

APPENDICES

Appendix A

Tourism Demand Analysis for Focus Areas

FOCUS AREAS - DEMAND ANALYSIS

PILANESBERG-MADIKWE:

Current Demand:

Origin	Preliminary Current Demand				Final Current Demand			
	Overnight	Type of Tourist Day	Total	Source Indicator	Overnight	Type of Tourist Day	Total	Source Indicator
Domestic:	183,900	174,505	358,405	refer below	228,783	178,177	406,959	5
- North West	45,975	139,604	185,579					
- Gauteng	82,755	20,941	103,696	refer below				
- Northern Province	9,195	3,490	12,685	refer below				
- Rest	45,975	10,470	56,445	refer below				
Foreign:	122,600	30,795	153,395	refer below & 8	133,285	57,467	190,752	5
Total estimated tourists to the study area	306,500	205,300	511,800		362,068	235,643	597,711	

Future Demand:

	2002		2003		2004		2005		2006		2007		2008		2009		2010		2011		Growth 2011/2002		Compound Growth pa		Source Indicator	
	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day		
Projected Growth - Without JICA Projects & Programmes:																										
Domestic	0.9%	1.0%	0.9%	1.0%	0.9%	1.0%	0.9%	1.0%	0.9%	1.0%	0.9%	1.0%	0.9%	1.0%	0.9%	1.0%	0.9%	1.0%	0.9%	1.0%					6	
Foreign	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%					6	
Projected Growth - With JICA Projects & Programmes:																										
Domestