of Abbreviations

Abbreviation	Meaning
AADT	Annual Average Daily Traffic
CBT	Community based tourism
CFR	Cape Floristic Region
CTIA	Cape Town International Airport
GDPR	Gross Domestic Product Per Region
GVA	Gross Value Added
IDP	Integrated Development Plan
KPI	Key Performance Indicator
LED	Local Economic Development
LM	Local Municipality
LTA	Local Tourism Authority
MBT	Minibus Taxi
MICE	Meetings, Incentives, Conferences and Exhibitions
NGO	Non-Governmental Organisations
NMT	Non-Motorised Transport
NTSS	The National Tourism Sector Strategy
OBD	Overberg District
PSC	Project Steering Committee
PSP	Public-Private Partnership
SANRAL	South African National Roads Agency
SDF	Spatial Development Framework
SMME's	Small Middle- and Medium Enterprises
TOR	Terms of Reference
TWG	Tourism Working Group
TWKM	Theewaterskloof Municipality
UBPL	Upper Bound Poverty Level
VFR	Visiting Friends and Relatives
VIC	Visitor Information Centre
VIP	Visitor Information Point

1. Introduction

The Theewaterskloof Local Municipality (TWKM) has formulated a Tourism Strategy to prioritise the sector within its integrated planning processes. The compilation of the situational analysis delineates the strategic significance of the study within Theewaterskloof Municipality, with a specific emphasis on identifying the key strengths and weaknesses of the tourism sector through a SWOT Analysis.

1.1. Background

The Theewaterskloof Local Municipality, positioned within the Overberg District in the Western Cape Province, operates as a category B municipality. It stands as one of four municipalities within the district, covering a significant portion of its geographic expanse, totaling one-third of the area. Embraced by a rich natural landscape, the municipality boasts attractions such as the Theewaterskloof Dam, the Kogelberg Biosphere, vineyards, crop and fruit fields, as well as diverse fynbos and wildflower habitats. Notably, these areas serve as habitats for the national bird, the blue crane.

The local community of Theewaterskloof is relatively poor due to its small tax and income generation, however, the municipality strives to improve infrastructure for services and product delivery. Theewaterskloof Municipality is valued due to its participation in processes to assist with a peaceful and safe environment for everyone, especially women and children. The municipality has a successful town management model that ensures that local government and democracy are extended to the local community.¹

The municipality has identified tourism as a crucial factor in driving economic growth. A comprehensive tourism strategy serves to outline initiatives aimed at educating and empowering local communities to actively participate in the tourism sector. Moreover, this strategy provides a roadmap for the development of infrastructure projects geared towards enhancing the overall visitor experience. These projects may include improvements to transportation networks, upgrades to public spaces, and the preservation of cultural and natural heritage sites. Such investments not only cater to the needs of tourists but also contribute to an enhanced quality of life for the local community.

1.2. Scope of work

The overall purpose of this phase to gather all relevant information on the existing tourism situation in the municipality to provide a background and analysis of the current demographic, social, and economic characteristics of the municipal area to reflect on changes. The primary objective of this report is to provide a robust SWOT analysis, examining the Strengths, Weaknesses, Opportunities, and Threats of the current tourism environment in the Theewaterskloof municipal area, and conduct a needs assessment to identify challenges and opportunities in the existing tourism landscape.

¹ THEEWATERSKLOOF LOCAL MUNICIPALITY, GEOGRAPHY, HISTORY & ECONOMY, 2024

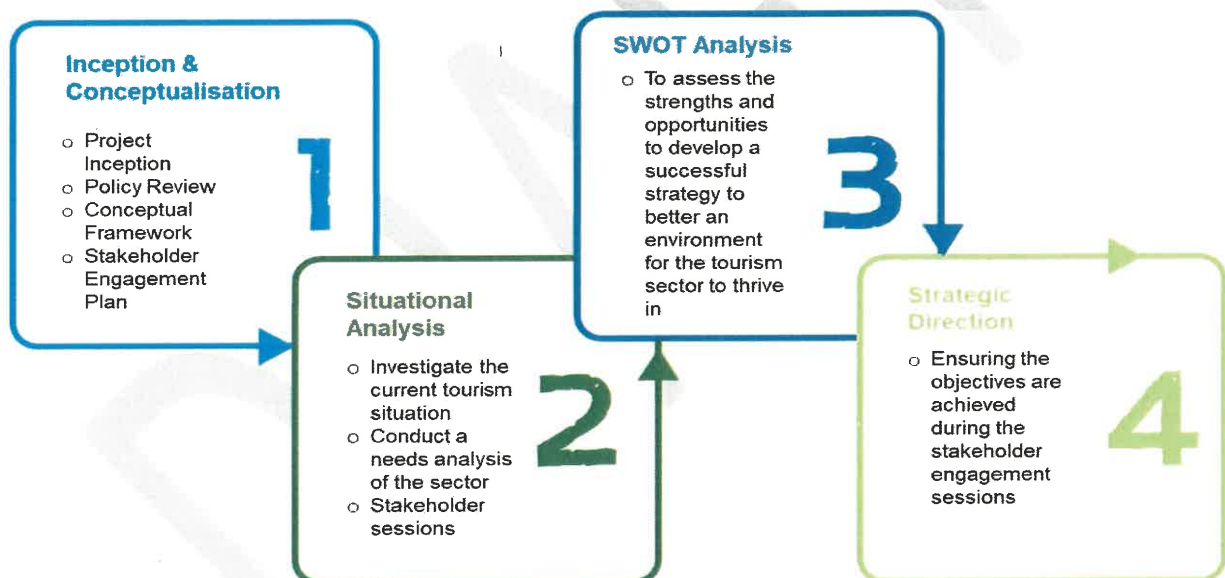
1.3. Methodology

The summarised methodology that follows has been developed based on Urban-Eon's understanding of the project and serves as a guideline for the steps taken to compile a tourism situational analysis for Theewaterskloof Municipality.

This led to the conceptualisation of the situational analysis to investigate the current tourism institutional environment by reviewing all relevant legislation, policies, and strategies. The next step was to do a demand and supply analysis for the tourism sector which was followed by stakeholder engagement sessions to gather input from sector role players.

The situational analysis expands on the proposed recommendations for supporting and improving the environment for the tourism sector in terms of infrastructure development, skills development, institutional capacity, and marketing. Thus, informing the strategic direction for Theewaterskloof Local Municipality.

Figure 1: Methodology



1.4. Stakeholder Engagement

The success of this strategy is embedded in the effective coordination and collaboration of all relevant tourism stakeholders in the Theewaterskloof Local Municipality. In the process of developing the tourism strategy, online engagement sessions were conducted with local tourism stakeholders to analyse their needs in the sector.

Stakeholder engagements involved representatives from both the public and the private sectors. Engagements were directed to determine the current state of tourism in the Theewaterskloof area. The focus to guide the strategy was on assessing destination accessibility, destination management, transformation, visitor experience, and marketing.

1.5. Report Structure

The table below outlines the report structure.

Table 1: Report structure

Section	Content
1	<u>Introduction</u> The first section consists of a brief introduction to this report and the undertaken study. Section one provides a dissect of the objective of the project and the methodology.
2	<u>Environmental Scan</u> This section reviews the current spatial elements relevant to all aspects of tourism planning and development.
3	<u>Policy Overview</u> This section looks at all relevant policies on a national, provincial, and local level.
4	<u>Tourism Status Quo</u> This section looks at the tourism performance on a national, provincial, district, and local scale as well as the market trends and tourism supply of the area. A SWOT analysis is included in this section.
5	<u>Strategic Framework and Direction</u> This section examines the foundational elements of development, along with the challenges and opportunities identified in each pillar during stakeholder sessions. Additionally, it presents a strategic framework aimed at improving the tourism sector in the region, along with a preliminary action plan.
6	<u>Tourism Development Pillars</u> This section concludes the document by highlighting factors critical to the success of the strategy.
7	<u>Institutional Environment</u> This section outlines the mandate of the TWK municipality, detailing its institutional structure, key challenges, and the strategies to address each challenge.
8	<u>Implementation Priorities</u> This section explores the key priorities for integrating the recommendations for the development of the tourism sector.

2. Environmental Scan

2.1. Spatial Overview

The municipal area covers 3 259 km², which constitutes approximately 26.6% of the Overberg District (OD) geographical area. This municipality is the largest local authority in the OD as it houses 13 wards and 42% of the total district population. It borders the Cape Metro and Cape Winelands District. Theewaterskloof Municipality can be categorised as a rural area with open spaces and farming activities. The Theewaterskloof municipal area is a popular tourism destination and is well known for its natural assets such as the Kogelberg Biosphere, Theewaterskloof Dam, various mountain ranges, and fynbos.² The topography of Theewaterskloof can be described as a mixture of plains and hills with some patches of steep slopes and mountainous areas.

The western area of the municipality is the Elgin Valley, drained by the Palmiet River. The northern part is the valley of the Sonderend River including the Theewaterskloof Dam. The southern part is the Overberg plain drained by the Bot- and Klein Rivers.

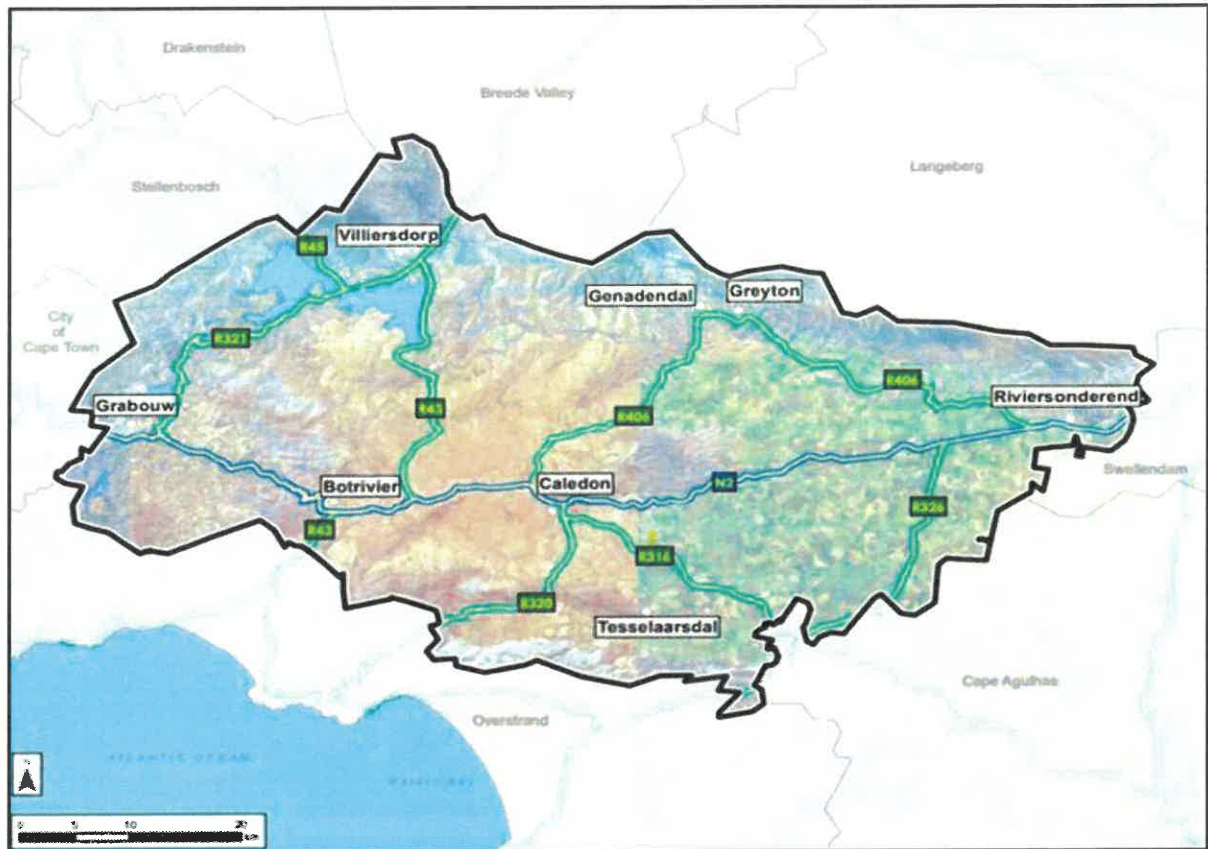
The main towns as shown on the map below are:

- Botriver
- Caledon
- Genadendal
- Grabouw
- Greyton
- Riviersonderend
- Tesselaarsdal
- Villiersdorp

Each of the eight towns and surrounding areas within the Theewaterskloof municipality has its unique character while they share the same authentic country experience.

² THEEWATERSKLOOF MUNICIPALITY, MUNICIPAL PROFILE, 2024

Map 1: Theewaterskloof Municipality



Source: Theewaterskloof Local Municipality LDP 29 May 2023

The following towns are in the jurisdiction of Theewaterskloof and have the following to offer for tourism and the development thereof:

- Grabouw/Elgin Valley
- Botrivier
- Caledon
- Tessaarsdal
- Villiersdorp
- Greyton/Genadendal
- Riviersonderend

Theewaterskloof offers diverse tourism offerings including breathtaking natural landscapes, renowned wine farms, picturesque apple farms, and exhilarating mountain biking and hiking trails detailed in the figures below.

Figure 2: Grabouw/Elgin tourist offerings



Figure 3: Botrivier tourist offerings

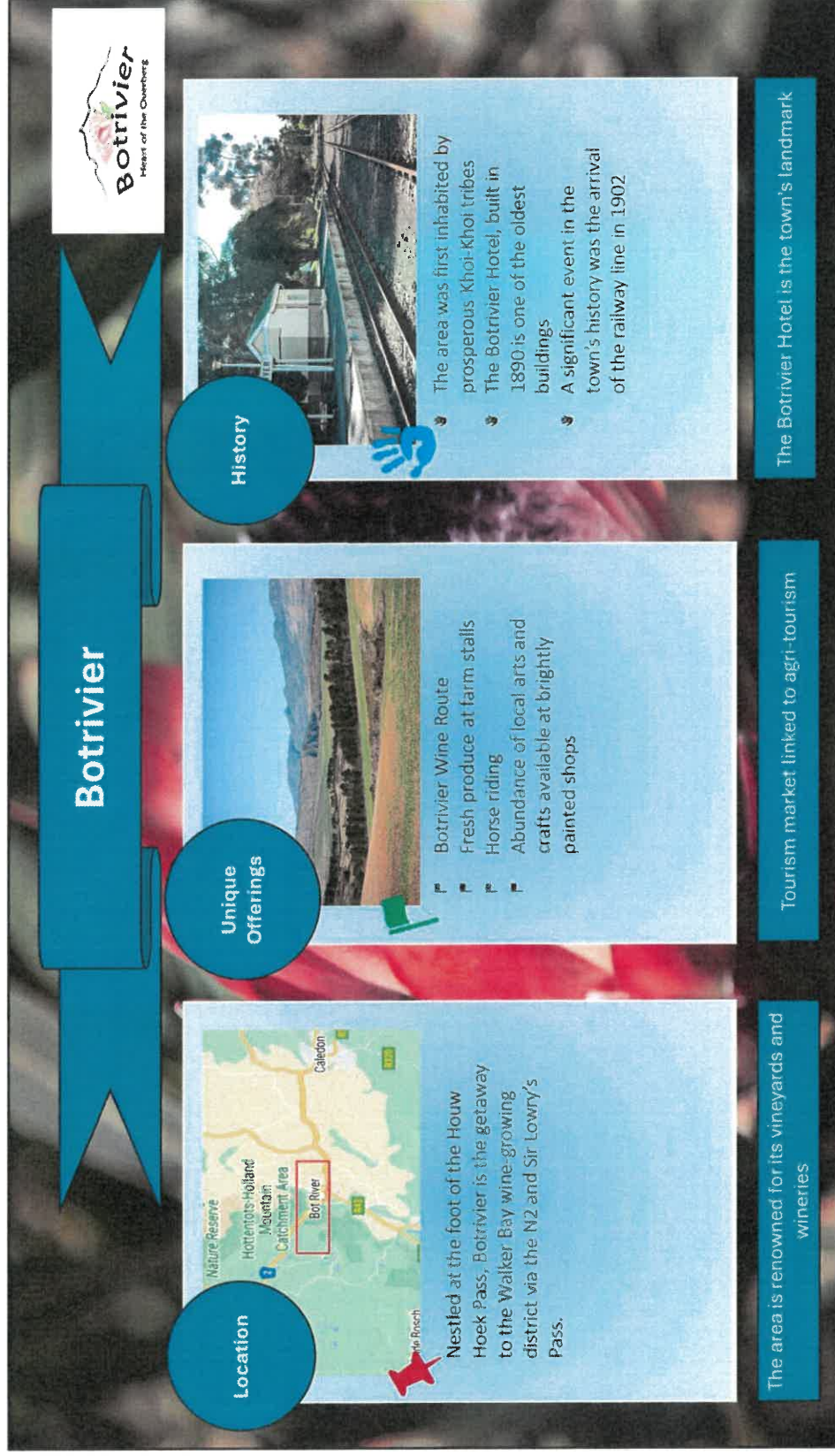


Figure 4: Caledon tourist offerings

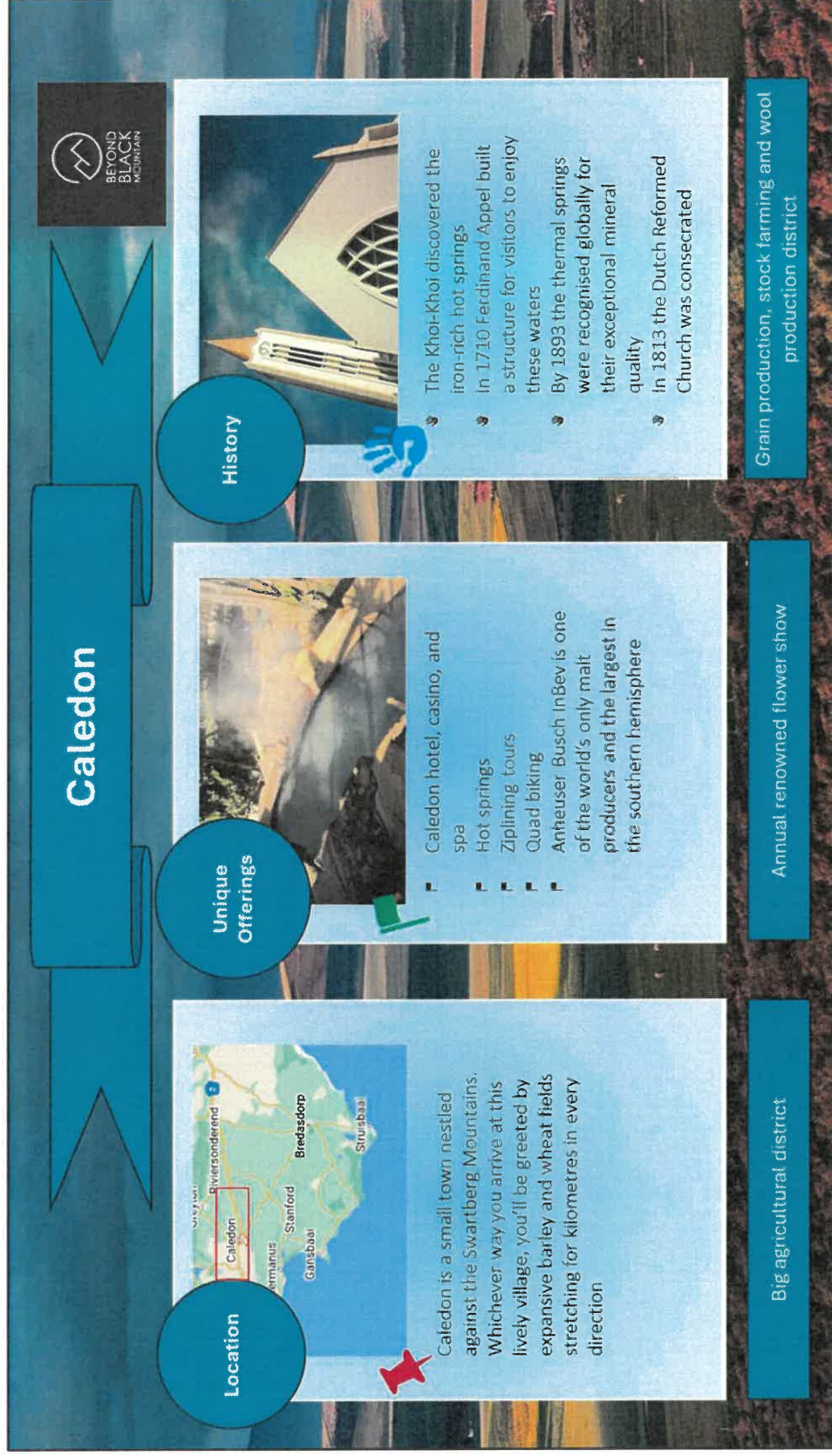


Figure 5: Tesselaarsdal tourist offerings

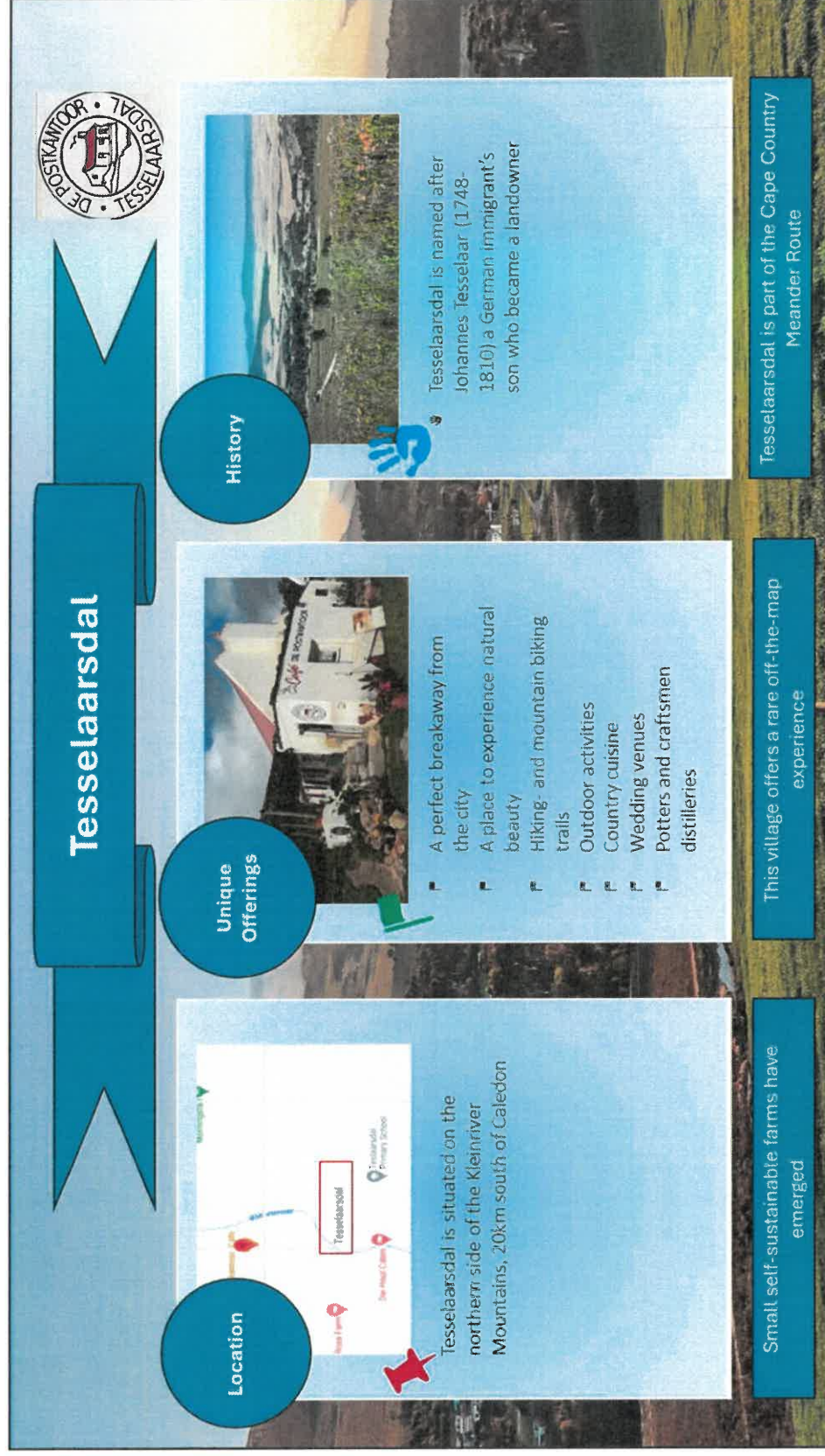


Figure 6: Villiersdorp tourist offerings



Figure 7: Greyton/Genadendal tourist offerings



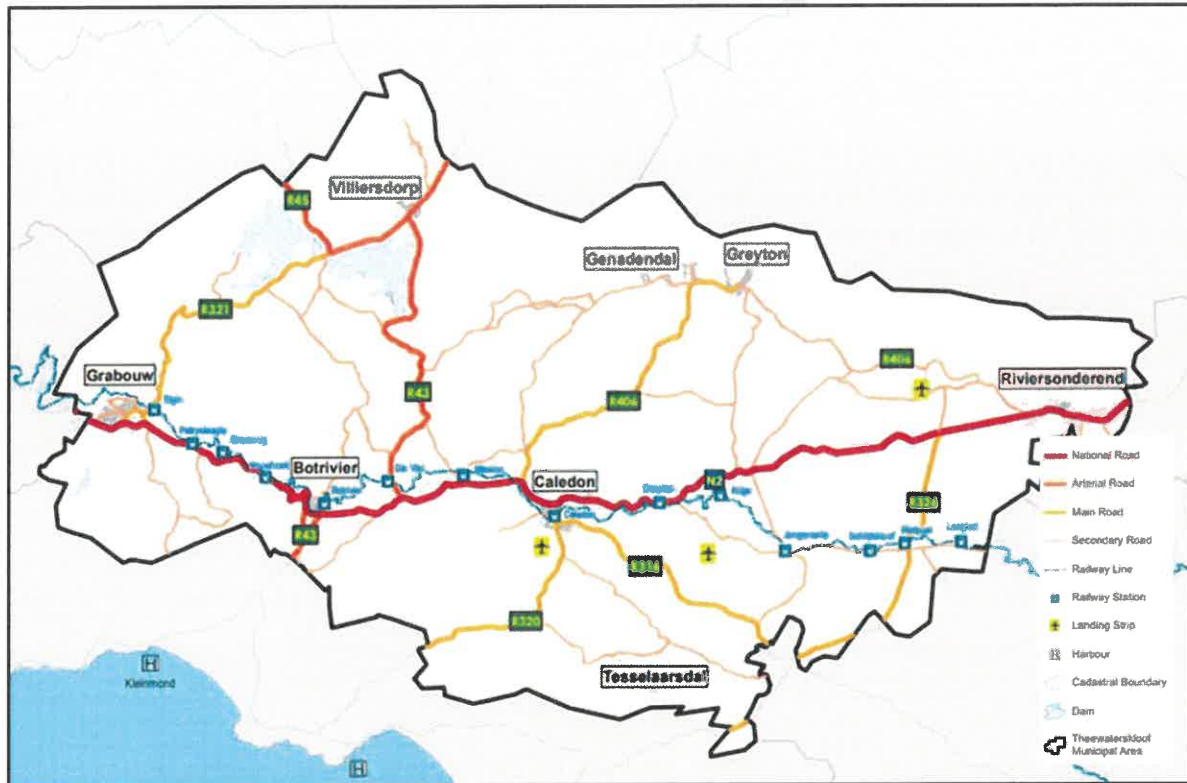
Figure 8: Riviersonderend tourist offerings



2.2. Transport and Movement Networks

The Theewaterskloof Local Municipality is situated between the N2 that links with a few provincial roads (R43, R406, R316, R321, R45) making it possible for travellers to have easy and direct access to the offerings within the municipality. The transport infrastructure within the Theewaterskloof municipal area includes road and rail transport. There are no airports in the Theewaterskloof municipal area; however, there are a few landing strips in the area as seen on the map below.

Map 2: Transport and movement networks



Source: SANRAL CTP 2013 yearbook contained in the Draft Theewaterskloof ITP, 2016.

The information below as received from the Local Integrated Transport Plan for TWKM (ITP, 2016) is an indication of the traffic volumes on the N2 by looking at the annual average daily traffic statistics.

Traffic Volumes on National Roads

The Theewaterskloof municipal area has the highest traffic volume out of the four municipalities within the Overberg District. The highest Annual Average Daily Traffic (AADT) in the TWKM is found on the N2 section between Gordon's Bay and Grabouw with 12 500 vehicles per day, with around 9% of them being heavy vehicles. Traffic volumes between Caledon and Swellendam are around 3500 vehicles per day. As seen in the table below the N2 between Caledon and Riviersonderend experiences the highest percentage of heavy vehicles at 12.9%, which supports the local retail trade sector because they require fuel and food, thereby being an injection for the local economy.

Table 2: Traffic volumes on national roads

Road Description	Length (km)	AADT ¹	AADTT ²	% Heavy Vehicles
N2 Sir Lowry's Pass	11.2	16 207	1 485	9.2
N2 Grabouw-Botrivier	29.2	12 500	1 135	9.0
N2 Botrivier-Caledon	54.3	7 500	715	9.6
N2 Caledon-Riviersonderend	24.2	3 100	400	12.9

Source: SANRAL CTP 2013 yearbook as contained in the Draft Theewaterskloof ITP (2016)

Traffic Volumes on Provincial Roads

The highest AADT along the provincial roads in the TWKM is on the R43 between Haston and Botrivier.

Table 3: Traffic volumes on provincial roads

Route	Road Link Description	AADT ¹	AADTT ²	% Heavy Vehicles
R43	Hawston-Botrivier	9 100	700	7.7
R44	Pringle Bay-Botrivier	4500	200	4.4
R316	Caledon-Napier	2 500	250	10.0
R321	Grabouw-Villiersdorp	2 500	400	16.0
R43	Caledon-Villiersdorp	2 200	350	15.9
R43	Worcester-Villiersdorp	1 300	150	11.5
R406	Caledon-Greyton	1 100	100	9.0

Source: SANRAL CTP 2013 yearbook contained in the Draft Theewaterskloof ITP (2016)

"Considering that it is the secondary road networks that feed increased traffic volumes onto national roads, the relatively high transport costs associated with the unchecked deterioration of the secondary roads remains a significant factor in South Africa's relative competitiveness in global markets."

– Fikile Mbalula, Minister of Transport

2.3. Biodiversity and Natural Assets

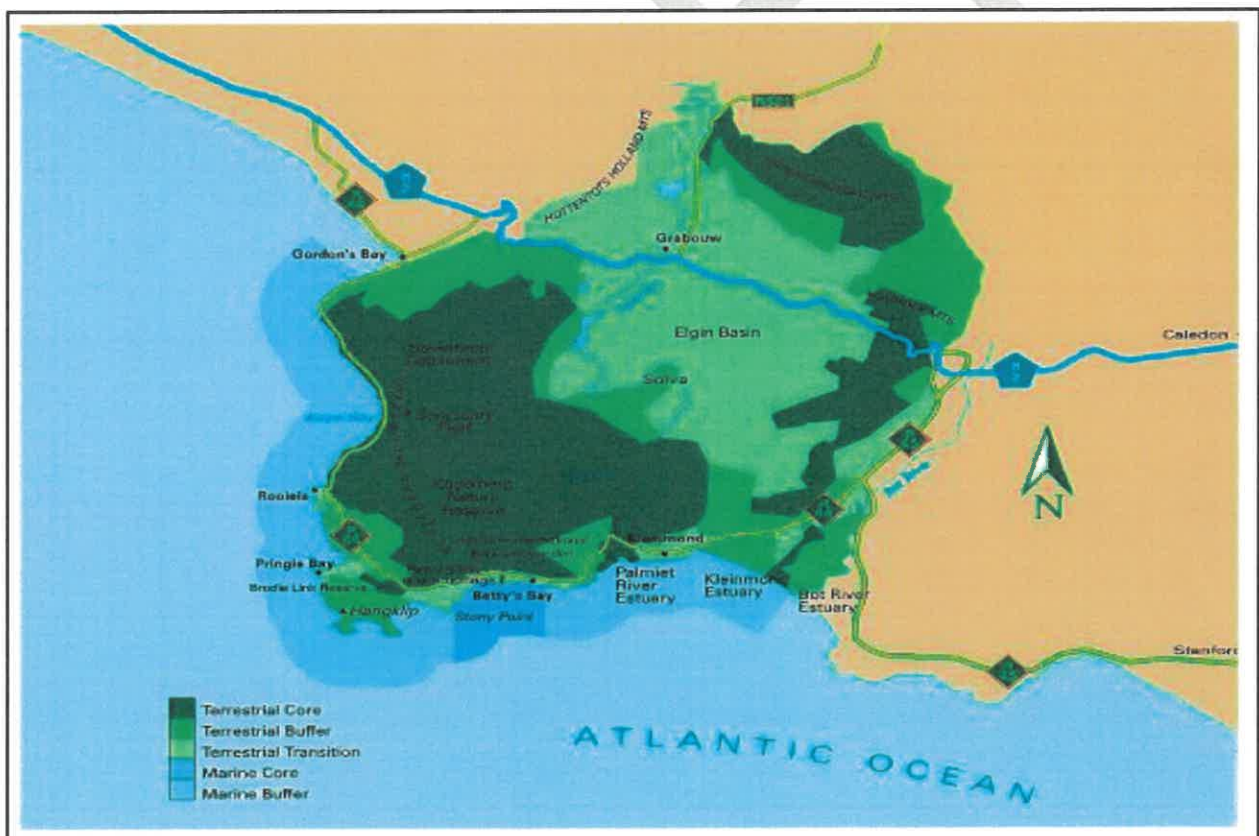
2.3.1. Kogelberg Biosphere Reserve

The Kogelberg Biosphere Reserve is South Africa's oldest biosphere as designated by UNESCO. The biosphere starts in the mountains above Gordon's Bay, and it includes land, sea, and towns along the coast just above Hermanus. It stretches inland past the town of Botriver and encompasses the growing economic hub of Grabouw. The Kogelberg Biosphere covers around 100,000 hectares of natural beauty.

The Kogelberg Biosphere is a must-visit place for several reasons. Firstly, it's known as the heart of the Cape Floral Kingdom, one of only six plant kingdoms globally. It's home to an incredible variety of plants, with over 1,880 species, including 77 that are unique to this area. Additionally, the marine life is also significant with over 3,550 species found only in this biosphere.³

The map below outlines the location of the Kogelberg Biosphere.

Map 3: Kogelberg biosphere



Source: Kogelberg Biosphere, Nature for Life, 2024.

³ KOGELBERG BIOSPHERE, NATURE FOR LIFE, 2024

2.3.2. Natural Environment

Theewaterskloof municipal area has no national parks, although it includes 8 conservation areas of which the largest is the Cape Nature Conservation near Villiersdorp. A portion of the Hottentots Holland Nature Reserve also lies within the municipal boundaries. There are three municipal nature reserves, namely Caledon, Villiersdorp, and Greyton; which protect important biodiversity elements in the area. Most of the high biodiversity priority areas for protection are in the lowlands located on private land and conserved through the Cape Nature stewardship programme, as well as initiatives such as conservancies.

Conservancies within TWKM include:

- Theewaters Conservancy
- Groenlandberg Conservancy
- Klein Swartberg Conservancy
- Akkedisberg Conservancy

2.3.3. Vegetation Types

The Theewaterskloof area consists of mainly two broad vegetation types, namely Renosterveld and Fynbos. The following types of fynbos can be found within the municipality area:

Table 4: Vegetation types within Theewaterskloof municipal area

Vegetation	Description
Sandstone fynbos	Found in the mountain ranges in the western, southern, and northern parts of the municipality, which include the Kogelberg, Hottentots Holland, Groenlandberg, Babylonstoring/Shaw's Mountain, Klein River, Klein Swartberg and the Riviersonderend mountains. This type of vegetation occurs in sandy, acid soils that are highly infertile and not suitable for agriculture.
Renosterveld fynbos	Renosterveld vegetation is found in the low-lying areas within the municipality, mostly on shale-derived soils. This is a fertile type of vegetation, but highly threatened due to the result that most of the renosterveld vegetation is lost due to agriculture, with only a small amount remaining on slopes that are too steep or rocky to cultivate.
Shale fynbos	In the Elgin area between the mountains and further east on the mountain foot slopes, this vegetation type is found. This vegetation typically occurs in an area that receives higher rainfall. Even though it contains some elements of renosterveld vegetation it can still be classified as fynbos due to the dominant fynbos elements that are present. The shale fynbos is also threatened due to the fertile soils that are used for cultivation. ⁴

⁴ THEEWATERSKLOOF MUNICIPALITY, INTEGRATED DEVELOPMENT PLAN, 2022-2027

Water Resources



Theewaterskloof Municipal area consists of six catchment areas that are the Palmiet River, Bot River, Theewaterskloof Dam, Sonderend River, Klein River, and Sout River, and falls under the Breede-Gouritz Catchment Management Agency. Many water surface bodies are found within the TWKM area. This includes the Theewaterskloof Dam, Eikenhof Dam, Kogelberg Dam, Bot River, Palmiet River, Swart River, Sonderend River, and Klein River. The Theewaterskloof Dam is viewed as the most important one as it is the main water source for the city of Cape Town.

During the stakeholder engagement session, participants from the Grabouw, Elgin, and Villiersdorp areas highlighted the importance of Theewaterskloof Dam as a prominent tourist attraction yet expressed concerns about its underutilisation. *Recently, the Department of Water and Sanitation disseminated an Expression of Interest intending to attract potential investors interested in developing the state-owned land surrounding the Theewaterskloof Dam.*

Agriculture



One of the largest fruit and vegetable export economies falls within the Theewaterskloof municipal area and therefore is an integral part of the TWKM. Primary land use in the western areas within the municipality is characterised by apple production and vast wheat, whereas the central and eastern landscape of the municipal area is formed by canola fields.

Climate



The dominant Mediterranean climate is characterized by rainy winters and warm to hot, dry summers. This weather pattern fosters numerous outdoor activities popular within the municipality, promoting the tourism sector and playing a crucial role in fruit production for export. The bulk of rainfall typically falls from May to August surrounding the Groenlandberg Nature Reserve, and the Grabouw and Botriver areas. The eastern portion of the municipal area, including Riversonderend, receives less rainfall.

One of the climate change threats in certain areas of the Western Cape is the likelihood of floods with greater intensity and longer-term impacts as well as the increases in the severity and unpredictability of weather patterns. Theewaterskloof Municipality recognises climate change as a treat to the environment, its residents, and future development.

2.4.Socio-Economic Profile

The following illustration is an overview of the population demographics of TWKM. Some of the key socio-economic factors in the area such as population, education, employment, unemployment, poverty, safety, and basic service delivery are discussed in detail below.

Figure 9: Socio-economic profile

Theewaterskloof Local Municipality: Socio-Economic Profile						
Demographics						
		Population 120 823		 Households 33 097		
Education			Poverty			
		Matric pass rate: 79.2% Retention rate: 66.2% Learner-teacher ratio: 29.6%		 Gini coefficient: 0.595 Human development index: 0.67		
Health						
		Primary health care facilities: 17		 Maternal mortality ratio (per 100 000 live births): 131		
		Immunisation rate: 80.4%		 Teenage pregnancies – delivery rate to women U/18: 16.6		
Safety and Security						
 Residential burglaries: 1083	 Driving under the influence: 278	 Drug-related crimes: 1 500	 Murder: 67	 Sexual offences: 143		
Access to Basic Service Delivery						
 Water: 98.4%	 Refuse removal: 78.7%	 Electricity: 92.8%	 Sanitation: 90.1%	 Housing: 77.5%		
Road Safety		Labour		Socio-Economic Risks		
Road fatalities: 28		Unemployment rate: 8.8%		Risk 1: Low economic growth Risk 2: Deteriorating education outcomes Risk 3: Majority low-skilled labour force		
Largest Three Sectors						
Wholesome, retail trade, caterina & accommodation 17.9%		Finance, insurance, real estate & business services 15.9%		Agriculture, forestry & fishing 15.7%		

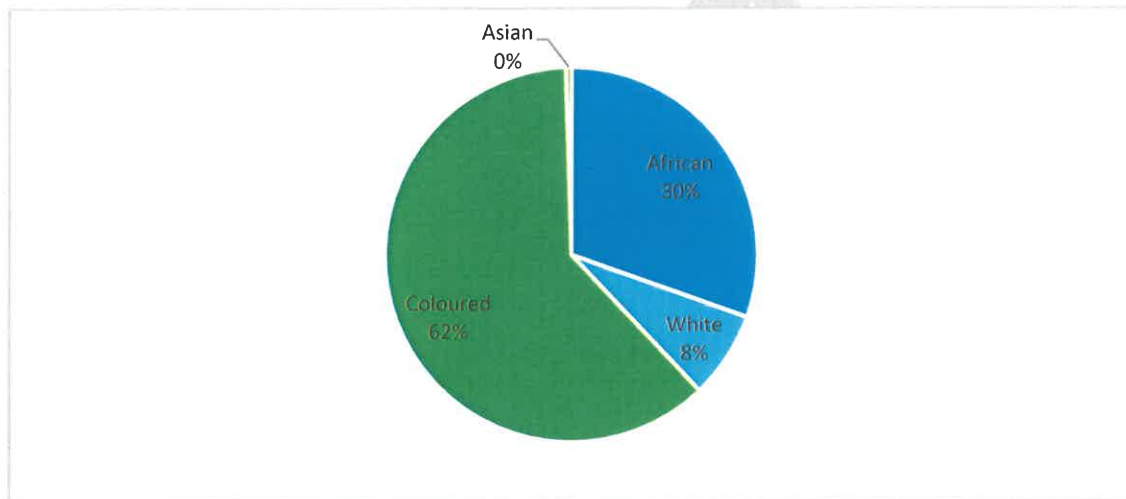
Source: Theewaterskloof Municipality Annual Report, 2022.

Population

With 124,000 or 39.9% of people living in TWKM, it has been the most populous region in the Overberg district over the past decade closely followed by Overstrand, Swellendam, and Cape Agulhas. Between 2012 and 2022 the average population growth rate was 1.18%, which is slightly below the growth rate of 1.47% for the whole of South Africa. Theewaterskloof population is projected to grow at an average annual rate of 1.2% from 124,000 to 132,000 in 2027.⁵

The gender population of Theewaterskloof is 61,518 (49.73%) male and 62,192 (50.27%) female of the total 123 710. As seen in the figure below, the biggest population racial group in Theewaterskloof is coloured with 61.53% and the smallest group is Asian with 0.52%.

Figure 10: Population groups in Theewaterskloof 2022



Source: Theewaterskloof Statistical Overview, 2023.

Education

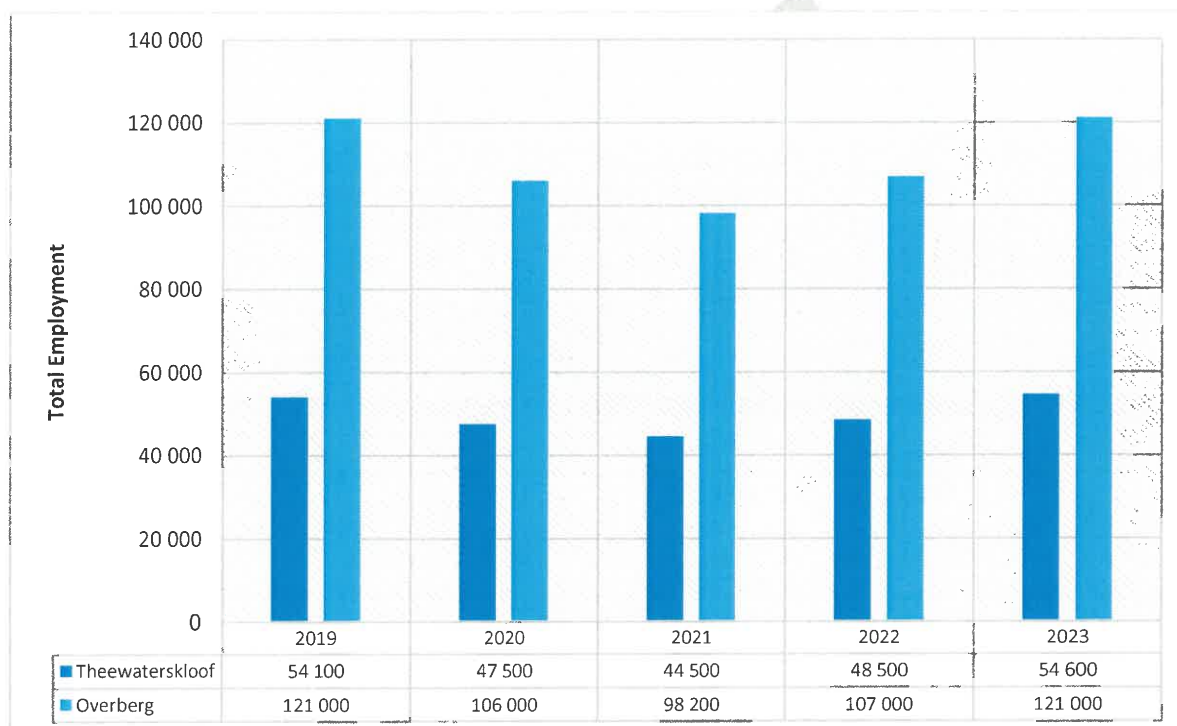
In TWKM, the number of individuals lacking any formal education declined from 2012 to 2022 at an average annual rate of -1.97%. Meanwhile, the population falling under the “matric only” category rose from 15,400 to 22,700 in 2022. Individuals with a diploma/certificate increased at an average annual rate of 3.77%, while individuals with a bachelor’s degree increased by 0.60% annually. This data is an indication that there is an overall increase in education, particularly among those with a matric qualification or higher.

⁵ WESGRO, RESEARCH OVERBERG DISTRICT, NOVEMBER 2022

Employment

In 2023, Theewaterskloof accounted for 54,600 jobs, constituting 45.17% of total employment in the Overberg District municipality (121,000), 2.12% of total employment in the Western Cape Province (2.57 million), and 0.34% of total employment in South Africa (16.3 million). Employment within Theewaterskloof saw an annual increase averaging 1.84% from 2013 to 2023. This growth rate surpasses the average annual labour force growth rate of 1.47% in Theewaterskloof Local Municipality, resulting in a decline in unemployment from 14.18% in 2013 to 11.22% in 2023 within the local area.

Figure 11: Total employment, TWKM, and Overberg



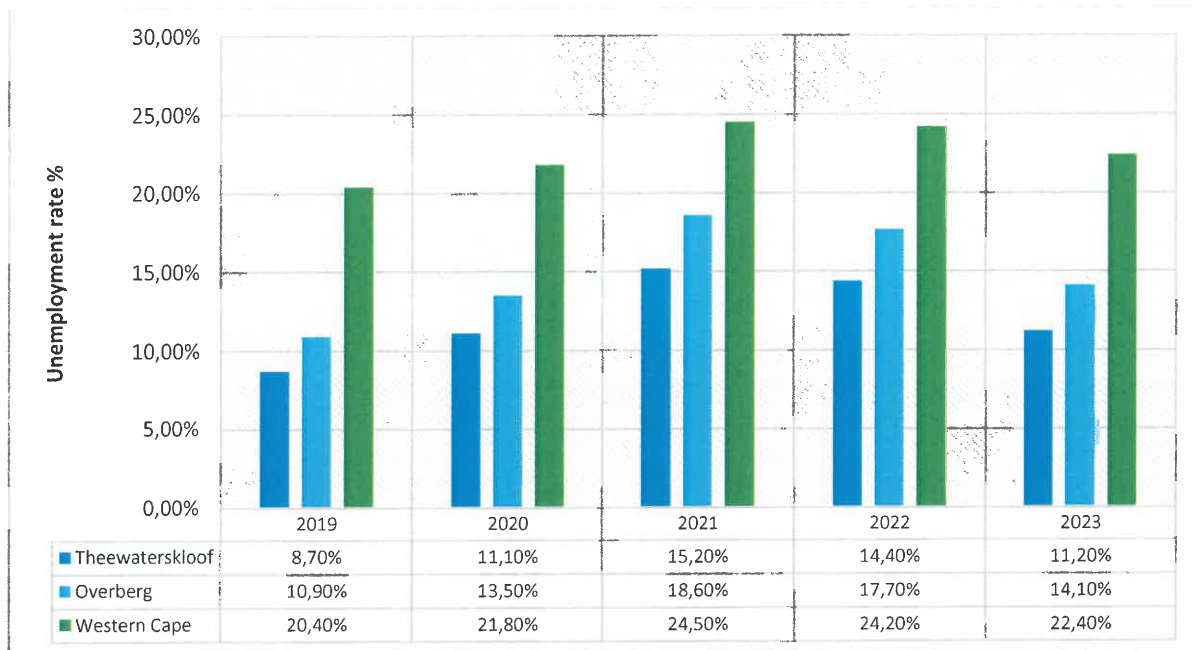
Source: Statistical Overview, Theewaterskloof, 2023.

In 2023, Theewaterskloof recorded 6,610 individuals as unemployed, showing a decrease of 607 from the 7,220 reported in 2013. This represents 33.12% of the total unemployed population in the Overberg District Municipality. Theewaterskloof Local Municipality witnessed an average annual decline of -0.87%

Education is crucial for economic development and shaping the region's future. A well-educated workforce brings essential skills, knowledge, and innovation to the tourism industry, enhancing service quality and attracting investment. Education fosters cultural appreciation and environmental awareness among residents, enriching the visitor experience and supporting sustainable tourism practices. However, limited educational opportunities can hinder economic and tourism sector growth.

in unemployment, which was more favourable compared to the Overberg District Municipality's average annual decrease of -0.09% in unemployment.

Figure 12: Unemployment rate- Theewaterskloof, Overberg and Western Cape, 2019-2023



Source: Theewaterskloof Statistical Overview 19 July, 2023.

Employment is crucial for regional prosperity, providing economic stability and social well-being especially in tourism-dependant areas. A robust tourism sector generates jobs directly in hospitality, leisure, and services, while also supporting employment in related industries. A healthy job market attracts skilled workers and sustains local communities. However, insufficient employment opportunities can lead to economic stagnation and social challenges hindering tourism sector growth and sustainability. Prioritising employment initiatives not only boosts the local economy but also enhances the area's reputation as a tourist destination by ensuring high service standards.

Gross Value Added (GVA)

The Theewaterskloof Local Municipality's economy encompasses a range of industries. The Gross Value Added (GVA) for Theewaterskloof offers a breakdown by sector, quantifying the value each sector contributes to the local economy through its value.

In 2023, the agricultural sector emerged as the primary contributor to the economy of Theewaterskloof Local Municipality, representing R3.7 billion or 25.0% of the municipality's total Gross Value Added (GVA).

Following closely, the community services sector contributed 16.7% to the GVA, while the trade sector accounted for 14.2%. Conversely, the mining sector made the smallest contribution to Theewaterskloof Local Municipality's economy, with R14.3 million or 0.10% of the total GVA. ⁶

Income Inequality and Poverty

The income for households living in the TWKM area is divided into low-, middle- and high-income brackets. Approximately 57.6% of households in TWKM fall within the low-income bracket, with 11.8% of households having no income as shown in the table below. The table below also indicates the projected (2033) number of people in each income bracket.⁷

Table 5: Household income of Theewaterskloof

Income Range (2020)		TWKM		
		%	People (2017)	People (2033)
Low Income	No Income	11.8	14 812	17 249
	R1-R6 327	2.0	2 586	2 923
	R6 328-R12 653	3.4	4 232	5 261
	R12 654-R25 306	17.3	17 163	25 280
	R25 307-R50 613	23.1	24 922	33 755
Middle Income	R50 614-R101 225	19.4	21 160	28 348
	R101 226-R202 450	11.7	15 047	17 097
	R202 451-R404 901	6.8	10 463	9 937
High Income	R404 902-R809 802	3.3	5 055	4 822
	R809 803-R1 619 604	0.9	1 528	1 315
	R1 619 605-R3 239 208	0.1	353	146
	R3 239 209 or more	0.2	235	292
Total:		100.0	117 558	146 125

Source: TWKM September, 2016. (Provincial Treasury)

⁶ THEEWATERSKLOOF MUNICIPALITY, STATISTICAL OVERVIEW, 2023

Safety

In the Theewaterskloof municipal area, there was a notable increase in the total number of reported murder cases from 43 in 2020/2021 to 59 in 2021/2022, resulting in a rise in the murder rate per 100 000 inhabitants from 36 to 48 over the same period.

Sexual offenses within TWKM reported 87 cases, compared to 295 in the Overberg District. The rate of sexual offenses (per 100,000 people) in TWKM was lower than that of the district in 2021/2022. Despite a marginal decrease in drug-related offenses within the Theewaterskloof municipal area from 925 cases in 2020/2021 to 923 cases in 2021/2022. Instances of driving under the influence of alcohol or drugs within the Theewaterskloof municipal area decreased from 85 in 2020/2021 to 73 in 2021/2022. Lastly, residential burglaries in Theewaterskloof increased from 612 in 2020/2021 to 624 in 2021/2022.

Safety and security are important for the sustainability of the tourism sector. Therefore, the success and failure of a tourism destination depends on providing a safe and secure environment for visitors. The impact of crime on visitors has a negative impact on the sector and it must be noted that tourists can be more vulnerable to crime. A location's image can suffer significantly from crime against tourists. Therefore, it is important to look at the objectives of the Tourism Safety Strategy of the Western Cape so that it can be applied to the Theewaterskloof municipal area.¹

Basic Service Delivery

Service delivery involves providing essential services such as safe water supply, electricity, healthcare, roads, street lighting, traffic control, waste collection, sewage disposal, maintenance, and municipal parks. In TWKM, sanitation is generally good with 95.09% of households having flush toilets where 1.36% use Ventilation Pits (VIP), and 0.12% of households relying on pit toilets. Despite a backlog, the number of households without hygienic toilets decreased from 1 850 in 2012 to 1 210 in 2022 which is an annual decline of -4.11%. Concerning water access, 75.09% of households have piped water inside their homes, 8.60% within their yards, and 0.91% have no formal piped water. Regarding electricity, 93.66% of households have it for lighting and other purposes, with 1.34% using it only for lighting. Refuse removal is weekly for 83.77% of households, less frequent for 1.70%, and managed personally by 3.59% of households in the area.

Basic service delivery forms the backbone for any thriving community, emphasizing its quality of life and overall attractiveness as a tourism destination. Theewaterskloof municipality is reliant on tourism and therefore the provision of essential services takes on priority. A reliable infrastructure, such as roads, water supply, sanitation, and electricity, is essential for supporting the needs of both residents and visitors. Efficient waste management systems and well-maintained public spaces contribute to a clean and pleasant environment that enhances the overall visitor experience and encourages repeat visits.

3. Policy Overview

This section outlines the pertinent national, provincial, and local economic development and tourism-related legislation, policies, and strategies within the Western Cape Province. These frameworks aim to promote responsible and sustainable tourism, fostering sector growth and enhancing the quality of life for local stakeholders. It is crucial for tourism sector plans to align closely with these policies to effectively achieve their objectives.

Why align with government priorities?

“The majority of government plans and processes are already tied to budget allocations. This is done to better interrelate and improve the operational effectiveness of projects. One of the only chances to successfully gain access to already dedicated pools of government funding is aligning to the already existing government programmes linked to that funding.”⁸

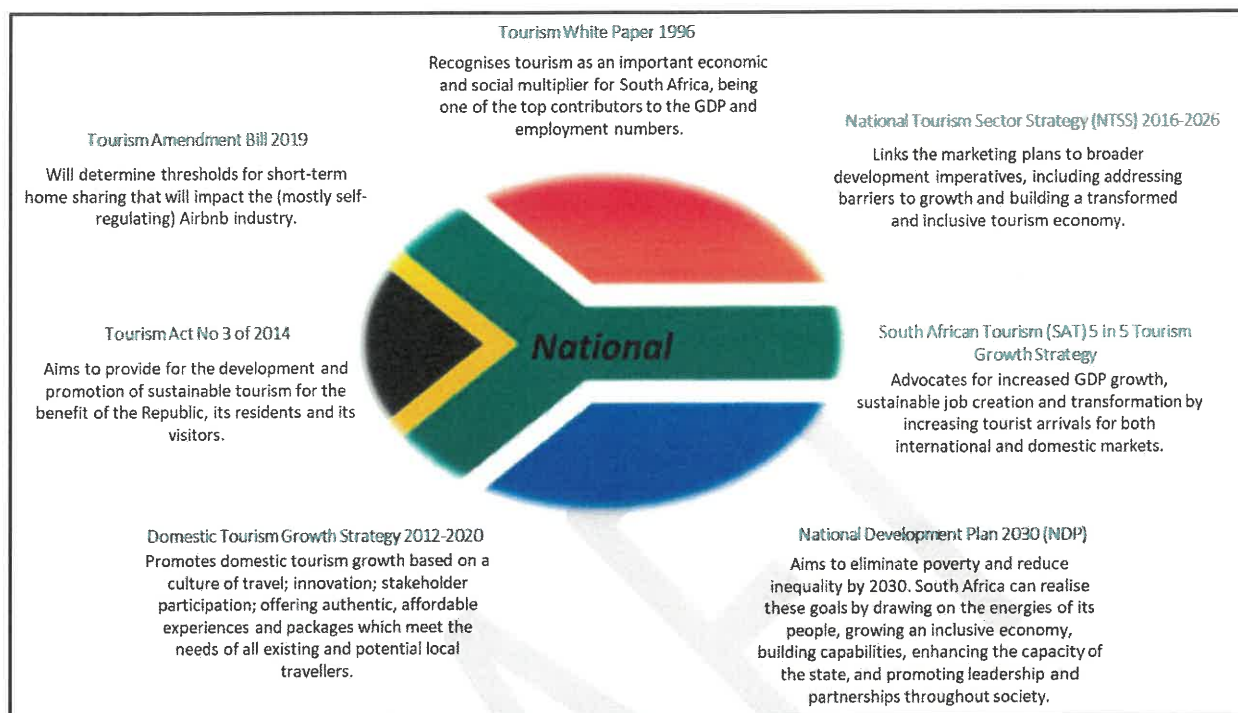
For the Theewaterskloof Tourism Strategy to achieve full integration, it must align closely with government initiatives, priorities, and perspectives. This alignment will enhance opportunities for the municipality to potentially secure additional government funding.

3.1. National Policy Review

The National Policy Review for Tourism in South Africa represents a pivotal step towards redefining the country's approach to one of its most crucial industries. This review aims to foster a strategic framework that not only promotes tourism as a driver of socio-economic development but also ensures equitable access to its benefits across all regions and demographics.

⁸ SOUTH AFRICAN GOVERNMENT, NATIONAL TREASURY ANNUAL REPORT, 2011/2012

Figure 13: National policy



The table below outlines the relevant legislation that informs tourism development on a national level.

Table 6: National policy

Policy	Description
Tourism White Paper 1996	Recognises tourism as an important economic and social multiplier for South Africa, being one of the top contributors to the GDP and employment numbers.
National Tourism Sector Strategy (NTSS) 2016-2026	Links the marketing plans to broader development imperatives, including addressing barriers to growth and the building of a transformed and inclusive tourism economy.
South African Tourism (SAT) 5 in 5 Tourism Growth Strategy	Advocates for increased GDP growth, sustainable job creation and transformation by increasing tourist arrivals for both international and domestic markets.
National Development Plan 2030 (NDP)	Aims to eliminate poverty and reduce inequality by 2030. South Africa can realise these goals by drawing on the energies of its people, growing an inclusive economy, building capabilities, enhancing the capacity of the state, and promoting leadership and partnerships throughout society.
Domestic Tourism Growth Strategy 2012-2020	Promotes domestic tourism growth based on a culture of travel; innovation; stakeholder participation; offering authentic, affordable experiences and packages which meet the needs of all existing and potential local travellers.

Policy	Description
Tourism Act No 3 of 2014	It aims to provide for the development and promotion of sustainable tourism for the benefit of the Republic, its residents and its visitors.
Tourism Amendment Bill 2019	Will determine thresholds for short-term home sharing that will have an impact on the most self-regulating Airbnb industry.

3.2. Provincial Policy Review

The acknowledgement of the provincial policies is required to ensure alignment with the tourism strategy for the Theewaterskloof municipality.

Figure 14: Provincial policy

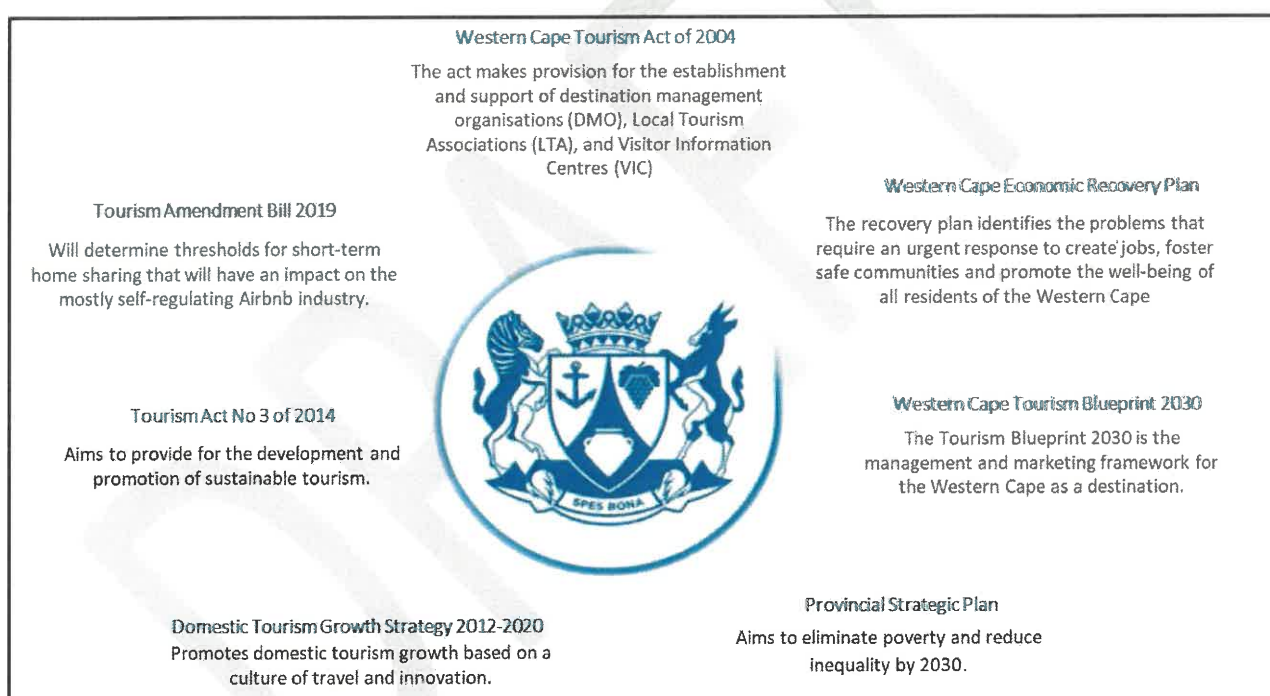


Table 7: Provincial policy

Policy	Description
Western Cape Tourism Act of 2004	The act makes provision for the establishment and support of destination management organisations (DMO), local tourism associations (LTA), and visitor information centres (VIC). These relate to their objectives, funding accreditation, and registration.

Policy	Description
Western Cape Economic Recovery Plan	The recovery plan identifies the problems that require an urgent response to create jobs, foster safe communities, and promote the wellbeing of all the residents of the Western Cape. The Provincial Strategic Plan 2019-2024 (PSP) that was launched by the Premier in March 2020 is the guiding document for the growth and development of the Western Cape.
Western Cape Tourism Blueprint 2030	The Tourism Blueprint 2030 is the management and marketing framework for the Western Cape as a destination. It aims to build a sustainable visitor economy that has a positive impact on job creation, local investment, infrastructure, and citizen pride in the province.
Provincial Strategic Plan	This strategy was developed by identifying five Vision Inspired Priorities (VIP) that measure the Western Cape's commitment to finding ways to improve the lives, livelihoods, and experiences of residents. Two of the VIPs are relevant to the tourism sector of the Western Cape. Vision Inspired Priority 1 (Safe and Cohesive Communities) and 2 (Growth and Jobs) are aimed at prioritizing tourism safety by ensuring the destination is safe and crime is mitigated, which will, in turn, contribute to the growth and development of this sector by assuring tourists abroad and locally of a safe and secure experience. The assumption is that providing a safe and secure environment for visitors can indirectly contribute to the objectives of the Department of reducing unemployment by enabling conditions for economic growth.
Western Cape Tourism Safety Strategy	By identifying the impact of crime and violence on tourists in the Western Cape, and the negative effects it has on the performance of the sector, the Western Cape introduced the Tourism Safety Strategy to bring safety and security, social development, and environmental issues all under the umbrella of Tourism safety.
Western Cape Tourism Master Plan	The plan aims to assess and review the regulatory and institutional relationships in the tourism sector ecosystem, and a proposal for a new partnering approach that strengthens the relationships within the tourism sector to improve overall system performance.
Tourism Safety Strategy	○ Tourism Safety Forum: Form a formally structured multi-stakeholder and collaborative safety forum. ○ Enforcement Task Force: Establish a multi-stakeholder enforcement task team. ○ Tourist Safety Response: Help and support to tourists in distress. ○ Tourist Safety and Security Tech Platform: Identify technologies that can help to address and solve core tourist safety risks. ○ Tourism Safety Communication Strategy: Develop a comprehensive communication strategy integrating all important stakeholders. ○ Tourism Safety Interventions & Partnerships: Identify synergies for funding on cross-platforms.

3.3. Local Policy Review

The acknowledgement of the local policies of Theewaterskloof is required to ensure alignment for the recommended tourism strategy.

Figure 15: Local policy

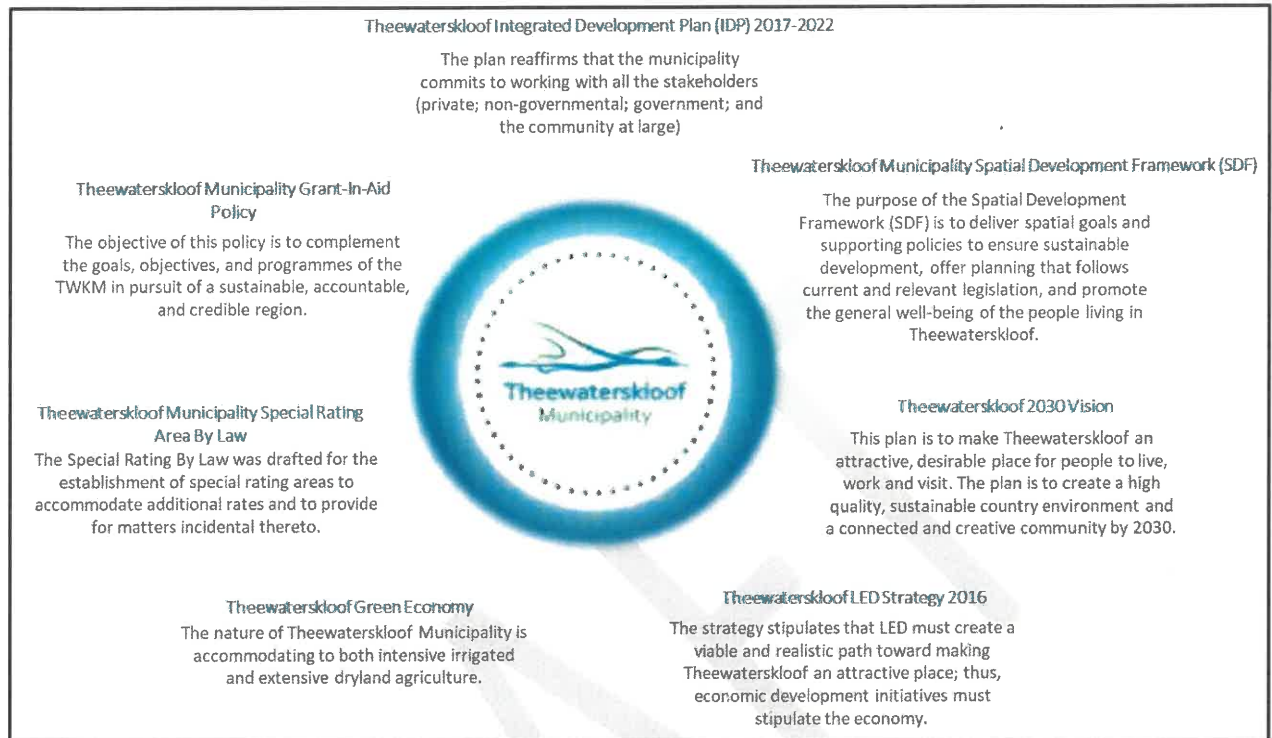


Table 8: Local policy

Policy	Description
Theewaterskloof Integrated Development Plan (IDP) 2017-2022	The plan reaffirms that the municipality commits to working with all the stakeholders (private, non-governmental, government, and the community at large). The IDP has the following key focus areas: - Financial viability – Create a sustainable future through sound financial management and continuous revenue being generated by local economic activities. - Good governance – Provide a government that is democratic and accountable to its citizens. - Institutional development – Ensure that the workforce is healthy and productive. - Local Economic Development – Improve the social fabric of the Theewaterskloof Municipality.
Theewaterskloof Municipality Spatial Development Framework (SDF)	The purpose of the Spatial Development Framework (SDF) is to deliver spatial goals and supporting policies to ensure sustainable development, offer planning that follows current and relevant legislation, and promote the general well-being of the people living in Theewaterskloof. The SDF aims to go beyond the traditional all-inclusive approach towards spatial planning by embracing holistic governance. The SDF depicts three spatial themes: Built environment – Settlement patterns, spatial structure, built heritage, transport infrastructure, housing, land use, and activity patterns.

Policy	Description
	○ Biophysical – Geology, topography, biodiversity, ecosystems, landscapes, sense of place, agriculture, land transformation and climate change ○ Socio-Economic – Regional space economy, spatial conditions, cultural heritage, tourism employment, local economy, and rural development. Implication: The Theewaterskloof SDF has three spatial themes that should be depicted in the LED Strategy: Built environment, biophysical, and socio-economic. The built environment will focus on housing, engineering infrastructure, transport, and movement systems. The biophysical theme will focus on climate, vegetation, biodiversity, water resources, agriculture and climate change. The socio-economic theme will focus on economic trends, income levels, education facilities, and health facilities.
Theewaterskloof 2030 Vision	This is a plan to make Theewaterskloof an attractive, desirable place for people to live, work and visit. The plan is to create a high-quality, sustainable country environment and a connected and creative community by 2030. The plan has five strategic thrusts: ○ Cultivate a quality living environment that meets the different settlement needs of the people. ○ Make Theewaterskloof a well-known visitor destination outside of Cape-Town for local and international tourists. ○ Become a recognised centre of learning that offers quality schooling, skills training, and higher education in targeted sectors. ○ Create a region that will be recognised for its vibrant economy and innovation which offers employment and opportunities for entrepreneurs. ○ Become a low-carbon, green region by focusing on renewable energy, sustainable resource use, and business practices. Implication: Based on the 2030 Vision, the LED Strategy will aim at creating a quality environment, increasing tourism activity, and developing the region's economy by creating a vibrant economy and innovation.
Theewaterskloof LED Strategy 2016	The strategy stipulates that LED must create a viable and realistic path toward making Theewaterskloof an attractive place; thus, economic development initiatives must stipulate the economy. The strategy is a key intervention to decrease poverty by: ○ Extending the local economic well-being in Theewaterskloof ○ Growing existing businesses ○ Encouraging new businesses to invest in Theewaterskloof ○ Supporting job creation and income generation ○ Facilitating improved levels of wealth ○ Launching the Young Entrepreneurs programme Implication: The 2016 LED Strategy will be reviewed and assessed. The key issues and challenges identified in the 2016 LED Strategy are to be tested as part of the new LED Strategy to establish their relevance and progress in addressing them.
Theewaterskloof Green Economy	The nature of Theewaterskloof Municipality is accommodating to both intensive-irrigated and extensive-dryland agriculture. It is home to the country's leading fruit industry and

Policy	Description
	several leading enterprises. Environmental resource sustainability is essential to the agriculture sector, which is the mainstay of the economy. The strategy delivers the leadership, resources, planning permissions, and legislation that enable the municipality to pursue green initiatives. The aim of the strategy is for the green economy to be recognised as something which is unavoidable and affects everyone. Implication: <i>The green economy will be prioritised, and provisions will be made for green initiatives.</i>
Theewaterskloof Municipality Special Rating Area By-Law	The Special Rating By-Law was drafted for the establishment of special rating areas to accommodate additional rates and to provide for matters incidental thereto. The municipality may determine Special Rating Areas per application following the Municipality Property Rates Act. Implication: <i>SRAs are citizen-driven means of promoting urban generation. The by-law outlines how such initiatives are to be managed and implemented in the area.</i>
Theewaterskloof Municipality Grant-In Aid Policy	The objective of this policy is to complement the goals, objectives, and programmes of the Theewaterskloof Municipality in pursuit of a sustainable, accountable, and credible region. This will be achieved by empowering and building communities and enhancing growth and sharing through partnerships. The key objective is to allow the creation of sustainable partnerships with outside agencies to achieve the objectives that are outlined in the Integrated Development Plan. It is important to note that Grant in Aid refers to the donation of municipal funds to an organisation outside any sphere of government which does not constitute a business transaction. Implication: <i>The Theewaterskloof Strategy will aim to promote the partnership of different business sectors within the municipality.</i>

4. Tourism Status Quo

This section provides insights into tourism demand and supply in the Theewaterskloof region, essential for assessing its competitiveness as a tourism destination. By reviewing key tourism statistics, it aims to identify opportunities and challenges in developing and implementing tourism initiatives in the study area.

4.1. Tourism Demand and Market Access

Tourism demand refers to the desire and willingness of individuals to travel to specific destinations for leisure, business, or other purposes. It encompasses various factors such as motivations for travel, preferences, income levels, and available leisure time. Market access, on the other hand, pertains to the ease and opportunity for tourists to reach their desired destinations. It involves considerations like transportation, infrastructure, affordability of travel options, and the overall accessibility of the destination to potential visitors. Together, tourism demand and market access play pivotal roles in shaping global travel patterns and the tourism industry's economic impact on destinations. It is important to take into consideration the following factors that have a direct impact on the demand for tourism:

- Economic conditions
- Travel costs
- Safety and security
- Natural and cultural attractions
- Demographic targets
- Technological advancements
- Environmental factors
- Political factors

4.2. South African Tourism Performance Overview

The country's tourism sector features natural beauty, diverse outdoor activities, a sunny climate, cultural richness, and a strong reputation for offering excellent value for money. It is recognised as one of the fastest-growing destinations for both leisure and business travellers worldwide.

Figure 16: South Africa's tourism performance

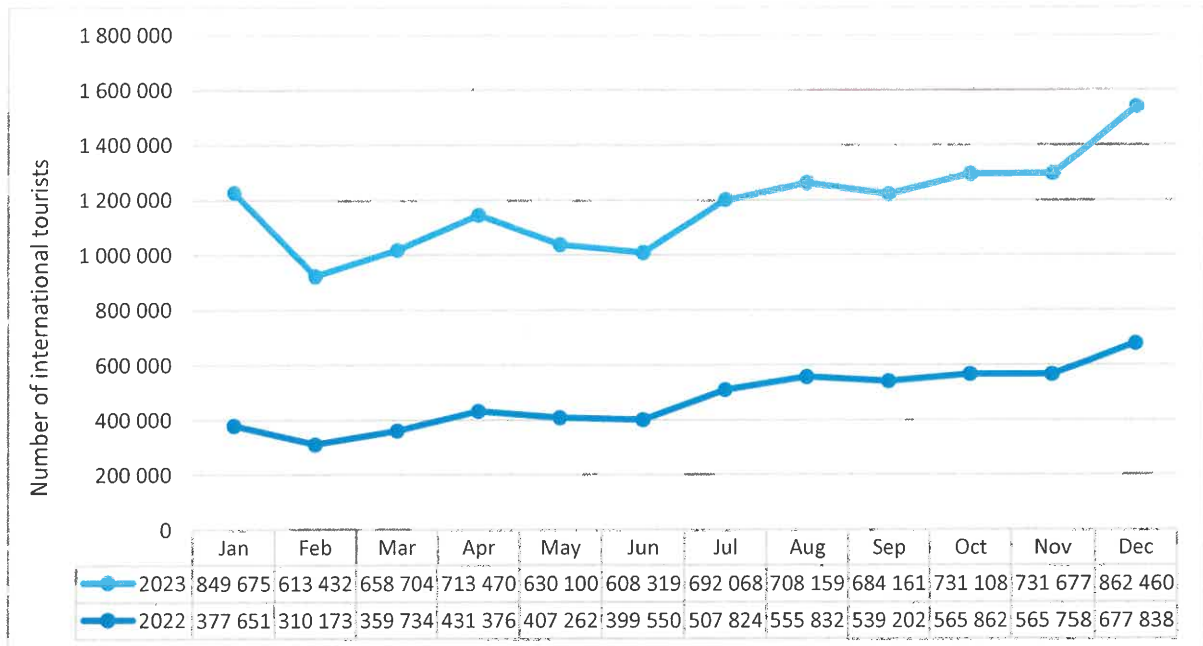


Source: SAT Annual Tourism Report 2023

South Africa's global tourism is strengthened by its distinctive attractions and year-round allure, particularly appealing to international visitors seeking sunny getaways during their winter seasons. Its rich cultural experiences, iconic landmarks, natural wonders, renowned wildlife, and safari opportunities enhance its appeal among travellers from around the world.

Below is a figure illustrating the growth in total visitor numbers in South Africa from 2022 to 2023 showing a recovery phase with visitor numbers in 2023 surpassing those of 2022.

Figure 17: Total visitor numbers, South Africa



Source: STATS SA, 2023.

The data suggests that there's a notable recovery underway from the impacts of the COVID-19 pandemic. In 2023, leisure/holiday visitor numbers recorded 84-100, reflecting an upward trend from the pandemic period. Similarly, business tourism witnessed an increase with visitor numbers climbing from 13 300 in 2019 to 13 800 in 2023 indicating a gradual return in pre-pandemic levels.

4.3.Provincial Tourism Performance Overview

The Western Cape province shines as a symbol of South Africa's varied and captivating tourism scenery, attracting visitors with its combination of natural beauty, vibrant cultural diversity, and historical depth. Known for its iconic Table Mountain setting and expansive coastal views along the Cape Peninsula, the Western Cape presents an enticing blend of city sophistication and rugged wilderness.

Figure 18: Western Cape tourism performance



Source: SAT Annual Tourism Report, 2023.

4.3.1. International Performance

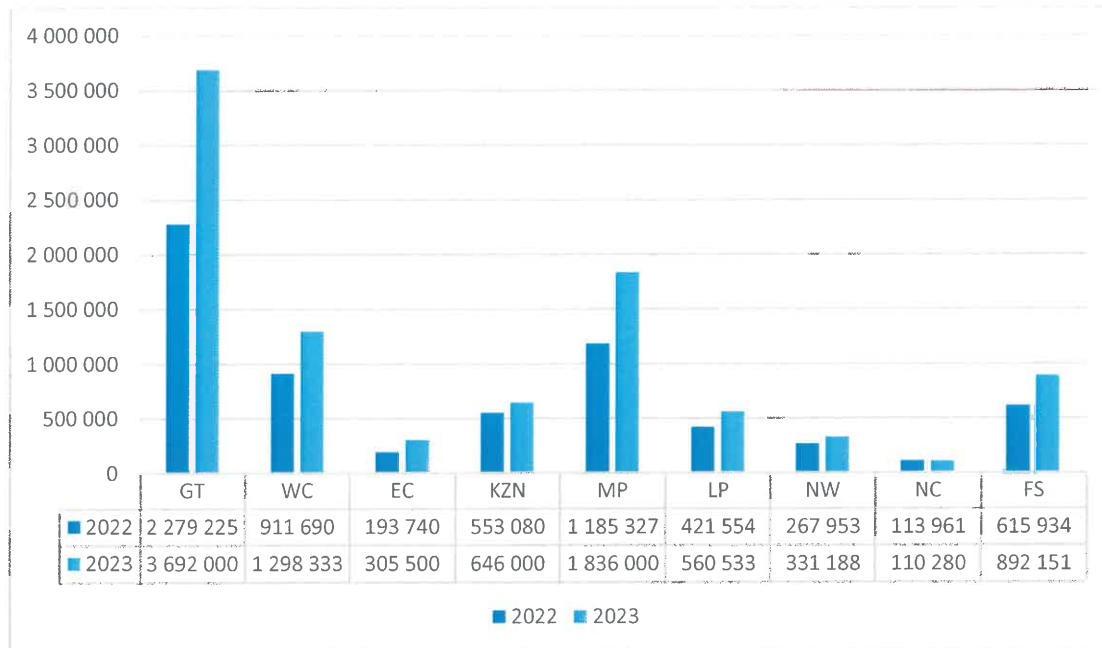
The section below outlines the international performance of the Western Cape by looking at the tourist arrivals, length of stay, paid bed nights, and expenditure.

International Arrivals

In 2023, international arrivals to the Western Cape reached 1.3 million, marking an increase from the previous year. Tourists favour the Western Cape for its globally renowned natural landscapes such as Table Mountain and the Cape Winelands. The region also offers diverse activities such as wildlife viewing, beach relaxation, and gourmet experiences appealing to a wide range of travellers.

As depicted in the figure below, Gauteng and Mpumalanga are strong contenders to the Western Cape drawing a significant number of international visitors. Gauteng, serving as Africa's economic hub, provides convenient access to South Africa's rich cultural and natural heritage. Mpumalanga is renowned for its unique attractions, including the globally renowned Kruger National Park.

Figure 19: International arrivals per province



Source: SAT Annual Tourism Report, 2023.

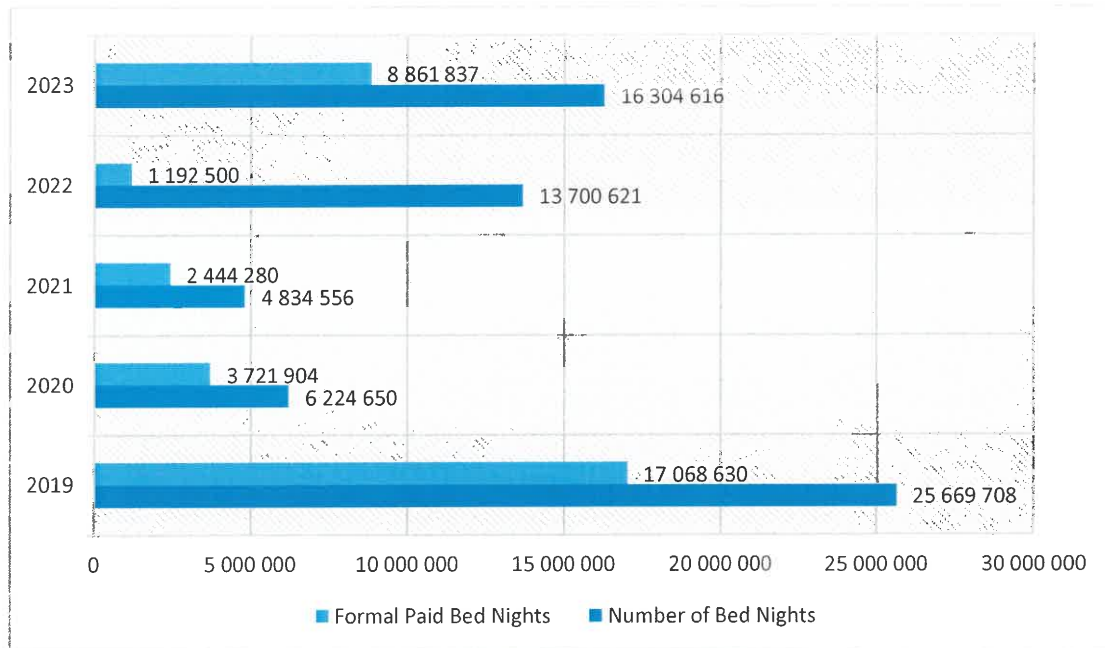
Length of Stay

In 2023, the average duration of visits in the Western Cape province dropped from 15 nights in 2022 to 13 nights. This change could indicate a shift in travel behaviour towards shorter, more frequent trips, possibly influenced by factors such as work schedules, budget constraints, or a preference for quick getaways.

Number of Bed Nights vs Formal Bed Nights

The figure below illustrates that the total number of bed nights surpassed the number of formally paid bed nights. This corresponds with the purpose of visits, suggesting that a considerable number of visitors choose to lodge with family and friends.

Figure 20: Number of bed nights vs paid bed nights

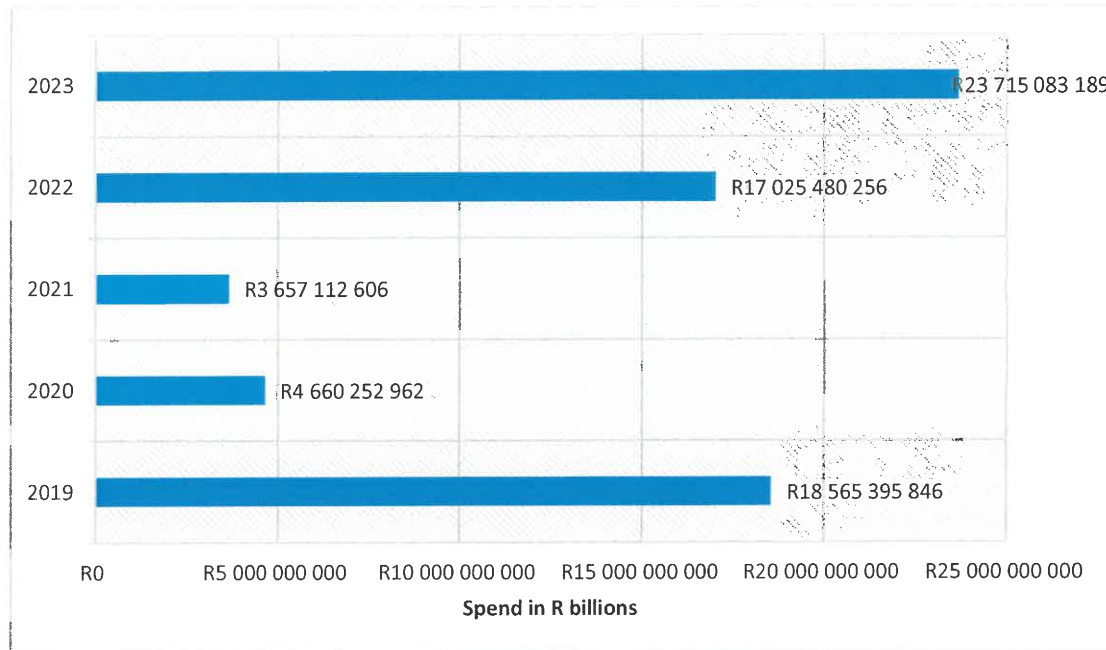


Source: SAT Annual Tourism Report, 2023.

International Tourist Spending in the Western Cape

The figure below illustrates that 2023 marked the peak year for spending in the Western Cape province, totaling R23.7 billion. This indicates visible economic recovery post-COVID-19.

Figure 21: International tourist spend in Western Cape



Source: SAT Annual Tourism Report, 2023.

Purpose of Visit for International Tourists

Visitors that visited the province for leisure or holiday purposes were the biggest with 79.5%, with just 2.4% travelling for MICE (Meetings, Incentives, Conferences, and Exhibitions) purposes. The Western Cape is a favoured destination among international travellers for leisure, largely due to its diverse attractions including natural landscapes, vibrant cultural experiences, and renowned wine regions.

Figure 22: Purpose of visit to the Western Cape

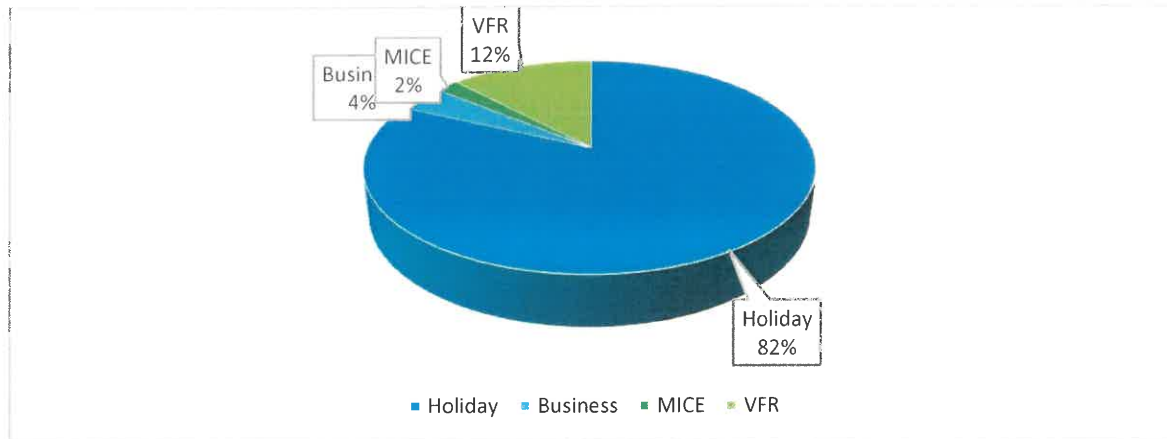


Figure 23: Good to know visitor trends



Source: SAT Annual Tourism Report, 2023.

September is the peak travel month to the Western Cape, but the marketing strategy should focus on boosting visitor numbers in November, the lowest month. Given the number of repeat visits, there is a solid tourist market for the region that warrants enhancement, especially with the number of day trips to the area.

4.4. Local Tourism Performance Overview

The following section will analyse the local tourism performance of the Theewaterskloof Local Municipality region, providing insights into its economic influence and visitor trends.

4.4.1. Overberg Visitor Trends and Patterns

The next section will look at the market trends within the tourism sector of the Overberg District that will indicate traveller preferences and industry dynamics.⁹

Figure 24: Overberg visitor trends and patterns



Age profiles of visitors

The age groups 35-50 and 51-70 years are the most popular among visitors to the Overberg District.

Mode of transport

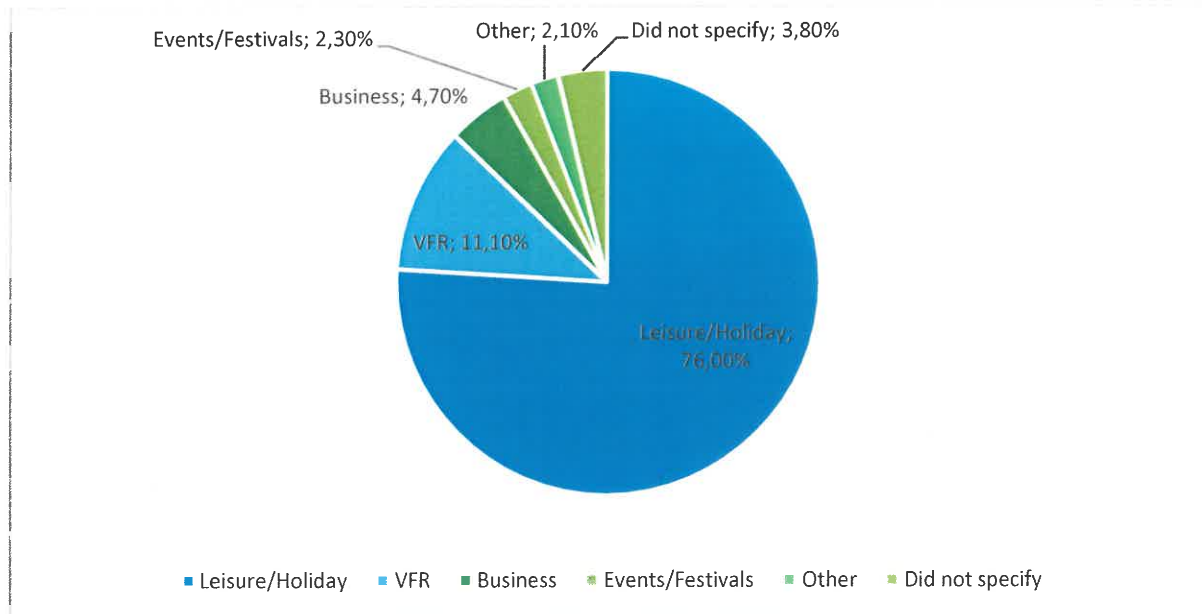
Own motor vehicles (74.4%) were the preferred mode of transport, and this is mostly due to the dominant share of Western Cape residents visiting this region while rented cars (17.2%) ranked as the second most popular form of transport.

⁹ WESGRO, OVERBERG TOURISM VISITOR TRENDS, 2022

Purpose of visit to Overberg

The biggest purpose of visiting this area is leisure/business while more than three-quarters of visitors travel to Overberg for VFR as seen in the figure below. The “other” category included sport, honeymoon/weddings, education, medical/health/wellness, and religion.

Figure 25: Purpose of visit to the Overberg District



Source: Wesgro Overberg Visitor Trends, 2022.

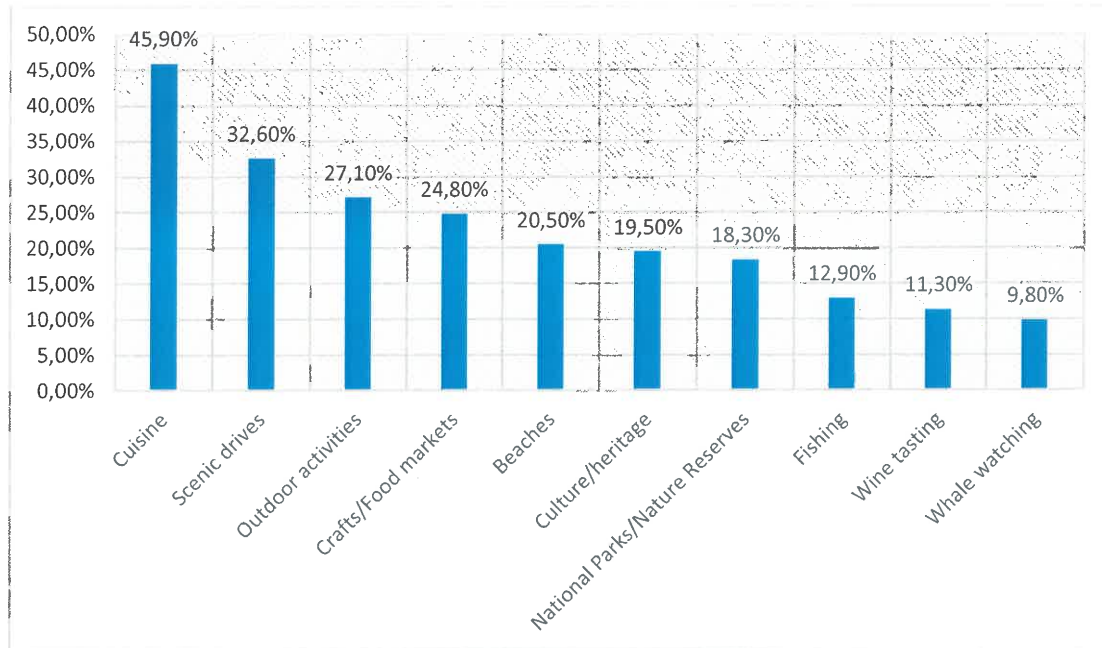
Tourist Information Sources

Visitor Information Centres (47.8%), word of mouth (28.7%), and return visits (7.5%) were the top 3 sources used by visitors to gather information about the region.

Top Activities undertaken in the Overberg District

Cuisine is ranked as the top tourist activity enjoyed in the region, followed by scenic drives, outdoor activities, and crafts/food markets:

Figure 26: Top tourist activities in the Overberg District

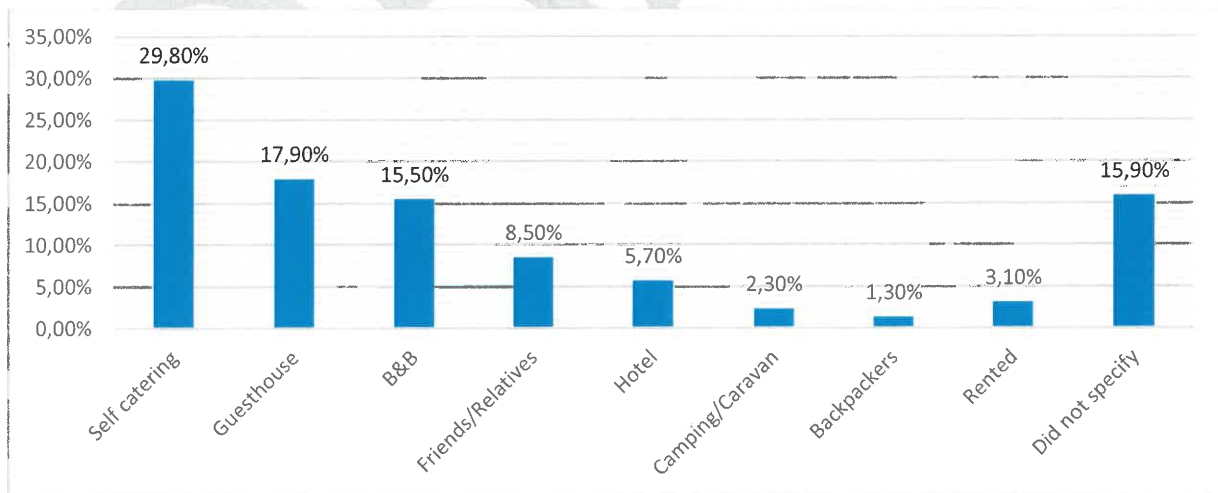


Source: Wesgro Overberg Visitor Trends, 2022.

Accommodation Usage

A total of 39% of visitors took day trips to Cape Overberg and overnight stays accounted for 61%. A third of those who indicated overnight stays spent 7+ nights and self-catering was the preferred accommodation type among overnight visitors.

Figure 27: Accommodation usage in the Overberg District



Source: Wesgro Overberg Visitor Trends, 2022.

4.4.2. Theewaterskloof Tourism Performance

The following section provides an overview of the tourism performance of Theewaterskloof Municipality in the period 2018-2022 by looking at the number of visitors, the purpose of visit, bed nights, and the origin of tourists as well as the tourism spending.

Figure 28: Theewaterskloof tourism performance



Purpose of visit

In Theewaterskloof Local Municipality Leisure / Holiday recorded the highest average annual growth rate from 2012 (42 200) to 2022 (40 500) at -0.41%. The type of tourism with the highest volume of tourists was also leisure/holiday tourism with a total number of 40 500 annual tourists and an average growth rate of -0.41%. The tourism type with the lowest growth rate was MICE tourism with an average annual growth rate of -7.49% from 2012 (4 830) to 2022 (2 220). The leisure/holiday industry at the largest share of the total tourism within Theewaterskloof Local Municipality with 57.54%. Visits to friends and relatives had the second highest share at 35.10%, followed by business tourism at 4.21% and MICE tourism with the smallest share of 3.15% of the total tourism within Theewaterskloof Local Municipality.¹⁰

¹⁰ THEEWATERSKLOOF MUNICIPALITY, STATISTICAL OVERVIEW, 2022

Origin of tourists

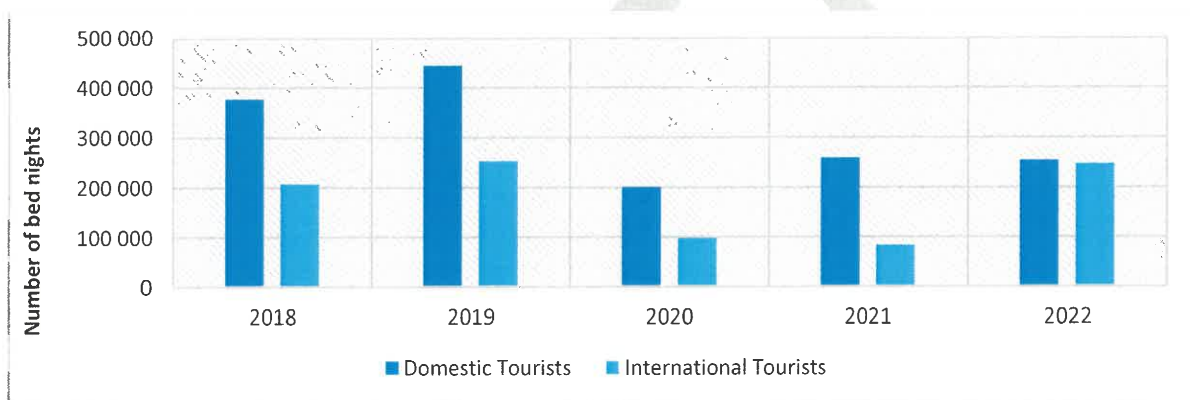
The domestic market had the largest (81.6%) of visitors recorded between January and June 2022 with the international market 18.4%. A third of international visitors to Cape Overberg came from Germany with the UK second and France third.

The largest share of the domestic market was from within the Western Cape (88.3%), confirming that the Cape Overberg is a popular tourism destination among locals. Gauteng and KwaZulu-Natal ranked as also being popular leading provinces in the region.

Bednights by the origin of tourists visiting Theewaterskloof

The figure below indicates the number of bed nights of domestic- and international tourists within Theewaterskloof Local Municipality between 2018-2022.

Figure 29: Bed nights of domestic and international tourists



Source: Theewaterskloof Statistical Overview, 2022.

Tourism Spending

In 2022, tourism spending in Theewaterskloof Local Municipality totaled R703 million, marking a 2.1% average annual growth from R571 million in 2012. Overberg District Municipality reported R5.16 billion in tourism spending for 2022, with an average annual growth rate of 7%. Across the Western Cape Province, total tourism spending rose from R40.9 billion in 2012 to R59.7 billion in 2022, growing at an average annual rate of 3.9%. Nationally, South Africa saw tourism spending increase from R230 billion in 2012 to R346 billion in 2022, reflecting an average annual growth rate of 4.2%.¹¹

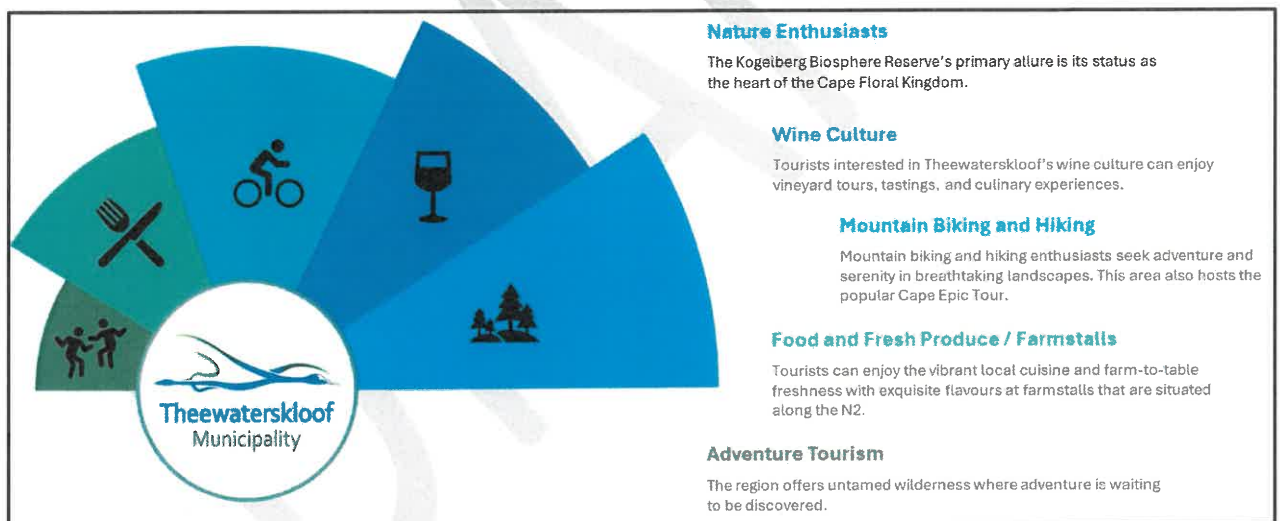
¹¹ THEEWATERSKLOOF MUNICIPALITY, STATISTICAL OVERVIEW, 2022

Tourism within the Theewaterskloof Local Municipality is experiencing growth, yet there is untapped potential for even greater expansion without adverse effects. The municipality holds promise as a highly competitive destination, while attracting a significant influx of both domestic and international visitors. To achieve this, sustained and assertive marketing efforts are necessary, targeting both emerging and established international markets while establishing effective distribution channels. Additionally, elevating service standards to world-class levels, particularly in branding and positioning is essential. The Western Cape province plays a crucial role in supporting and guiding the tourism sector, enhancing its competitiveness on regional, national and global levels.

4.5. Market Trends

The Theewaterskloof municipal area is renowned as an outstanding tourist destination, offering a diverse range of attractions and activities catering to mountain biking and hiking enthusiasts, nature lovers, and those interested in wine culture. The target markets of the Theewaterskloof municipal area are as follows:

Figure 30: Market trends



Adventure enthusiasts and thrill seekers will be delighted to know that the world's longest zip-line is expected to open in Caledon in July, weather permitting. At 3.2km, SA Forest Adventure's K3 zip-line is just under 400m longer than the



current record holder in the UAE. Caledon has been chosen as the most suitable site as it is both logistically practical and easily accessible.¹²

Upcoming zip-line implication on tourism in Theewaterskloof:

The upcoming zip-line in Caledon is expected to profoundly impact tourism in Theewaterskloof by attracting adventure enthusiasts globally. This development promises to increase visitor numbers, stimulate local businesses including accommodation industry and create new job opportunities. It also diversifies the region's tourism offerings, potentially reducing seasonality by attracting year-round visitors.

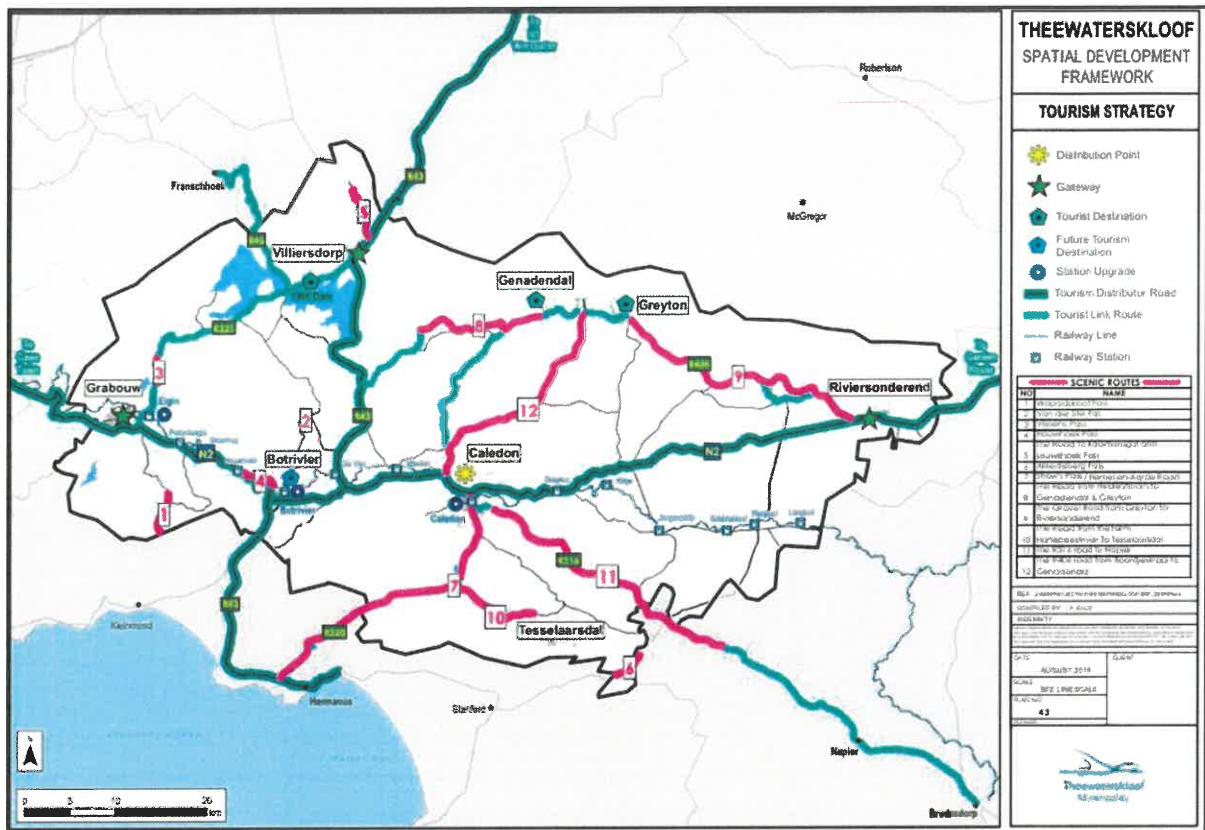
4.6. Tourism Offering and Positioning

The region attracts a distinct demographic of tourists with a keen interest in cycling, wine culture, and adventure. These visitors seek a blend of exhilarating outdoor activities and refined cultural experiences. They explore challenging mountain biking trails, while also immersing themselves in the area's renowned vineyards, indulging in wine tastings, and learning about the local wine-making process. This demographic values the potential visitor for Theewaterskloof local municipal area discover and seek out hidden treasures within the landscapes, from scenic visitors to boutique wineries, making this region an ideal destination for those seeking both adventure and cultural enrichment.

Below is a map illustrating tourist destinations, tourist routes, and prospective tourist sites within the Theewaterskloof Municipal area.

¹² DAILY TOURISM UPDATE, 2024

Map 4: Tourist offerings



Source: Theewaterskloof Local Municipality IDP, 29 May 2023.

4.6.1. Key Attractions/Activities

The next table will be a closer look at the different tourist attractions within the Theewaterskloof municipal area.

Table 9: Tourist attractions/activities within Theewaterskloof

Town	Tourist Attractions/ Activities
Botriver	- Beaumont Wine Estate is the original staging post that attracted the valley's first European Settlers as well as housing the region's oldest wine cellar and mill. - The several farm stalls (less than a 15-minute drive from each other) are renowned for the most amazing fresh produce and farm-style foods. There are also several stalls on the N2 where you can get the freshest fruit and vegetables, award-winning olive oils, local wines, and culinary delights. - Horse riding is a unique selling point of this town as it is viewed to be the best way to explore the town and surrounding areas. There are a variety of trails suitable for riders with no- or a lot of experience in horse riding.

Town	Tourist Attractions/ Activities
	○ The Botriver Hotel is a place to visit if you are interested in experiencing some of the history and hospitality of the town. It was built in 1890 which makes it a top attraction in Botriver. ○ There are a few live music spots where you can mingle with the locals while enjoying vibrant dishes that all feature locally sourced ingredients. ○ The Cornellskop Animal Farmhouses the Union Pictures film studio and has a wide range of animals, many of which are trained for film and TV production. ○ The world's best sporting landscape is the Houw Hoek Pass which provides kilometres of rolling hills and incredible views, which makes it one of the most popular places in South Africa for mountain biking, running, or hiking. ○ Adrenaline-pumping activities like abseiling and rock-climbing guided tours on quad bikes or even thrilling 4x4 adventures.
Caledon	○ Caledon Hotel, Casino & Spa is one of the top attractions in this area. Numerous restaurants provide excellent meals where you can indulge yourself and also partake in a bit of gambling. ○ Historical Hot Springs is one of the main reasons to visit Caledon. The water is a rich brown colour, but it is due to its rich iron content. ○ Zip Lining Tours allows visitors to see Caledon while gliding through the lush vegetation approximately 8m – 18m above the ground. ○ Off-road Go Karts and Quad Bikes near Caledon offer the opportunity to race along dirt roads with family and friends. ○ Air rifle and archery range on a 15m field with Olympic size targets and silhouettes will provide hours of fun. ○ Caledon is renowned for one of the best paintball fields in South Africa. ○ Caledon Museum where the legacy of Caledon can be learned. The museum is a monument of the area's past. The museum is split into two buildings depicting the two pillars of local history. The Victorian House features artifacts from between 1840 and 1900 showcasing the Victorian lifestyle in Caledon. ○ Renowned Dassiesfontein Farm Stall, which is a traditional farmstall considerate to be the heart of the Overberg's culinary delights and one of the region's top attractions as it showcases true South-African hospitality.
Genadendal / Greyton	○ The Greyton Nature Reserve is a 2,200-hectare nature reserve at the base of Riviersonderend and forms part of the Cape Folded Belt. This nature reserve is home to the Gobos River, ravines, high peaks, fynbos, and a spectacular variety of bird species. ○ Cycling and Mountain Biking in Greyton. The trails range from smooth off-road and forest trails to more extreme trails that require technical skills. ○ Greyton Saturday Morning Market is renowned in Overberg where you can find fresh produce and mouthwatering wholesome food.

Town	Tourist Attractions/ Activities
	○ Historic Village Walks of Greyton and Genadendal's is where the past comes to life. The first building still stands, while others dating back to the early 1800's still exist. On the walk, you will learn more about the history of these towns and visit some of the national monuments. ○ The Greyton Conservation Society and Greyton Municipality have worked together to mark off relaxed walking paths or hiking trails. On the route, you will see a variety of birds and experience the beauty of the fynbos. ○ The area has a list of rare bird species like the buff-spotted flufftail, African rail, and purple heron. A Genadendal resident with a passion for birds has completed a bird-guiding course and now offers a guided bird-watching experience. ○ Many art galleries visit or enjoy the art pieces in the town that are inspired by the beautiful surroundings, by strolling through the streets of these towns. ○ The beautiful scenic surroundings and open fields make the Greyton and Genadendal area perfect for horse riding ○ Many Wellness Centres include meditation, yoga, guided relaxation techniques, and reflexology.
Grabouw / Elgin	○ Wine Farms in Elgin Valley. The Elgin Valley's cool climate wines are celebrated annually at the local wine festival. To mark the end of the wine harvest, Elgin Valley hosts an annual Cool Wine and Country Festival in May in celebration of both the growing wine industry and various local businesses in the area. ○ This area is one of the most productive agricultural areas that sources fresh local cuisine. Most restaurants range from family-friendly establishments run strictly according to sustainable principles. ○ The mountainous terrain of this valley makes it one of the most popular mountain biking destinations in the country. ○ The Elgin Valley falls between the Hottentots Holland Mountain Range and the Groenland Mountains which is home to a unique variety of mountain fynbos and a natural heritage. This reserve also offers various types of outdoor activities such as mountain biking and overnight hiking trails. ○ Outdoor events such as the popular ABSA Cape Epic endurance race hosted at Elgin Valley as well as the Wine2Whales race and triathlons such as the Totalsports X-Terra event in Grabouw. Trail running is also popular in this area and the PUMA trail and Green Forest Trail Run offer challenging trails through various parts of Grabouw and the surrounding area. ○ Elgin Valley is also known for its variety of cultivated plants including roses and other fresh-cut flowers like chrysanthemum, alstroemeria, various types of lilies, sunflowers, and peonies. ○ Grabouw is known for its abundance of fresh produce, preserves, and home-baked goods sold along the N2 highway.

Town	Tourist Attractions/ Activities
Riviersonderend	○ Grabouw has a unique heritage that is influenced by the growth of agriculture in the Elgin Valley region. There are several heritage buildings in the town. ○ A variety of hiking trails to choose from, from a farmland's trail through indigenous fynbos, a historic path that overlooks the town, or one of the four trails that goes past the river. ○ Riviersonderend, an old historical golf course opened in 1949, boasts spectacular views of the Soderbergh mountain range. ○ Ou Meul Bakery is a one-stop location that is easily accessible on the N2 highway. This bakery started as a small pie shop but has transformed into a pastry empire. ○ 4x4 Trails within the forested areas with an abundance of birdlife. ○ Vn' Desden Farmstall is located directly on the main street; you can enjoy home-baked goods in addition to locally made artworks. ○ Signal Cannons overlooking the town, the historic signal system was used to call residents to military service in the area and can still be seen along the Kleinbergie Hiking Trail. During the occupation of Simons Town by the British in 1795 and in Blaauwberg in 1806, the canons were set off eight times in total as there was a threat of war. ○ Riviersonderend is renowned for its birdlife, especially the endangered Blue Crane. ○ The Dutch Reformed heritage of the town is prevalent in the construction and the design of local buildings. ○ Several kinds of outdoor festivals and concerts such as Ramfest and Vortex have been hosted on neighbouring farms, approximately 12km from Riviersonderend.
Tesselaarsdal	○ Tesselaarsdal is the ideal getaway to experience unpolluted natural beauty and a small-town community living at its best. Even though it is a long gravel road to get there it adds to the town's tucked-away charm. ○ This town offers a rare off-the-map experience to urbanites. ○ There is several hiking- and mountain biking trails to explore in this town.
Villiersdorp	○ The Theewater Sports Club was established in 1979, this sports club has become one of the largest and most popular water sports clubs in the Western Cape. It offers prime sailing conditions, power boating, jet skiing, water skiing, wakeboarding, and wind and kite surfing. ○ Hug an Alpaca is a farm with close to 50 Alpacas, the second group of this species to arrive in South Africa in 2004. Here you can see how they spin the wool to make beautiful alpaca fibre garments. ○ Kelkiewyn Farm Stall is a local farm stall and wine boutique that provides the only tasting facility for the Villiersdorp Celler. They are offering Dutch food, and they are passionate about slow-living, well-prepared food, wine, and crafting the perfect potato chip. ○ The Tractor and Engine Museum is a house of vintage models of all shapes, colours, and ages. A visit here will offer a fascinating journey through the various stages of farming machinery.

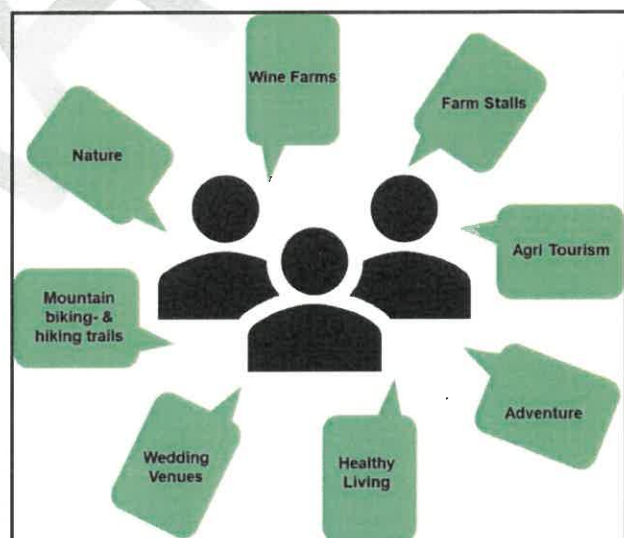
Town	Tourist Attractions/ Activities
	○ Theewaterskloof Golf Club has a 9-hole course named one of the top courses in South Africa by Golfer's Digest. ○ Aphrodisiac Shack Smokehouse. It features a world-renowned Charcuterie that crafts hot and cold smoked meat products. The smokehouse was built using traditional methods. ○ Painting courses at the Elliott Gallery. A creative haven that consists of art pieces inspired by nature. ○ Elandskloof Scenic Drive. The road connects the fertile Elandskloof fruit farms with the town and offers breath-taking views of the northerly surrounding vineyards and orchards. This drive is rewarding all year round. ○ Villiersdorp Winelands Mountain Bike Ride. Cycle on farm roads through vines and apple orchards, and over river crossings while witnessing the abundance of bird life on this beautiful trail that forms part of the Cape Epic. ○ Kroonland 4x4 Route has a 13km route that can take up to 3 hours.¹³

4.6.2. Destination Positioning

To truly stand out as a destination it is important to know what sets your destination apart from others. Defining an area is known as destination positioning and is essential for building an effective tourism marketing strategy. It is important to start by clearly defining your target audience by identifying the unique selling points for Theewaterskloof. During the tourism stakeholder engagement sessions, participants identified some key selling points for the Theewaterskloof municipal area and depicted them in the infographic.

It is important to look at the competitive advantages and disadvantages of tourism products in the area in comparison with other tourist destinations in the Western Cape. Understanding these factors helps in assessing the appeal and viability of the local offerings. By analysing the unique selling points alongside the challenges faced, strategies can be devised to capitalise on strengths and mitigate weaknesses.

This comprehensive evaluation informs decision-making processes, enabling the development of sustainable tourism practices that not only attract visitors but also contribute positively to the local economy and environment.



¹³ XPLORIO, THEEWATERSKLOOF TOP ATTRACTIONS, 2024

Table 10: Competitive advantages vs disadvantages

Offering	Competitive Advantages	Disadvantages
Wine Tourism 	Numerous wine farms in the Elgin Valley offer both wine-tasting and mountain biking trails, appealing to two distinct types of tourists: those interested in wine culture and adventurous travellers.¹⁴	Franschhoek stands out as a formidable competitor in wine tourism due to its significant wine industry and the allure of experiencing some of South Africa's finest wines. With its extensive array of vineyards, many visitors keen on wine culture prefer to visit Franschhoek for this exceptional experience.
Adventure Tourism 	Theewaterskloof boasts an array of adventure tourism opportunities, featuring abundant mountain biking and hiking trails for enthusiasts to explore. Caledon is soon to be home to the world's largest zip-line which will enhance the tourism offerings in the TWKM area by strategically marketing itself as a complementary destination for adventure seekers. This will differentiate Theewaterskloof from other areas but also enhances its appeal to tourists seeking diverse and memorable experiences.	What sets Franschhoek apart competitively, is their provision of guided kick scooter tours, catering to both families seeking leisurely exploration and more adventurous individuals keen to discover the town and its surroundings, which is a competitive advantage against Theewaterskloof.
Country Culture (could include art) 	Theewaterskloof boasts cultural attractions such as the Caledon Museum and the sole bike museum in the Southern Hemisphere. Additionally, numerous farm stalls offer fresh local produce, while a casino in Caledon provides further entertainment options.	Franschhoek also has a strong country culture which makes it a strong competitor for Theewaterskloof municipal area.
Weddings 	The growing wedding industry in the Theewaterskloof area enhances the tourism sector by capitalizing on unique geographical features, cultural heritage, and specialised services that attract couples seeking distinctive and memorable experiences.	Failure to combine tourism packages or involve various stakeholders in the wedding industry can limit the overall appeal of the area to tourists, resulting in missed opportunities for economic growth and diversity.

¹⁴ ELGIN GRABOUW, A WINERY FOR EVERY OCCASION, 2020

Offering	Competitive Advantages	Disadvantages
Water sport 	The Theewaterskloof municipal area is home to the Theewaterskloof Dam, along with the distinctive Eikenhof Dam. Notably, the Eikenhof Dam stands out as the only dam featuring a 2km straight line, ideal for hosting canoe racing competitions.	Underdeveloped state-owned land in South Africa limits socio-economic progress and hinders the well-being of local communities.
Fynbos and Natural Areas 	Theewaterskloof has many natural areas like the Wildflower Garden as well as the Kogelberg Biosphere which attracts nature enthusiasts.	Franschhoek does not offer that much to visitors who are interested in nature.
Apple industry 	The Grabouw/Elgin Valley in Theewaterskloof gains significant advantages from its robust apple industry. It creates local expertise in apple cultivation and enhances the region's brand identity. This can attract tourists, especially if there are related events like apples festivals or farm tours and drives agricultural innovation.	The Citrus Festival at Boschendal, near Franschhoek, could overshadow Theewaterskloof's apple industry by drawing attention and visitors away, making it harder for the area to establish its own apple festival and gain recognition.

The survey results are included as Annexure A at the end of this report. This annex provides detailed insights and data that support the findings and recommendations presented throughout the document.

4.7.SWOT Analysis

The below SWOT analysis provides a snapshot of the current tourism situation in Theewaterskloof region, highlighting areas of strength, areas needing improvement, potential avenues for growth, and external threats that could impact tourism development in the area.

Figure 31: SWOT analysis

Strengths	Weaknesses	Opportunities	Threats
○ Natural Attractions: Abundance of natural beauty including mountains, Theewaterskloof Dam, scenic landscapes, wine farms, and apple farms ○ Cultural Heritage: Rich cultural history ○ Outdoor Activities: Hiking, mountain biking, water sports and eco-tourism ○ Proximity to Cape Town: Close to Cape Town, a major international tourist destination ○ Infrastructure: Towns are clean, general good infrastructure S	○ Infrastructure: Limited signage ○ Seasonality: Dependency on seasonal tourism, particularly in winter months ○ Marketing and Promotion: Insufficient marketing efforts to promote Theewaterskloof as a distinct tourist destination ○ Skills and Training: Need for training in tourism-related skills ○ Diversification: Reliance on limited types of tourism experiences, potentially limiting appeal to diverse tourist demographics W	○ Tourism Development: Potential for infrastructure development to support tourism (signage) ○ Events and Festivals: Hosting events and festivals to attract tourists throughout the year ○ Culinary Tourism: Promoting local cuisine and culinary experiences (wine farms, farm stalls, and apple farms) ○ Sustainable Tourism: Growing demand for eco-friendly and sustainable tourism experiences ○ Collaboration: Collaborating with neighbouring regions and municipalities to create regional tourism packages O	○ Competition: Competition from nearby tourist destinations within the Western Cape (Franschhoek wine route) ○ Safety and Security: Potential safety concerns on tourism outdoor routes ○ Economic Factors: The economy affects income for travel, and lack of financial support ○ Restrictions and Red Tape for Applications: Limiting opportunities to host events that could attract tourists and enhance local tourism ○ Underutilized Resources: Insufficient development of lesser-known attractions and experiences T

By promoting sustainable tourism practices, developing community-based tourism, and improving signage; Grabouw, Caledon, Greyton, Genadendal, Riviersonderend, Botrivier, Tesselaarsdal and Villiersdorp can build on their strengths and opportunities and overcome their weaknesses and threats.

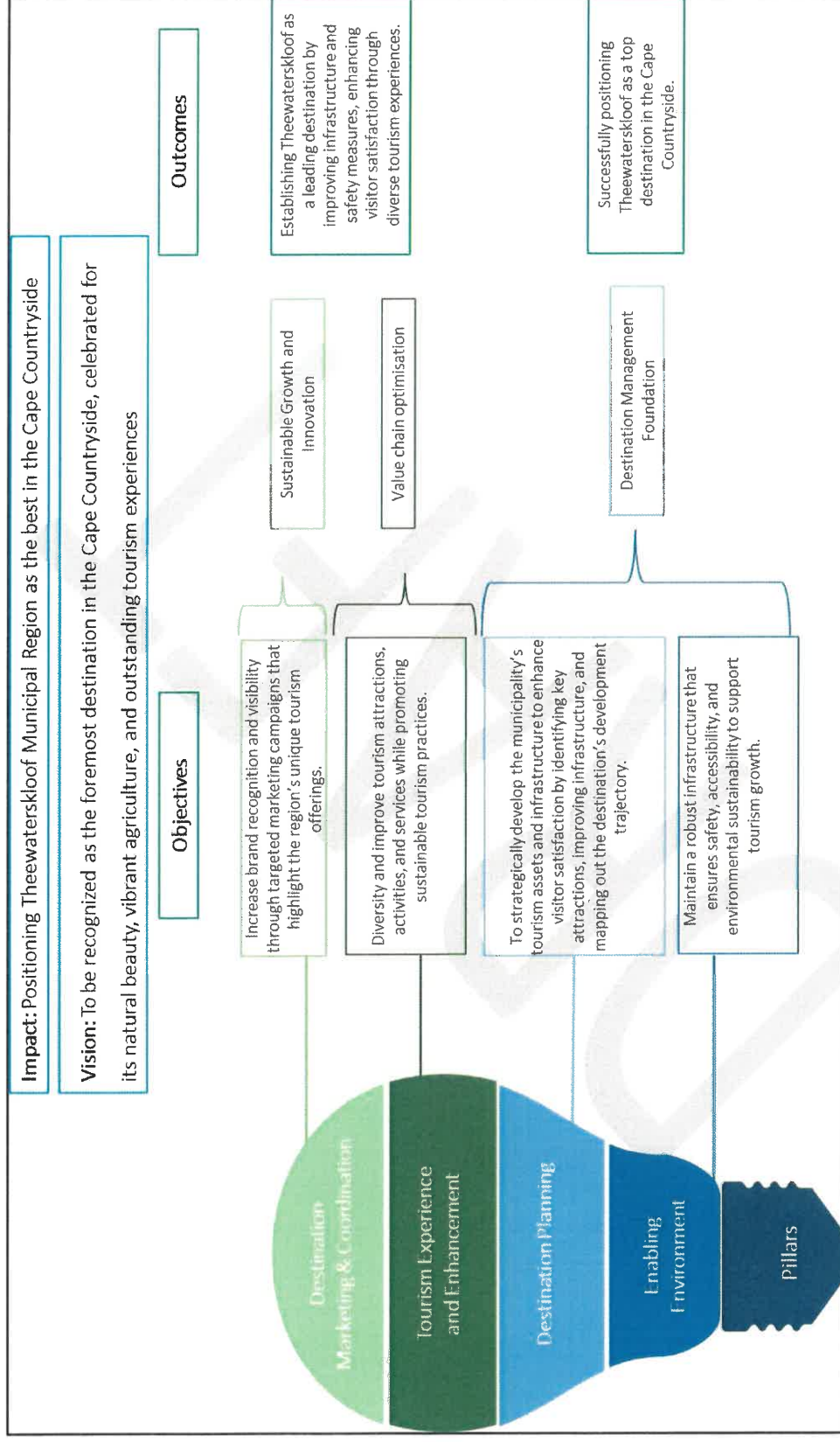
5. Strategic Framework and Direction

The goal of the tourism strategy is to enhance the effectiveness of the Local Economic Development Strategy by giving priority to the tourism sector through a well-coordinated planning approach. This ensures that the requirements of the tourism industry are included in the Integrated Development Plan (IDP). The existing strategic framework sets out initial goals with intentions for future expansion. It concentrates on bolstering and enriching the tourism sector within Theewaterskloof Municipality to enhance tourism through the outlined strategic framework. The LED of Theewaterskloof Local Municipality did acknowledge tourism as a priority for the area.

To enhance the aesthetic appeal of the Theewaterskloof area and attract more tourists, efforts are underway to market its picturesque landscapes and rich agricultural heritage. Emphasis is placed on developing sustainable tourism practices that promote cultural and environmental awareness while minimizing ecological impact. These initiatives aim not only to create employment opportunities for locals but also to maximize the economic, social, and environmental benefits of tourism. Additionally, there's a concerted effort to attract business tourism and events to the region, further bolstering its appeal as a multifaceted destination.

The following section unpacks the strategic framework for tourism development in Theewaterskloof. It relays the strategic vision, objectives and outcomes, and addresses the key development pillars.

Figure 32: Strategic framework



5.1.Vision

The vision sets a clear pathway for industry stakeholders to understand the significance and objectives of current and future tourism roles by illustrating how tourism influences economic advancements and regional welfare. It provides direction and clarity by guiding the tourism development process, establishing priorities, and inspiring sectoral expansion. Theewaterskloof aims to boost the local economy by leveraging its heritage, natural environment, and infrastructure assets to unlock potential for inclusive growth in a multisectoral environment. The Local Economic Development Strategy highlights the tourism sector as a crucial opportunity for fostering an inclusive economy.

“To be recognised as the foremost destination in the Cape Countryside, celebrated for its natural beauty, vibrant agriculture, and outstanding tourism experience.”

To realise the tourism vision for Theewaterskloof, effective collaboration between the municipality and the tourism sector is essential. This partnership aims to elevate Theewaterskloof as a leading destination in the Cape Countryside while prioritising municipal planning and service delivery aligned with sector needs. The proposed objectives for Theewaterskloof Municipality outline actionable steps necessary to achieve the outcomes:

- Maintain a robust infrastructure that ensures safety, accessibility, and environmental sustainability to support tourism growth.
- To strategically develop the municipality’s tourism assets and infrastructure to enhance visitor satisfaction by identifying key attractions, improving infrastructure, and mapping out the destination’s development trajectory.
- Diversify and improve tourism attractions, activities, and services while promoting sustainable tourism practices.
- Increase brand recognition and visibility through targeted marketing campaigns that highlight the region’s unique tourism offerings.

5.2.Objectives

The following objectives guide the development and success of the tourism strategy.

Table 11: Strategic objectives

Objective	Description
Maintain a robust infrastructure that ensures safety, accessibility, and environmental	This objective focuses on the continuous upkeep and enhancement of essential infrastructure in Theewaterskloof to facilitate tourism development. It includes maintaining and improving roads, utilities, accommodations, and public facilities to ensure the safety and convenience of visitors. Additionally, emphasis is placed on

Objective	Description
sustainability to support tourism growth.	implementing sustainable practices that minimize environmental impact, preserving the natural beauty and resources that attract tourists to the region. By prioritising these efforts, the objective aims to create a supportive environment for sustainable tourism growth while enhancing the overall visitor experience and maintaining the region's ecological integrity.
To strategically develop the municipality's tourism assets and infrastructure to enhance visitor satisfaction by improving infrastructure and mapping out the destination's development trajectory.	This objective is to strategically plan and develop the municipality's tourism assets and infrastructure to enhance visitor satisfaction. This involves identifying key attractions, improving infrastructure, and mapping out the development trajectory of the destination. By strategically enhancing the tourism offerings, the aim is to provide enriching experiences for visitors while preserving the cultural and natural heritage of Theewaterskloof. Through sustainable tourism practices, economic growth will be stimulated while creating job opportunities, and foster community development. This approach not only aims to attract tourists but also ensures the long-term sustainability of the destination.
Diversify and improve tourism attractions, activities, and services while promoting sustainable tourism practices.	This objective centres on expanding and enhancing the range of tourism offerings in Theewaterskloof to cater to diverse visitor interests and preferences. It involves diversifying attractions, activities, and services to create a richer and more engaging visitor experience. The objective emphasises the adoption of sustainable tourism practices aimed at minimising environmental impact and preserving the area's natural and cultural heritage. By implementing these improvements, the goal is to attract a broader audience of tourists while ensuring the long-term sustainability of tourism in Theewaterskloof.
Increase brand recognition and visibility through targeted marketing campaigns that highlight the region's unique tourism offerings.	The objective aims to elevate the profile of Theewaterskloof through strategic marketing efforts. By implementing targeted campaigns, the goal is to enhance awareness of the region's distinctive tourism attractions, activities, and cultural heritage. These initiatives will focus on communicating Theewaterskloof's unique selling points to potential visitors, thereby increasing brand recognition and visibility in the tourism market. Through effective storytelling and promotional activities, the objective seeks to position Theewaterskloof as a compelling destination choice known for its scenic landscapes, rich cultural experiences, and diverse recreational opportunities.

6. Tourism Development Pillars

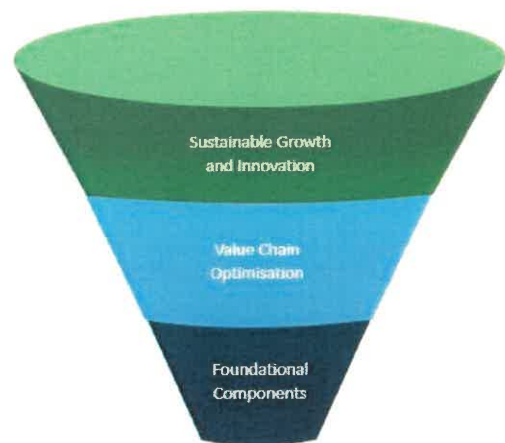
The strategy aims to align closely with the strategic pillars of the NTSS, emphasising the utilization of Theewaterskloof's unique destination assets, such as its rich natural landscapes and diverse cultural heritage. These assets are not only sources of national pride but also serve as powerful drivers for economic growth within the tourism sector.

By prioritising these unique assets, the strategy seeks to attract both domestic and international visitors by positioning Theewaterskloof as the best destination in the Cape Countryside, thereby stimulating economic activity through increased tourism spending, job creation, and the development of local communities. Moreover, leveraging these assets ensures sustainable tourism practices that preserve the environment and cultural integrity.

By establishing foundational components such as strategic direction and a clear vision, Theewaterskloof ensures that high-quality experiences are prioritised across accommodation, transportation, guided tours and entertainment. Through value chain optimisation, the focus is on refining and enhancing each element of the visitor experience. Finally, with a focus on sustainable growth and innovation Theewaterskloof aims to continuously improve and adapt, fostering a reputation for excellence, encouraging positive word-of-mouth and driving repeat visits.

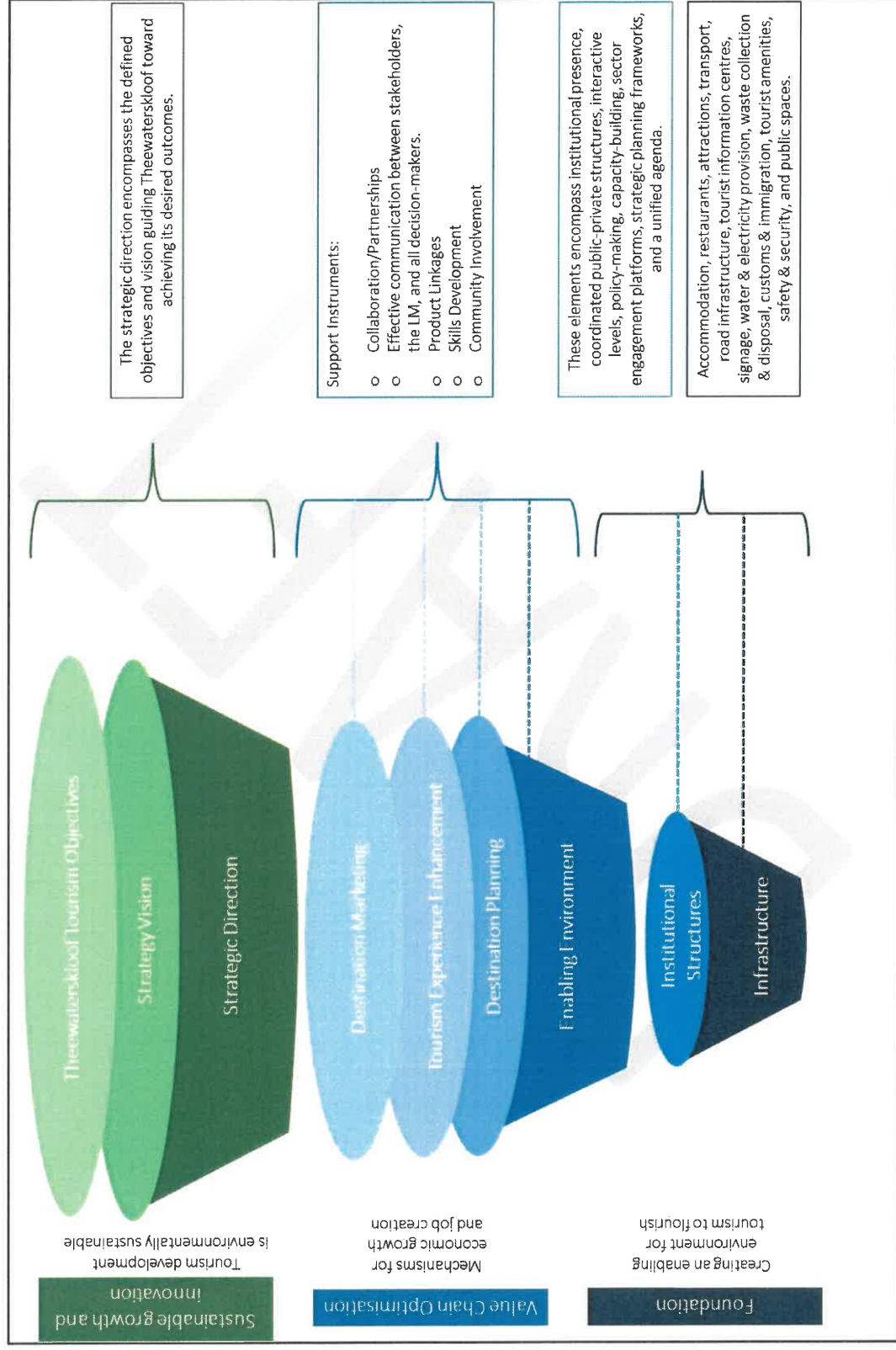
In the context of a tourism strategy for Theewaterskloof Local Municipality, the value chain elements should be sequenced as follows to build a sustainable and competitive destination. The foundation begins with establishing an enabling environment, which includes infrastructure, policies, and safety measures crucial for tourism development. Once in place, destination planning strategically identifies attractions and cultural sites, emphasising sustainable development. Following this, enhancing tourism experiences through improved activities, accommodations, and services aims to extend visitor stays and satisfaction. Lastly, effective destination marketing utilizes digital platforms and collaborations to raise awareness and attract diverse tourist segments, ensuring economic benefits and community growth.

By following the sequence – starting with creating an enabling environment, followed by destination planning, enhancing tourism experiences, and then marketing the destination, the Theewaterskloof municipality can build a sustainable and competitive tourism strategy that attracts visitors while benefiting the local community and economy.



Essentially, the strategy underscores the dual importance of leveraging unique assets and delivering exceptional visitor experience. By aligning with the foundational components, value chain optimisation, and service excellence by integrating them into operational plans, stakeholders can effectively drive economic growth while promoting Theewaterskloof as the foremost destination in the Cape Countryside.

Figure 33: Tourism development pillars



The following section provide recommended actions to be considered by the municipality to prioritise tourism within its planning and development processes.

6.1. Enabling Environment

An enabling environment is crucial for formulating a strategic direction in tourism because it provides the necessary framework and support systems that foster sustainable development and growth. Clear and stable policies, robust infrastructure, skillset, effective marketing efforts and a commitment to sustainability all contribute to creating attractive destinations.

Creating an enabling environment for the tourism sector involves developing infrastructure including transportation and utilities by establishing clear regulatory frameworks that balance tourism growth with environmental and cultural preservation to ensure safety and security for tourists, providing diverse tourism services and facilities with high standards of quality and professionalism, preserving cultural and natural heritage, implementing effective marketing strategies, engaging local communities in tourism planning, supporting financial and investment opportunities, promoting environmental sustainability, and continuously monitoring and evaluating impacts to improve tourism practices and visitor experience.

The following are recommended actions to be considered for an enabling environment.

Table 12: Enabling environment recommended actions

Output	Recommended Action	Responsibility
Infrastructure Development and Maintenance	Road safety enhancements: Address the hazardous crossing at the three entrances to Grabouw along the N2. Implement traffic circles to enhance safety for pedestrians and vehicles.	TWKM, Department of Transport, LED
	Regular maintenance: Ensure well-maintained entrances, particularly near the taxi rank, to create a welcoming appearance for tourists.	
Safety and Security Measures	Establish safety protocols at tourist facilities to provide a secure environment for visitors, addressing the lack of law enforcement.	TWKM, Tourism Representative, Local Law Enforcement Agencies, Tourism Stakeholders
Environmental Sustainability Initiatives	Promote sustainable practices among tourism operators and local communities for environmental conservation and responsible tourism.	TWKM, LTAs/LTOs, Environmental Agencies
Accessibility	Ensure that all infrastructure facilities are accessible to visitors, including those with disabilities.	TWKM, Infrastructure Development Teams
Public Awareness and Education	Training programs: Provide training for stakeholders focused on safety,	

Output	Recommended Action	Responsibility
	environmental conservation, and accessibility. Sustainable tourism education: Educate tourists and local communities about sustainable practices.	TWKM, Tourism Representatives, Community Leaders, LTOs
Municipal Commitment and Partnerships	Tourism development commitment: Clearly outline the municipality's commitments to tourism development Partnership development: Foster collaboration with district authorities and local stakeholders.	TWKM, District, Local Stakeholders, Tourism Working Group
Stakeholder Engagement and Feedback	Conduct regular stakeholder engagements to gather feedback and build relationships with local communities and businesses.	Tourism Working Group, Local Stakeholders

6.2. Destination Planning

Destination Planning plays a crucial role in shaping the success and sustainability of tourism in any area. By strategically outlining goals, infrastructure development, and visitor experiences, destination planning ensures that an area can effectively cater to the needs and desires of tourists while preserving its natural and cultural assets. This proactive approach not only enhances the overall visitor experience but also fosters economic growth, community development, and environmental conservation. Effective destination planning serves as a roadmap for stakeholders to collaborate, innovate, and create memorable experiences that attract and retain tourists thereby positioning the area competitively in the global tourism market.

When planning a tourism destination, it is crucial to consider unique attractions and activities, adequate infrastructure including transport and accommodation, accessibility, safety measures, and cultural and environmental preservation. Understanding seasonal variations, involving the local community, complying with regulations, and promoting the destination effectively is also key. Sustainable practices should be prioritised to minimise environmental impact and maximise economic benefits for local communities, ensuring a positive visitor experience while safeguarding the destination's long-term appeal and integrity.

The following are recommended actions to be considered for tourism experience enhancement.

Table 13: Destination planning recommended actions

Output	Recommended Action	Responsibility
Identify Key Attractions	Analyse visitor preferences and market trends to prioritise attractions	TWKM, Tourism Representative, DWS
	Further develop Theewaterskloof Dam as a major asset, including accommodation facilities.	
Brand Development	Redevelop the tourism brand for TWK to reflect unique strengths and engage the private sector for collaboration	Tourism Working Group, Local Businesses, SMMEs
Internal Audits and Incentive Policies	Develop a comprehensive database of local tourism assets and support data-driven decision-making for effective tourism strategies.	TWKM, District, Tourism Working Group
Tourism Working Group Formation	Establish a tourism working group with representatives from the hospitality sector to ensure coordinated efforts	Tourism Working Group, TWKM, Local Stakeholders

6.3. Tourism Experience Enhancement

Enhancing the tourism experience within a region is crucial for driving economic prosperity, fostering cultural exchange, and promoting sustainable development. A well-crafted tourism offer not only attracts visitors but also encourages them to extend their stay, increase their spending, and return, thereby stimulating local businesses and creating job opportunities. Furthermore, it serves as a platform for showcasing distinctive cultural heritage, natural beauty, and historical significance, safeguarding these assets for future generations. By prioritising the improvement and diversification of tourist experiences, destinations can set themselves apart in a competitive global landscape ensuring enduring prosperity and vitality for the local community.

Enhancing the tourism experience involves several key considerations to ensure visitors have a fulfilling stay. Firstly, it's important to make travel and exploration easy with good infrastructure and transportation options. Secondly, preserving the authenticity of local culture and traditions adds value to the experience. Technology can also play a role in offering interactive guides and immersive experiences. Lastly, sustainability is crucial for minimising environmental impact and supporting local communities economically. By focusing on these aspects, destinations can create memorable and responsible tourism experiences for everyone involved.

The following are recommended actions to be considered for tourism experience enhancement.

Table 14: Recommended actions for tourism experience enhancement

Output	Recommended Action	Responsibility
Diversify Tourism Products and Services	Identify new tourism products that highlight the area's cultural, natural, and historical richness, and promote guided tours for a cohesive experience.	LTAs/LTOs, Tourism Representative, Local Community Members
Promote Sustainable Tourism Practices	Implement sustainable tourism programs for operators and educate communities on sustainable behaviours.	LTAs/LTOs, Environmental NGOs, Tourism Representative
Cultural and Heritage Preservation	Preserve cultural heritage sites through interpretation programs and support local arts and crafts initiatives.	LTAs/LTOs, Cultural Community Leaders
Enhance Tourism Experiences	Enhance experiences through guided tours and storytelling sessions.	LTAs/LTOs, Cultural Community Leaders, Tour Operators
	Integrate technology for immersive experiences.	
	Provide shuttle services for convenient transportation to attractions.	
Explore Diverse Offerings	Enhance tourism by exploring cultural offerings, adventure activities, and agritourism tailored to visitor interests	Tourism Working Group, Stakeholders, Tour Operators, TWKM
Signage Improvements	Improve tourism signage with streamlined approval processes and develop welcoming signs at key traffic points, particularly on the N2.	TWKM, Town Planning, SANRAL

6.4. Destination Marketing and Coordination

Destination marketing in tourism involves strategically promoting an area to attract visitors by highlighting its unique attractions, cultural experiences, and natural beauty through advertising, social media, and collaborations. Simultaneously, destination coordination aligns efforts among stakeholders, local municipalities and tourism boards to optimise infrastructure, services and visitor experiences. This collaborative approach aims to enhance the destination's appeal, increase tourism revenue, and ensure sustainable development thereby bolstering its competitiveness in the tourism market.

Theewaterskloof combines rich cultural heritage with stunning natural landscapes that attract travellers seeking an enriching experience. The area is renowned for its vibrant wedding industry that is complemented by wine farms and apple orchards that are integral to its unique appeal and should be highlighted in its marketing strategy. During stakeholder engagement sessions it was acknowledged that expertise in promoting the region through professional marketing services is important and it will free the municipality from this responsibility by outsourcing it. To effectively advance development and promotion a structured approach is necessary. This includes appointing a dedicated tourism officer to lead initiatives and establishing a specialised marketing entity to enhance the region's appeal. The roles of Local Tourism Associations/Organisations (LTA/LTO) and Regional Tourism Organisations (RTOs) are pivotal in ensuring

the successful execution of this marketing strategy. LTAs provide foundational support that offers members essential services and advocates for their interests in the inbound tourism sector.

The following are recommended actions to be considered for destination marketing and coordination.

Table 15: Destination marketing & coordination recommendations

Output	Recommended Action	Responsibility
Marketing Collateral	Design promotional materials showcasing unique offerings.	LTAs/LTOs, Stakeholders, Tourism Working Group
	Utilize the digital billboard at the Elgin Market.	
	Create engaging content for social media and develop a dedicated tourism website.	
Partnerships and Collaborations	Forge partnerships with local businesses and collaborate with influencers to promote the region.	LTAs/LTOs, TWKM, Tourism Working Group
Community Engagement and Events	Organise local events and involve the community in tourism initiatives, encouraging locals to share positive experiences.	TWKM, LTAs/LTOs, Tourism Working Group
Utilise Existing Resources	Leverage existing resources, and make use of the MERO report in terms of market trends, visitor numbers etc.	Tourism Working Group, Stakeholders, SMMEs
Regular Communication	Foster communication between local, district, provincial, and national levels to align strategies and initiatives.	Tourism Working Group, LM, DM, National Department of Tourism, LED
Physical Workshops	Arrange workshops to engage communities and stakeholders, facilitating discussions on tourism development.	Tourism Working Group, TWKM

7. Institutional Environment

Studying municipal roles in tourism provides insight into how local governments can build and upkeep tourist infrastructure while overseeing attractions in the region.

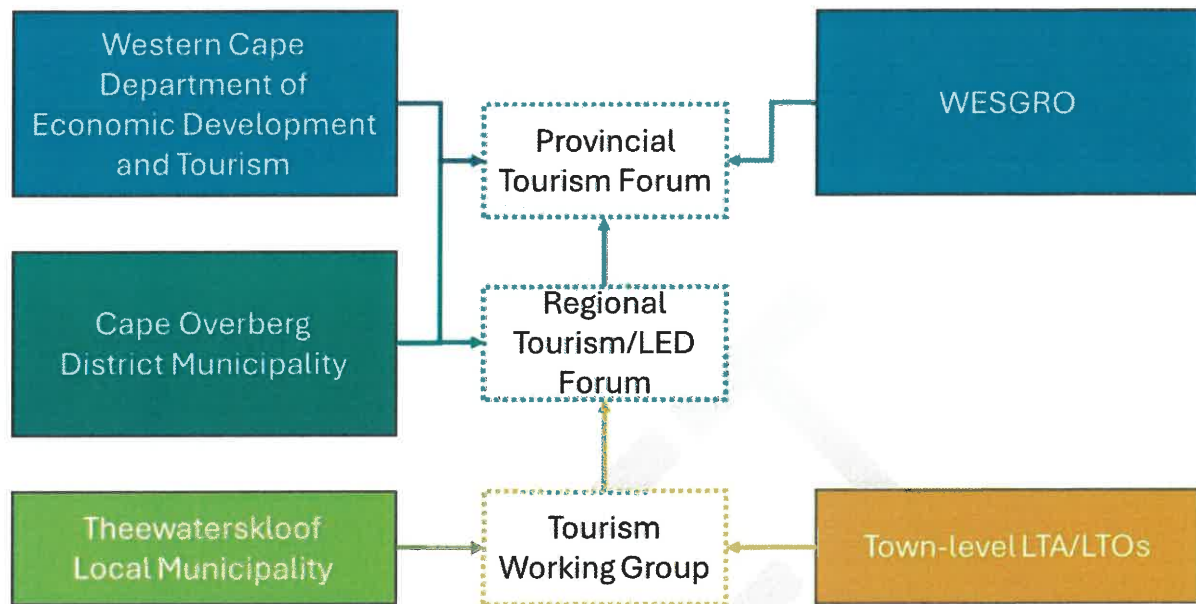
7.1. Institutional Structure

The following figure outlines the institutional framework from the provincial to the local level, highlighting how the Theewaterskloof Local Municipality can enhance its tourism support functions. At the provincial level, the Western Cape Department of Economic Development and Tourism prioritizes tourism growth and support. This department collaborates with various development agencies to improve regional destination planning. WESGRO is responsible for destination marketing in the Western Cape; however, there is currently no regional tourism organization to facilitate collaboration in these marketing efforts, which are supported by the District LED unit.

At the local level, the LED unit manages destination marketing for the municipality, while Local Tourism Organizations (LTOs) at the town level promote the interests of their members, such as the Caledon Tourism Office, known as Beyond Black Mountain NPC. Additionally, Elgin Valley Tourism is in the process of reestablishing itself to support local tourism marketing. Despite these initiatives, many structures remain underdeveloped, resulting in a lack of coordination in tourism planning and destination management within the Theewaterskloof Local Municipality.

Overall, the Theewaterskloof Local Municipality oversees tourism initiatives, supported by the Tourism Working Group and local LTOs. Above them, the Cape Overberg District Municipality manages tourism through its District LED office. At the provincial level, the Western Cape Department of Economic Development and Tourism collaborates with the Provincial Tourism Forum and WESGRO to enhance tourism development throughout the region.

Figure 34: Institutional structure



7.2. Municipality's Mandate

Supporting and promoting local tourism is a functional competency of local government as per Schedule 4 (B) of the Constitution. This includes “the provision of infrastructure, the development of tourist attractions and experiences, support for festivals and events, and the implementation of tourist promotion plans.”¹⁵ As prescribed in the Constitution (1996) and Tourism Act (1993), tourism falls under the mandate of Local Economic Development (LED). The Municipal Systems Act specifies tourism to be incorporated into the municipal integrated development plan to attract business, sport, and/or leisure tourism through the provision of infrastructure and investment promotion. Further, ensuring that the municipality's policy framework, capacity, and budgets prioritises the tourism sector within its municipal functions.

In the effort to establish an enabling environment for tourism to flourish, role players should be reminded of the key principles that guide the development of responsible tourism in South Africa, as outlined in the 1996 White Paper:

- The government will provide the enabling framework for the industry to flourish
- Effective community involvement will form the basis of tourism growth
- Tourism development will be underpinned by sustainable environmental practices
- Tourism development is dependent on the establishment of cooperation and close partnerships among key stakeholders

¹⁵ SALGA, LOCAL GOVERNMENT: A KEY ENABLER IN SUSTAINABLE LOCAL TOURISM, 2020

- Tourism will be used as a development tool for the empowerment of previously neglected communities
- Tourism will be private sector driven

Responsibilities of Theewaterskloof Local Municipality in Tourism:

- **Destination Management:** The municipality ensures effective destination management by improving accessibility, developing infrastructure, and maintaining municipal services. It also emphasizes training and skills development for the local workforce, supporting sustainability in tourism. Currently, the Skills Development and Innovation Directorate offers six funded programs for experiential learning and work placements for unemployed youth in the Western Cape.
- **Destination Development:** Focused on enhancing tourism attractiveness and competitiveness, the municipality engages in strategic planning and investment. This includes creating new tourism products, improving existing offerings, and fostering community involvement. Key initiatives involve infrastructure upgrades and promoting local culture, heritage, and natural resources, all while collaborating with stakeholders to meet local needs.
- **Destination Marketing:** The municipality coordinates efforts to market the destination, attracting visitors and boosting investment in the local economy. By positioning tourism as a vital economic driver, destination marketing helps increase external revenue, enhancing the local circular economy.

The Theewaterskloof Local Municipality ensures effective destination management through infrastructure development, accessibility improvements, and training programs for the local workforce. By fulfilling these mandates, municipalities are essential in cultivating a vibrant and sustainable tourism sector that supports both local and national economic development. **This leads to the important role of local tourism organisations in promoting and developing tourism within their areas.**

Local tourism organisations in Theewaterskloof

Local tourism organisations have specific mandates focused on promoting and developing tourism within their areas. These entities operate at the local level and hold several key responsibilities. The table below outlines the primary responsibilities of local tourism organizations in the tourism sector:

Table 16: Roles and responsibilities of LTOs

Tourism Component	Description
Marketing and Promotion	These organisations are responsible for marketing and promoting their respective destinations to both domestic and international tourists. They develop and implement marketing campaigns, participate in tourism trade shows, and create promotional materials to showcase their unique attractions and offerings.
Destination Management	Local and regional tourism organisations manage and enhance the overall tourism experience in their areas. This involves coordinating efforts to improve tourism infrastructure, facilities, and services to ensure a high-quality visitor experience.

Tourism Component	Description
Product Development	These organisations work on developing new tourism products and experiences that can attract more visitors. This includes identifying and promoting new tourist attractions, activities, and events that can enhance the destination's appeal.
Research and Statistics	Conducting research and gathering tourism statistics is an important mandate. Local and regional tourism organisations collect data on visitor numbers, preferences, and economic impact, which helps in informed decision-making and strategic planning.
Stakeholder Engagement and Coordination	These organisations act as a liaison between various stakeholders in the tourism sector, including local businesses, government agencies, and community groups. They facilitate collaboration and partnerships to ensure a coordinated approach to tourism development and promotion.
Advocacy and Lobbying	These organisations advocate for the interest of the tourism sector within their regions. They lobby for supportive policies, funding, and infrastructure development that can benefit tourism growth.
Event Support and Promotion	Supporting and promoting events that attract tourists is a significant part of their role. This includes assisting with the planning, marketing, and execution of festivals, conferences, sports events, and other attractions.

Local tourism organisations operate at the grassroots level, focusing on enhancing regional tourism through various initiatives. These entities hold several key responsibilities that contribute to the overall tourism landscape. **Understanding their functions sets the stage for recognizing the contributions of other stakeholders in the tourism sector.**

Other stakeholders in Theewaterskloof

The key responsibilities of other stakeholders involved in the tourism sector are outlined in the table below:

Table 17: Other stakeholder's roles and responsibilities

Other Stakeholder	Responsibilities
Provincial Government	○ Ensure that viable tourism projects are incorporated in the IDPs and provincial tourism plan ○ Partner with RTO/LTO on relevant projects with both technical and financial assistance ○ Establish and provide financial support to the RTOs/LTOs as and when budgeted for ○ Upkeep and development of public tourist attractions. E.g. historical, cultural and environmental ○ Assist with the provisioning of local road signs

Other Stakeholder	Responsibilities
	○ Maintain the general safety, upkeep, cleanliness and beautification of the local area ○ Initiate local, regional and provincial initiatives to raise awareness and understanding of tourism among the population or communities
Destination Marketing Organisation	○ Guide and lead the implementation of the provincial tourism marketing policy and strategy ○ Cooperate with SAT to generically marketing the province globally as a key part of the South African tourism product ○ Coordinate marketing activities and branding in partnerships with RTOs ○ Initiate provincial initiatives to raise awareness and understanding of tourism among the population or communities ○ Attend meetings at the Provincial Tourism Forum ○ Provide information on all marketing opportunities and ensure maximum participation ○ Provide advice on marketing issues and engage in marketing activities ○ Ensure that visitor statistics and current trends are communicated
Provincial Economic Development and Tourism Departments to Municipalities	The department needs to ensure that the municipalities: ○ Get technical support and advice on tourism issues ○ Are represented at the Provincial Tourism Forum and Provincial Intergovernmental Forum ○ Partner with the department on relevant projects with both technical and financial implications

To elevate tourism development and foster collaboration within Theewaterskloof, the formation of a dedicated **Tourism Working Group** is crucial. This group would unite stakeholders, streamline efforts, and create a cohesive strategy to drive sustainable growth and enhance the region's tourism offerings.

Theewaterskloof tourism working group

Working groups play a crucial role in the tourism sector by uniting diverse stakeholders to collaboratively address challenges and seize opportunities. These groups focus on key areas such as marketing, sustainable tourism, and community engagement by leveraging the unique insights and resources of each member to develop targeted strategies that enhance tourism offerings and promote local attractions. This collaborative approach fosters the growth and sustainability of the tourism industry.

In the context of developing a tourism strategy for Theewaterskloof, initiating the process with working groups can be highly effective. Given the absence of a functioning Regional Tourism Organisation (RTO), it is essential for Theewaterskloof Local Municipality to connect with and receive support from the district. This collaboration will strengthen the strategy and ensure alignment with broader regional tourism goals.

Table 18: Tourism working groups roles and responsibilities

Tourism component	Description
Theewaterskloof Brand Establishment	Determine the brand for Theewaterskloof whereafter developing and implementing marketing strategies to attract visitors and promote the local attraction in the TWK area.
Sustainable Tourism	Create initiatives and further develop already established initiatives to promote environmentally friendly practices and conservation efforts within the tourism sector.
Community Engagement	Foster and enhance relationships within the local community to ensure the involvement of SMME owners in tourism development initiatives.
Product Development	Identify and enhance tourism products and services to meet market demand and improve visitor experience.
Visitor Experience	Gather feedback from tourists and locals to enhance the overall visitor experience and address any concerns.
Stakeholder/SMME collaboration	Facilitate and assist with communication and collaboration efforts among different stakeholders, including businesses, NGOs and government agencies.
Market Research	Conduct research to gather insights on tourism trends and visitor demographics, to assist with strategic planning.
Event Planning/Facilitation	Organise events and festivals that promote the area's authentic brand to attract visitors to boost tourism and community involvement.
Training	Provide training programmes to local businesses, SMMEs, tour operators, and stakeholders involved in the tourism sector to enhance their skills and improve service quality in the sector.
Crisis Management	Develop and implement plans to address potential crises that could impact tourism, ensuring preparedness and resilience.

To enhance collaboration and effectiveness in tourism development, it is recommended to establish a Tourism Working Group at a micro level that directly connects with the Theewaterskloof Local Municipality and engages with external stakeholders. This group will function as a subdivision of the broader tourism forum, providing an inclusive platform to shape the future of tourism in the area. By nominating individuals with relevant expertise, particularly those already involved in the hospitality sector, the working group can focus on defining the brand for Theewaterskloof and advancing key tourism initiatives. Maintaining a smaller group size will enhance effectiveness and foster meaningful collaboration, ensuring that diverse perspectives are integrated into the decision-making process.

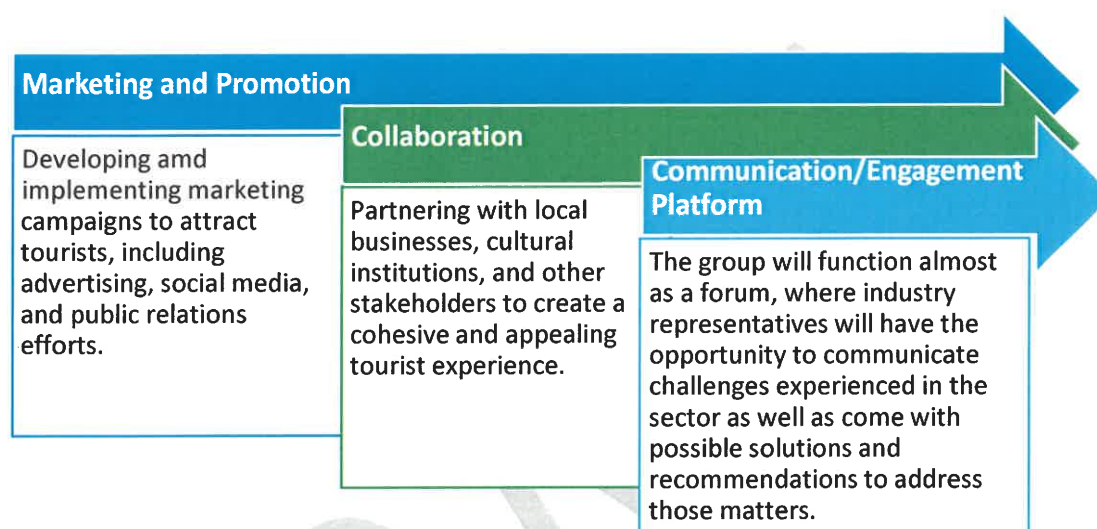
Local tourism organizations have specific mandates focused on promoting and developing tourism within their areas. Commonly referred to as tourism authorities, tourism agencies, or destination management organizations (DMOs), these entities operate at the local level and hold several key responsibilities. The table below outlines the primary responsibilities of local tourism organizations in the tourism sector:

This initiative addresses the strategic challenges faced by the Theewaterskloof Local Municipality, particularly in the realm of collaborative tourism marketing and promotion. The establishment of a

Tourism Working Group will consist of individuals that are nominated as a recommended action from the hospitality industry, who are dedicated to promoting and managing tourism activities in the area. The primary objective of this working group is to develop strategies and initiatives that attract visitors, enhance the tourist experience, and support the local economy through tourism.

Some key functions of the tourism working group include, but are not limited to the following:

Figure 35: Tourism working group functions



The proposed structure for the Theewaterskloof Local Municipality Tourism Working Group emphasises collaboration among various stakeholders without the formalities of a committee. This group will include representatives from different sectors within tourism, nominated by the hospitality industry and will operate under the guidance of the Senior Development Officer for Tourism and Marketing, who will act as the liaison with the district.

It is recommended that members have a background in tourism or hospitality, as their expertise will enhance the group's effectiveness in developing the local tourism sector. The group can establish Terms of Reference outlining its objectives, roles, responsibilities and procedures to ensure clarity and alignment in its efforts.

While Theewaterskloof Local Municipality play a crucial role in supporting tourism infrastructure and internal policies, appointing a local Tourism Working Group could harness specialised expertise, enhance efficiency, foster innovation, and promote accountability. This approach would lead to more effective and impactful destination marketing efforts within the Theewaterskloof Local Municipality. By focusing specifically on tourism, the working group can create tailored strategies that resonate with visitors and drive sustainable growth for the local tourism sector.

7.3. Main challenges

During the stakeholder consultations, several recurring issues were identified as obstacles to tourism development in the area. While all these issues are significant and need to be addressed to realise Theewaterskloof's vision of becoming the premier destination in the Cape Country, an implementation plan has been established to prioritise five key issues that are achievable within the next five years. This prioritisation does not diminish the importance of other issues, however some of them will take more time to resolve due to red tape. Many of the identified priorities stem from a lack of funding towards tourism development. To address these, one of the key actions is to appoint a Destination Marketing Organisation (DMO), which will help tackle most priorities, particularly those related to marketing in the area.

The following main challenges have been identified within the local sector:

Table 19: Main challenges

Destination marketing	There is no brand marketing in the area to establish Theewaterskloof as a leading tourism destination.
	No support from TWKM to SMME tourism operations.
	There is a need for partnerships and collaboration to develop a unified tourism experience for the area.
	A lot of land in Theewaterskloof is state owned land which makes it difficult for possible investors in the area.
	The apple industry/agri-tourism plays a significant role in the Elgin Valley and should be integrated into the area's marketing strategy. Highlighting various tourist attractions will help position TWK as the premier destination in the Cape Countryside.
	A clear brand for Theewaterskloof (TWK) should be developed to authentically showcase the area's unique strengths and offerings by actively engaging the private sector in the branding process to ensure collaboration and buy-in.
	A solid foundation for destination marketing is needed, incorporating social media engagement, newsletters, and targeted promotional activities, while leveraging local events and attractions to generate media exposure.
Tourism sector development	There is insufficient utilization of existing resources and initiatives in the area. It is essential to focus marketing strategies on high-potential growth areas, such as township and rural tourism.
	Tourism stakeholders and associations often focus on their individual marketing goals rather than collaborating on a unified strategy that benefits the entire section. It's essential to provide cohesive and comprehensive tourist information rather than presenting isolated perspectives. The emphasis should be on viewing tourism as a collective experience rather than just promoting specific areas.
	Difficult for possible investors to invest in the area for tourism development.
	Lack of capacity and funding on a local level.
	Ground-level support is not provided towards tourism development for local business owners.
	Poor communication channels from district side to the local communities.

	There is a lack and disconnect of cohesion regarding the institutional functioning of the municipality within the tourism sector.
	Not all tourism offerings in the area are currently included in development efforts. To enhance the tourism experience, it is important to explore cultural offerings, adventure activities, and agritourism, while focusing on unique local experiences that align with current trends and visitor interests.
	A comprehensive and updated database is essential for the area. Conduct internal audits to evaluate local tourism offerings and develop an incentive policy to encourage participation from small businesses and entrepreneurs.
	Relationships between local communities are insufficient. Regular stakeholder engagements should be conducted to gather feedback and foster stronger connections with local communities and businesses.
	The partnership between the district, local municipality, and local stakeholders is fractured. It is vital to establish new partnerships with the district and actively engage local stakeholders to promote collaboration and support for tourism strategies.
	The municipality must clearly articulate its commitments to tourism development and support. Establishing a robust institutional framework is essential to effectively support tourism initiatives.
	Tourism signage is necessary to promote and develop the sector in the area. The challenge currently is the application process for signage on public and provincial roads.
Safety and security/maintenance of infrastructure	Intersections into towns, especially the three entrances to Grabouw are a concern with getting on and off the N2. Bystanders is also throwing stones at bypassing cars which put the safety of visitors at risk.
	Law enforcement issues in the area, there is not enough to assist to ensure the safety of visitors.
	There is a lack of general maintenance that affects the visual appeal of the town entrances for visitors. Specifically, the entrance to Villiersdorp from the Grabouw side has been noted, as it is affected by garbage piles and unkept gardens.
	There is inadequate signage for tourism offerings in the area. To address this, improve tourism signage by streamlining approval processes and maintaining existing signs, while also developing welcoming signage at key traffic points to effectively guide visitors.
	There is a lack of infrastructure and accessibility to tourist areas. It is essential to incorporate road infrastructure and maintenance into the tourism strategy to improve accessibility and enhance the visitor experience.
	The safety of mountain biking and hiking routes should be a top priority. Although there are security measures in place where forest monitors, monitor the area, it's important to regularly evaluate these efforts to ensure they remain effective. These routes are a key reason why people visit the area.
Lack of funding and financial resources	Sector role players are not on the same page when it comes to tourism planning and development.
	Currently the TWKM does not have a budget towards tourism development.
	Clarity on the allocation of roles and responsibilities needs to be provided.

Tourism implementation plan	Support for sector development should be practical and realistic, focusing on what can be achieved in the area.
	Focused efforts and commitment are essential to ensure that tourism strategies and plans are effectively implemented.
	The area requires a comprehensive database. Develop a detailed database of local tourism assets, small businesses, and community offerings to support informed planning and decision-making.
	A Tourism Working Group should be established to drive initiatives aimed at positioning Theewaterskloof as a leading destination. It is important to nominate representatives for this group to ensure coordinated efforts in tourism planning and marketing.
	Communication within the sector is inadequate. It is essential to foster regular communication among local, district, and provincial levels to align strategies and initiatives, ensuring that programs are effectively disseminated and implemented.
	An action rollout plan, along with a monitoring and evaluation framework, is necessary to ensure that sector development and growth are sustained.

7.3.1. Key considerations

This section outlines key considerations prioritized to address the main challenges identified during the online stakeholder sessions. Each consideration is categorized by consequence type and severity level, enabling a structured approach to tackle the most pressing issues facing tourism development in Theewaterskloof.

By focusing on these considerations, particularly those marked in red that require immediate attention, we can effectively mitigate risks and enhance the region's appeal as a premier destination in the Cape Countryside. While all listed items hold significance, the phased implementation allows for the strategic allocation of resources and attention, ensuring a comprehensive and sustainable tourism strategy for the area.

The priority levels include:

- **Insignificant** issues that require low urgency and are easier to accomplish;
- **Minor** concerns that are relatively straightforward to resolve;
- **Moderate** issues that are important to address but may be more challenging;
- **Serious** problems that need timely resolution;
- **Major** concerns that require prompt action; and
- **Critical** issues posing severe threats that need immediate intervention.

By prioritizing these key areas, the aim is to foster a thriving tourism sector that benefits both the community and visitors alike.

Table 20: Key considerations

SEVERITY LEVEL	1	2	3	4	5
Priority Level	Moderate	Minor	Serious	Major	Critical
Destination marketing	Sustainable responsible tourism: Promote eco-friendly practices through local events and workshops.	Determine target market: Identify key demographics (e.g., adventure seekers, families etc.) using surveys and social media analytics.	Integrated marketing: Create a cohesive marketing strategy using digital channels, local media, and collaborations with influencers to promote Theewaterskloof.	Collaborative partnerships: Establish partnerships with local businesses, NGOs, and community groups to enhance brand visibility and create joint marketing campaigns.	Appoint a Tourism Working Group: Appoint a dedicated tourism working group to oversee tourism initiatives, funding, and marketing efforts, ensuring a unified approach.
	Promotional review: Conduct regular reviews of promotional materials to ensure accuracy and consistency.	Social media: Increase social media presence and engagement efforts through targeted campaigns to raise brand awareness.	Branding workshops: Initiate a branding workshop with all stakeholders involved to clarify and enhance TWK identity within the tourism sector.	Marketing strategy: Develop a comprehensive marketing strategy with allocated resources.	Crisis/communication plan: Re-evaluate all marketing efforts and implement a crisis communication plan to restore the destination's reputation.

SEVERITY LEVEL	1	2	3	4	5
Priority Level	Moderate	Minor	Serious	Major	Critical
Tourism sector development	Digital signage and interactive maps: Implement basic signage to improve navigation and enhance visitor experience in key areas of tourism. Ongoing engagement: Continue with stakeholder engagements.	Training to enhance service delivery: Provide workshops for local service providers (accommodation establishments, tour restaurants, tour operators etc.) Business outreach: Encourage participation from SMMEs through outreach programs and incentives.	Leverage/maximise agri-culture tourism: Create a strategic plan to leverage agri-tourism in TWK, integrating local farms and agricultural experiences to enhance the overall tourism offering in the area. Commitment statement: Establish a clear commitment from the municipality that outlines the support they are able to give towards tourism initiatives/development.	Clear communication channels: Establish reliable communication channels among stakeholders, the LM and DM and local community. Partnerships establishment: Create a structured partnership framework to enhance collaboration among stakeholders.	Involve local communities: Create programmes that actively engage residents in tourism development, ensuring their input and benefits are prioritised. Recovery plan development: Develop a comprehensive recovery plan that addresses all aspects of tourism support and infrastructure.
Safety and security/maintenance of infrastructure	Evaluation of hiking and mountain biking routes: Conduct basic assessments of trails to ensure they are safe and well-maintained.	Tourist areas should be better marked: Improve signage in key tourist areas to enhance visitor navigation and safety.	Increase law enforcement to ensure the safety of visitors: Collaborate with local law enforcement to increase presence in tourist areas during peak season.	Visitor safety training: Develop training programs on safety protocols and add safety signs or contact numbers for visitors should they be in an unsafe situation.	Crisis management plan: Establish a detailed crisis management plan outlining procedures for various scenarios (e.g., natural disasters, health emergencies etc.) to ensure a quick and effective response.

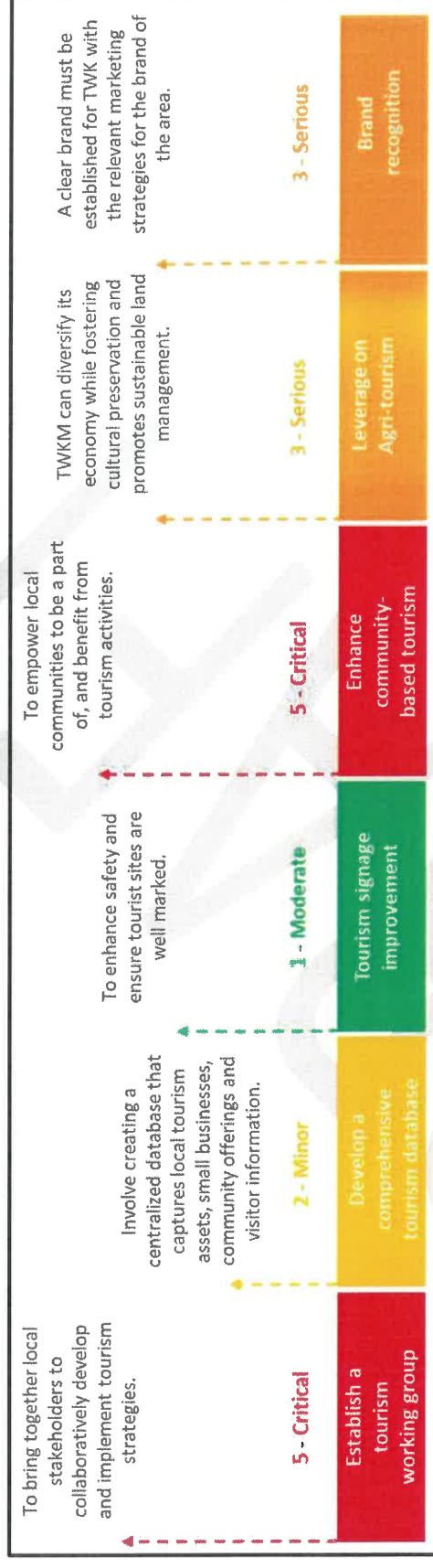
SEVERITY LEVEL	1	2	3	4	5
Priority Level	Moderate	Minor	Serious	Major	Critical
Lack of funding/financial resources	Routine maintenance: Conduct routine maintenance checks on signage and minor infrastructure assets.	Maintenance schedule: Schedule regular maintenance for key infrastructure to prevent inconvenience.	Priority repairs: Prioritise repairs and upgrades for deteriorating infrastructure that hinders visitor accessibility and safety.	Safety plan: Implement a safety audit and establish a rapid response plan for infrastructure issues.	Emergency improvement plan: Launch an emergency infrastructure improvement program and communicate safety measures to the public.
	Free to assist with infrastructure: Utilise volunteer programs to support minor infrastructure improvements and maintenance.	Collaborate with local businesses: Encourage local businesses to contribute to tourism initiatives through sponsorships or in-kind services.	Alternative funding sources: Explore grants, crowdfunding, and public-private partnerships to secure funding for tourism projects.	Clear roles among stakeholders: Define roles and responsibilities for stakeholders to ensure efficient use of resources and accountability.	Event based funding: Organise events or festivals that can generate revenue and attract visitors, with proceeds reinvested into tourism development.
	Budget monitoring: Monitor budget allocations and adjust minor expenses as necessary.	Sponsorships: Seek sponsorships to support specific initiatives towards tourism development in the area.	Funding proposal development: Develop a funding proposal to attract larger investments and partnerships.	Fundraising campaign: Initiate a fundraising campaign and explore alternative funding sources, such as public-private partnerships.	Emergency funding strategy: Conduct emergency meetings with stakeholders to identify immediate funding solutions and prioritise essential projects.

SEVERITY LEVEL	1	2	3	4	5
Priority Level	Moderate	Minor	Serious	Major	Critical
Tourism implementation plan	Launch pilot projects: Start small-scale initiative updates with stakeholders about project progress and any necessary adjustments.	Ongoing communication: Maintain regular updates with stakeholders about project progress and any necessary adjustments.	Monitoring and evaluation framework: Establish clear metrics to assess the effectiveness of tourism initiatives and adapt strategies accordingly.	Stakeholder engagement sessions: Organise regular meetings and workshops with stakeholders to gather input and ensure their continued support for tourism initiatives.	Strategic risk management plan: Develop a plan to identify potential risks to tourism development and outline strategies to mitigate them effectively.
	Periodic review: Conduct periodic reviews of implementation progress with minor adjustments as needed.	Database timeline: Create a timeline for the completion of the comprehensive database to improve planning.	Monitoring framework: Establish a monitoring framework to track implementation progress and address gaps in the sector.	Enhanced communication: Enhance communication strategies among stakeholders to ensure coordinated efforts.	Implementation plan overhaul: Develop a complete overhaul of the implementation plan, engaging all stakeholders in a collaborative review process.

8. Implementation Priorities

The following section presents the implementation strategy for the Theewaterskloof Local Municipality to advance the core priorities of the Tourism Sector Plan. This strategy focuses on destination management and marketing, aligning with key considerations based on the type of consequence.

Figure 36: Implementation priorities



8.1. Establishing a Tourism Working Group

Establishing a Tourism Working Group in the Theewaterskloof Local Municipality presents numerous opportunities to enhance local economic development, promote cultural heritage, and improve community engagement. The group can focus on initiatives that create tourism related job opportunities in hospitality, tour guides, and local crafts, significantly reducing unemployment in the area. It can also highlight the municipality's rich cultural and historical aspects, attracting cultural tourism through diverse communities and heritage sites. By encouraging participation from residents, businesses, and cultural groups, the working group fosters a sense of ownership and collaboration in tourism development. Given the municipality's proximity to the Kogelberg Biosphere, the group can promote eco-tourism initiatives that prioritise sustainable practices, appealing to environmentally conscious travellers. This collaboration not only supports local economies but also fosters the conservation of biodiversity. Overall, leveraging the biosphere's unique attributes can position Theewaterskloof as a leading eco-tourism destination.

Table 21: Establishment of a tourism working group

Project name	Establishment of a tourism committee
Description	The Tourism Working Group will serve as a collaborative platform for local stakeholders in the Theewaterskloof Local Municipality to develop and implement strategies aimed at enhancing tourism. This group will include representatives from businesses, community organisations, cultural groups and government bodies.
Rationale	Establishing this group will facilitate better coordination among stakeholders, foster community engagement, and leverage local assets to drive sustainable tourism development. It aims to address unemployment, promote cultural heritage, and enhance the municipality's appeal as a tourist destination.
Objectives	○ To create job opportunities in tourism-related sectors ○ To promote local cultural heritage and historical sites ○ To enhance eco-tourism initiatives in collaboration with the Kogelberg Biosphere ○ To foster stakeholder collaboration and community ownership of tourism initiatives
Area of influence	○ Grabouw/Elgin ○ Villiersdorp ○ Botrivier ○ Tesselaarsdal ○ Caledon ○ Greyton/Genadendal ○ Riviersonderend
Planned activities	○ Regular meetings to discuss tourism strategies and initiatives ○ Workshops for capacity building in hospitality and tourism services ○ Marketing campaigns to promote local attractions and cultural heritage ○ Community events to celebrate local traditions and arts

Project name	Establishment of a tourism committee
	Development of eco-tourism trails and activities
Role players/responsibilities	Local Government: Provide administrative support and facilitate meetings Business Representatives: Share insights into tourism trends and customer needs Community leaders: Engage residents and gather input for initiatives Cultural groups: Promote and showcase local heritage and traditions Environmental organisations: Advise on sustainable practices and eco-tourism initiatives
Target/Output	- Increase in tourism-related job opportunities by a specific percentage within a set timeframe - Growth in visitor numbers to cultural and natural sites - Successful execution of community events and marketing campaigns - Establishment of eco-tourism activities and partnerships
Potential funding sources	- Local government budgets for tourism development - Sponsorships from local businesses - Partnerships with NGOs focused on community development and conservation

8.2. Develop a comprehensive tourism database

Establishing a comprehensive tourism database requires a strategic approach that integrates various stakeholders to enhance tourism development and management. This database will serve as a centralized resource for information on local tourism assets, small businesses, community offerings, and visitor data. By conducting thorough market research, the database will help identify visitors preferences and trends, allowing for tailored offerings that meet demand. The database will unite local businesses, government agencies, and community organisations, ensuring that all perspectives are considered and that the interests of different groups are balanced. While primarily focused on data collection and management, this initiative will expand its role to include analysis and reporting that inform strategic decisions.

The comprehensive tourism database will support targeted marketing campaigns that highlight the destination's unique features and experiences, effectively attracting visitors. Additionally, it will promote sustainable tourism practices by tracking visitor impact and supporting initiatives that benefit local communities and protect the environment, thereby preserving the destination's appeal for future generations.

Table 22: Development of a comprehensive tourism database

Project name	Coordination of a regional DMO
Description	The comprehensive tourism database will serve as a centralized platform for collecting, storing, and analysing data related to local tourism assets, businesses, visitor demographics, and trends. This resource will facilitate informed decision-making and strategic planning for tourism development in the Theewaterskloof Local Municipality.

Project name	Coordination of a regional DMO
Rationale	A well-organised tourism database is essential for understanding market dynamics and visitor preferences. By consolidating relevant tourism information, stakeholders can tailor their offerings, enhance marketing strategies, and improve overall tourism management. This initiative will also promote collaboration among stakeholders and support sustainable tourism practices.
Objectives	○ To create a centralized repository of tourism-related data ○ To analyse visitor preferences and trends to inform marketing strategies ○ To support local businesses by providing insights into market demands ○ To facilitate sustainable tourism practices through data-driven decision making
Planned activities	○ Conduct an inventory of existing tourism assets and businesses ○ Develop a user-friendly database platform for data entry and access ○ Gather data through surveys, visitor feedback, and market research ○ Regulatory update and maintain the database to ensure accuracy and relevance ○ Train stakeholders on how to use and contribute to the database
Area of influence	○ Cape Overberg District Municipality ○ Key focus points in the area ○ Local businesses and tourism operators
Role players/responsibilities	○ Local government: Provide funding, support and oversight for database development ○ Tourism operators and businesses: Contribute data and feedback on market needs and trends ○ Community organisations: Assist in gathering data and promoting the database within the community ○ IT specialists: Develop and maintain the database platform, ensuring it is user-friendly and secure ○ Research/analysts: Analyse data to generate insights and reports for stakeholders
Target/output	○ A fully operational tourism database within a specific timeframe ○ Increased participation from local businesses and stakeholders in data collection ○ Regular reports on visitor trends and market insights generated from the database ○ Improved marketing strategies based on data-driven insights, leading to increased visitor numbers
Potential funding sources	○ Local government budgets allocated for tourism development ○ Grants from tourism and economic development agencies ○ Sponsorships from local businesses invested in tourism growth

Project name	Coordination of a regional DMO
	○ Partnerships with academic institutions for research and development support ○ Crowd funding initiatives aimed at enhancing local tourism infrastructure

8.3. Tourism Signage

Enhancing signage can significantly boost tourism in the municipality by offering visitors clear, informative, and visually appealing guidance. To create an effective signage strategy, it's important to engage stakeholders, including local businesses, community members, tourism professionals, and graphic designers. Additionally, regular maintenance and updates are vital to keep the signage relevant and in good condition.

Table 23: Tourism signage

Project name	Tourism signage
Description	Tourism signage is essential for enhancing the visitor experience, serving multiple purposes such as attracting tourists, offering directions, and providing educational information. It significantly influences the visibility and marketing of tourism products. Without adequate signage, roads become less navigable for tourists, making it challenging to encourage spontaneous visits from those driving through the area.
Rationale	Effective tourism signage is vital for improving the visitor experience by offering clear, informative, and easily accessible information. It enables tourists to locate attractions, accommodations, and services with ease, minimising confusion and stress. Well-designed signage enhances safety by directing visitors through unfamiliar areas and providing crucial information about emergencies and safety protocols. Additionally, it plays a key role in shaping the destination's aesthetic and branding, fostering a welcoming and cohesive visual identity. Furthermore, interpretative signage can inform tourists about the local culture, history, and environment, enriching their overall experience and encouraging them to stay longer and return in the future.
Objectives	○ Enhance navigability: Ensure all signage is clear, legible, and strategically placed to guide tourists efficiently to key attractions, services, and facilities, reducing confusion and improving overall visitor satisfaction. ○ Promote safety: Include signs that highlight important safety information, such as emergency exits, first aid locations, and hazard warnings, to ensure tourists feel secure and well-informed throughout their visit. ○ Strengthen brand identity: Design signage that reflects the destination's unique character and branding, creating a cohesive visual identity that enhances the aesthetic appeal and reinforces the destination's image and attractiveness.

Project name	Tourism signage
	○ Educate and inform: Incorporate informative elements into signage that educate tourists about the local culture, history, and environment, enriching their experience and fostering a deeper connection with the destination.
Identified locations	National roads: ○ N2 Provincial roads: ○ R43 ○ R406 ○ R316 ○ R321 ○ R45
Planned activities	1. Signage audit: ○ Conduct audits and mapping of tourism signage to identify needs and challenges. ○ Review existing signage and enhance it as needed, such as updating electronic tourism boards. 2. Tourist signage application and erection: ○ Facilitate the application process for signage and provide support to ensure effective signage across the district. ○ Add additional signage along major tourism routes and towns. ○ Provide directional signage to key tourist destinations within towns, especially for hiking- and mountain biking routes in the area. 3. Heritage interpretative signage: ○ Research key heritage sites and add interpretative signage at these locations (<i>The Theewaterskloof Nature Reserve forms part of the Boland Mountain Complex, which is a World Heritage Site</i>).
Role players/responsibilities	○ Western Cape Department of Transport ○ SANRAL ○ Cape District Municipality ○ TWKM ○ Tourism Committee ○ Western Cape Department of Sport, Recreation, Arts and Culture ○ Western Cape Department of Economic Development and Tourism
Target/output	○ Increase visibility of tourism products ○ Increased tourist satisfaction and safety ○ Enhanced destination image ○ Preservation and promotion of heritage
Capex estimate	Coordination of tourist signage (R400 000) Heritage sites interpretative signage (R1 500 000)
Potential funding sources	○ Western Cape Department of Transport ○ SANRAL ○ Western Cape Department of Sport, Recreation, Arts and Culture ○ Western Cape Department of Economic Development and Tourism

8.4.Enhance community-based tourism

Community-based tourism (CBT) is a sustainable tourism approach that involves local communities in planning and managing tourism activities. It focuses on benefiting residents economically, preserving cultural heritage, and protecting the environment, fostering authentic interactions between tourists and locals. CBT can significantly enhance Theewaterskloof Local Municipality by fostering economic growth and creating job opportunities for residents. This approach encourages the preservation of cultural heritage and traditions, allowing communities to share their unique stories and practices with visitors, which in turn boosts local pride and cohesion. By involving residents in the management of tourism activities, CBT promotes sustainable environmental practices, as locals are more invested in protecting their natural resources. Additionally, tourists benefit from authentic experiences that showcase the region's beauty and culture, leading to positive word-of-mouth and repeat visits. Overall, CBT can drive sustainable development, creating a win-win situation for both the community and its visitors.

Table 24: Community based tourism

Project name	Community-based tourism
Description	Community-based tourism is crucial for developing tourism because it empowers local communities to actively participate in and benefit from tourism activities. By involving residents in decision-making, it fosters economic growth, preserves cultural heritage, and promotes environmental sustainability. This approach ensures that tourism reflects the community's values and traditions, enhancing the visitor experience while creating a more equitable and resilient local economy.
Rationale	The rationale for community-based tourism lies in its ability to empower local communities by allowing them to control and benefit from tourism activities. It stimulates economic growth by keeping revenue local, promotes cultural preservation through the sharing of traditions, and encourages sustainable practices that protect the environment. Additionally, it enhances visitor experiences by offering authentic interactions with local culture, while fostering social cohesion within the community. This approach creates a more equitable and sustainable tourism model that benefits both residents and tourists.
Objectives	○ Empower local communities: Enable communities to actively participate in tourism planning and decision-making. ○ Increase economic benefits: Generate sustainable income opportunities for residents through tourism-related activities. ○ Promote cultural heritage: Preserve and showcase local traditions, arts, and customs to enrich the visitor experience. ○ Encourage sustainable practices: Implement environmentally friendly practices that protect natural resources and promote conservation. ○ Improve infrastructure: Enhance local infrastructure, such as transportation and facilities, to support tourism development.

Project name	Community-based tourism
	○ Foster collaboration: Build partnerships between stakeholders, including local governments, businesses, and community organisations. ○ Enhance visitor experience: Provide authentic and engaging experiences that connect tourists with the local culture and environment. ○ Monitor and evaluate: Establish systems to assess the impact of community-based tourism initiatives and make necessary adjustments.
Identified locations	○ Grabouw/Elgin ○ Villiersdorp ○ Botrivier ○ Tesselaarsdal ○ Caledon ○ Greyton/Genadendal ○ Riviersonderend
Planned activities	1. Stakeholder workshops ○ Organise workshops to engage local communities, businesses, and government officials in tourism planning and decision-making. 2. Training programs ○ Provide training for residents on hospitality, guiding, marketing, and sustainable tourism practices. 3. Community tours ○ Develop and promote community-led tours that showcase local culture, heritage and natural attractions. 4. Cultural events and festivals ○ Organise events that celebrate local culture, arts, and traditions to attract visitors. 5. Market research ○ Conduct research to identify target markets and develop tailored marketing strategies for the specific town/area. 6. Develop partnerships ○ Establish partnerships with local businesses, NGOs and tourism boards to strengthen the tourism sector.
Role players/responsibilities	○ TWKM ○ Business chambers ○ Tour operators/tour guides ○ Local communities ○ NGOs ○ Culture community leaders/cultural organisations ○ DMC (Destination Marketing Company)

Project name	Community-based tourism
Target/output	○ Economic growth ○ Increase in visitor numbers ○ Enhanced visitor experience ○ Community empowerment
Potential funding sources	○ Western Cape Department of Sport, Recreation, Arts and Culture ○ Western Cape Department of Economic Development and Tourism

8.5.Leverage on agri-tourism opportunities

Agri-tourism is a form of tourism that allows visitors to participate in agricultural activities, such as farm tours, fruit picking, and wine tastings to providing authentic experiences. For Theewaterskloof Local Municipality, agri-tourism holds significant potential benefits, including economic diversification for farmers through additional income streams and job creation in hospitality and related services. The municipality is already recognised for its agricultural practices, including wine production, apple farming, and the wool industry, which can be further developed to create a more comprehensive agri-tourism experience. Additionally, agri-tourism promotes cultural preservation by highlighting local traditions and farming methods while encouraging sustainable land management. It also fosters community engagement among farmers, businesses, and organisations, enhancing social cohesion and increasing awareness of local agriculture. Overall, agri-tourism is essential for developing a vibrant and sustainable tourism sector in the region.

Table 25: Leverage on agri-tourism opportunities

Project name	Agri-tourism
Description	Agri-tourism in Theewaterskloof offers visitors the opportunity to engage in agricultural activities, such as farm tours, fruit picking and wine tastings to create authentic experiences that showcase the area's rich agricultural heritage.
Rationale	By leveraging its established agricultural practices, including wine, apple farming, and wool production. Theewaterskloof can diversify its economy, provide additional income for farmers, and create jobs in the tourism and hospitality sectors. This approach fosters cultural preservation and promotes sustainable land management while enhancing community engagement.
Objectives	○ Economic diversification ○ Job creation ○ Cultural preservation ○ Sustainability ○ Community engagement
Identified locations	○ Grabouw - Apple/pear orchards - Wine region - Cultivation of fresh chrysanthemums, roses and proteas

Project name	Agri-tourism
	- Agricultural service centre and apple town ○ Botrivier - Vineyards - Wine farms ○ Caledon - Broader agricultural region produces wheat, barley and wool - Overberg-Agri is in Caledon ○ Villiersdorp - Fruit farms - Viticulture ○ Genadendal - Small-scale agricultural production - Fruit farms ○ Riviersonderend - Agricultural service centre
Planned activities	1. Farm tours ○ Organise guided tours of local farms to educate visitors about agricultural practices. 2. Workshops/classes ○ Offer hands-on workshops in activities like fruit picking and wine tasting. 3. Farm stays ○ Develop accommodation on working farms to provide visitors with immersive farm-work experience. 4. Agri-cultural events ○ Host seasonal festivals and events that celebrate local agriculture of the area such as harvest festivals, food fairs and wine tasting events. 5. Training for farmers ○ Provide training for farmers in hospitality, customer service and sustainable tourism practices. 6. Signage/wayfinding direction boards ○ Add signage to guide visitors to agri-tourism sites and highlight other agriculture attractions along the route.
Role players/responsibilities	○ TWKM ○ Local farmers ○ Agri-business owners ○ Tourism operators
Target/output	○ Increased awareness ○ Job creation ○ Community engagement
Potential funding sources	○ Department of Agriculture ○ Agri Western Cape ○ Western Cape Government

8.6.Brand recognition

Establishing a strong brand for Theewaterskloof is essential to secure the necessary support from visitors and position the area as the premier destination in the Cape Countryside, in line with the strategic vision for the tourism development of the area.

Table 26: Brand recognition

Project name	Brand recognition
Description	Brand recognition for Theewaterskloof involves creating a distinct and memorable identity that resonates with visitors, highlighting its unique offerings and experiences in the Cape Countryside. This identity should encompass visual elements, messaging, and values that effectively communicate what makes Theewaterskloof a desirable destination.
Rationale	Achieving strong brand recognition is vital for attracting visitors and fostering loyalty. A well-defined brand helps differentiate Theewaterskloof from other destinations, making it easier for potential tourists to identify and connect with the area. It builds trust and familiarity, encouraging visitors to choose Theewaterskloof over competing options. Moreover, effective brand recognition can enhance marketing efforts, leading to increased visitor engagement and investment in the local economy.
Objectives	○ Enhance visibility: Increase awareness of Theewaterskloof through targeted marketing campaigns that emphasise its unique attractions and experiences. ○ Foster emotional connections: Develop storytelling and brand awareness strategies that resonate with visitors, creating emotional ties that encourage repeat visits and word-of-mouth promotion. ○ Promote local culture and heritage: Highlight the cultural and historical aspects of Theewaterskloof to enrich the visitor experience and strengthen community pride. ○ Attract diverse visitors: Appeal to various demographics, including families, adventure seekers, and eco-tourists, by showcasing the area's diverse offerings. ○ Encourage stakeholder engagement: Involve local businesses and community members in brand-building efforts to create a cohesive and authentic representation of Theewaterskloof.
Identified locations	Theewaterskloof Local Municipal Area
Planned activities	Marketing Campaigns: ○ Digital marketing: Launch targeted online advertising campaigns across social media platforms and travel websites to reach potential visitors. ○ Content creation: Develop engaging content, such as blog posts and videos of tourism offerings in the area to showcase the unique attractions and experiences in TWK. Community Engagement Initiatives: ○ Workshops and training: Organise workshops for local businesses and stakeholders on brand messaging and customer service to ensure consistent visitor experience.

Project name	Brand recognition
	○ Community events: Host events that celebrate local culture and heritage, inviting residents and visitors to participate and connect with other role players in the sector. 3. Partnership Development: ○ Collaboration with influencers: Partner with travel influencers and bloggers to promote Theewaterskloof through authentic storytelling and experiences. ○ Joint promotions: Work with local businesses to create package deals that encourage visitors to explore multiple attractions within the area. 4. Branding Materials: ○ Visual identity development: Create a cohesive visual identity, including logos, color schemes, and signage that reflect the essence of Theewaterskloof. ○ Promotional materials: Design brochures, maps, and merchandise that incorporate the new branding to distribute at local attractions and events. 5. Feedback and Evaluation: ○ Visitor surveys: Conduct surveys to gather feedback from visitors on their perceptions of Theewaterskloof's brand and experiences. ○ Performance metrics: Establish key performance indicators (KPIs) to assess the effectiveness of branding initiatives, <u>adjusting strategies based on results.</u>
Role players/responsibilities	1. Tourism Working Group: ○ Coordination and strategy development: Lead the planning and implementation of branding initiatives to ensure alignment with the overall tourism goals for this area. ○ Stakeholder engagement: Facilitate collaboration among local businesses, community members and tourism stakeholders. 2. Local Businesses ○ Collaboration: Participate in joint promotions and package deals, contributing to a unified visitor experience. ○ Brand awareness marketing: Adopt and communicate the new brand identity. 3. Design and branding agencies (if applicable): ○ Visual identity development: Create branding materials, including logos, promotional material and signage. ○ Brand guidelines: Provide guidelines to ensure consistent application of the brand across all platforms and materials. 4. Influencers and brand ambassadors: ○ Promotion: Share authentic experiences and stories about Theewaterskloof through their platforms by reaching a wider audience.

Project name		Brand recognition
		○ Content creation: Produce engaging content that highlights the unique aspects of the destination. 5. Data analysts/researchers: ○ Performance metrics: Track and analyse data related to branding initiatives, providing insights for future adjustments.
	Target/output	1. Increase brand awareness: ○ Achieve a measurable increase in recognition of Theewaterskloof as a tourism destination, reflected in website traffic, social media engagement, and local media coverage. 2. Visitor engagement: ○ Enhance visitor engagement metrics, such as higher participation rates in local events, increased social media interactions, and positive feedback from surveys. 3. Diverse visitor demographics: ○ Attract a wider range of visitors, including families, adventure seekers, and eco-tourists, as indicated by demographic data collected through visitor surveys. 4. Community participation: ○ Foster stronger community involvement, with increased attendance at workshops and events, and greater participation from local businesses in branding efforts. 5. Improved visitor satisfaction: ○ Achieve higher satisfaction scores in visitor surveys, particularly regarding their perception of Theewaterskloof's offerings and overall experience. 6. Collaborative initiatives: ○ Establish successful partnerships with local businesses, influencers, and community organisations, resulting in at least a certain number of joint promotions or collaborative marketing efforts. 7. Sustainable tourism growth: ○ Measure growth in tourism-related revenue for local businesses and increased visitor numbers, contributing to the local economy and promoting sustainable tourism practices.
Potential sources	funding	○ Public-private partnerships (PPPs) ○ Corporate sponsorships ○ Crowdfunding campaigns ○ Nonprofit organisations and foundations ○ Tourism development funds

9. General Remarks

Theewaterskloof Municipality boasts a remarkable natural beauty, rich cultural heritage, and unique attractions that draw both international and, predominantly, domestic tourists. While the existing infrastructure is generally satisfactory, there is significant potential for enhancement, particularly in signage and the promotion of vital natural habitats that currently lack attention from local authorities.

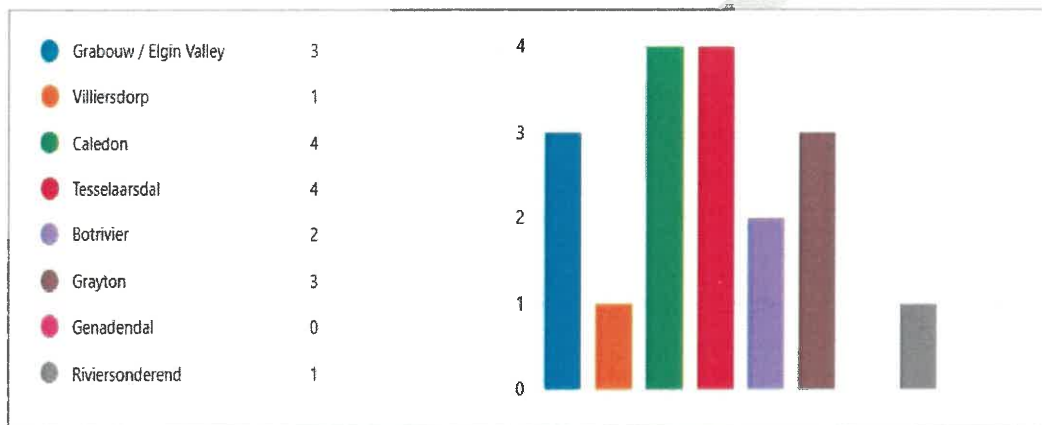
By integrating diverse tourism forms such as cultural, adventure, agricultural, and leisure tourism the region can create and market attractive packages that cater to a broad audience. Expanding trail tourism through improved maintenance and safety protocols for existing hiking and mountain biking trails presents a promising opportunity, as does the potential for cultural and heritage tourism to offer authentic insights into the area's history. Additionally, film tourism could leverage picturesque landscapes for economic growth. Engaging local communities in sustainable tourism practices is crucial for long-term success, alongside a strategic marketing approach that emphasises the unique features of Theewaterskloof's seven distinct towns. The effectiveness of the Theewaterskloof Tourism Strategy depends on strong leadership that aligns with a shared vision, fostering strategic partnerships with stakeholders. Advocacy for tourism as a key economic driver is vital for job creation and local growth. A results-oriented tourism department, equipped with a skilled workforce and efforts to attract investors will be essential for sustainable development.

This first draft of the Situational Analysis will be refined with additional information and survey results in subsequent versions, incorporating clear objectives, actions, and an implementation framework.

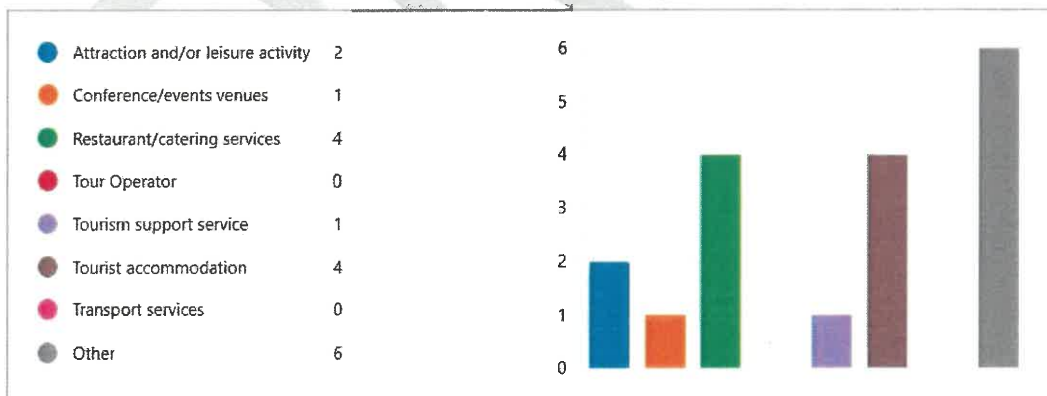
Annexure A

The survey is still open, and we are actively working to increase participation. Currently, the response rate stands at 18, and the following observations can be made regarding the area. Please note that this is just an initial overview, and this section will be updated as we receive more responses.

It is clear to see in the figure below, that the most tourism establishments are in Caledon, Tesselaarsdal and Grayton.



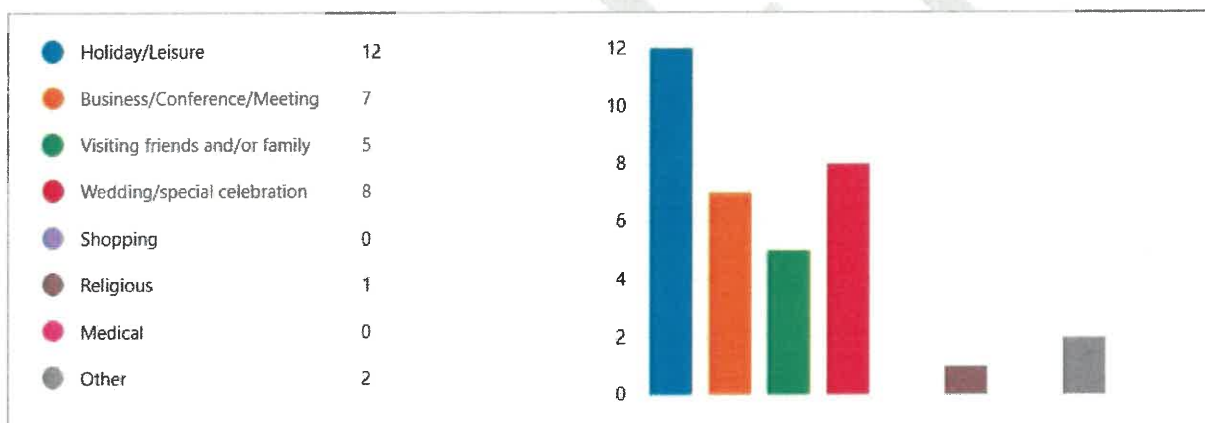
*“Other” is indicated to be the highest in establishment offering, followed by **restaurants/catering services** and **accommodation**. One of the concerns that was raised is that there is not enough tour operators and transport services, which can be seen in the figure below.*



Having 5 to 10 years of experience in tourism in the TWKM is noted as the most common duration.



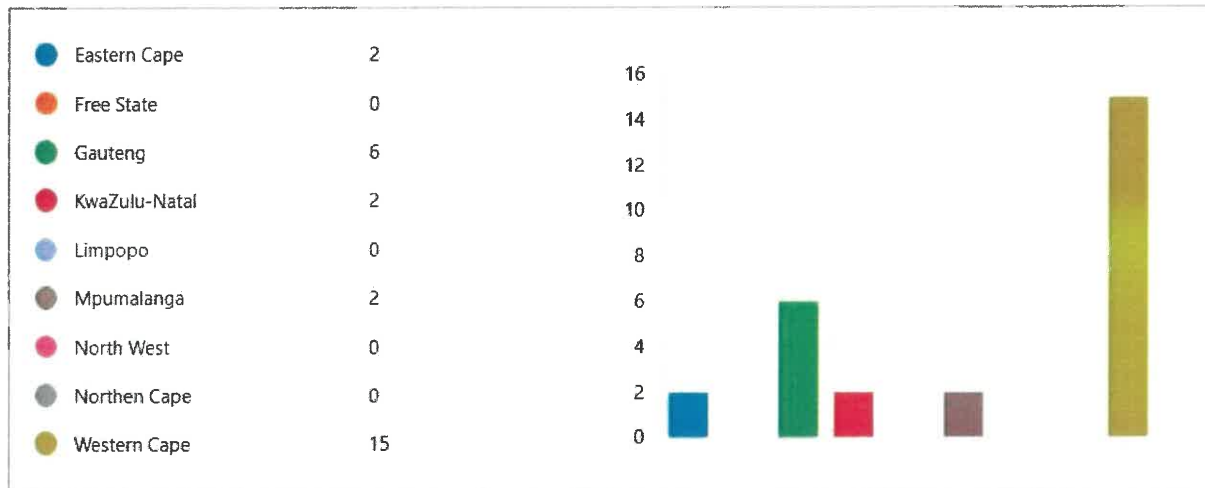
The survey results indicate that **holiday/leisure** are the **primary reasons people visit this area**. Additionally, it is evident that the flourishing **wedding industry** is becoming an **increasingly popular trend** among visitors.



Many of the visitors are **day visitors**.



For the **domestic market**, most of the visitors come from the **Western Cape**.



Visitors most commonly engage in activities such as **events and festivals**, **cuisine experiences**, **cycling**, **hiking**, and **exploring nature and wildlife**.

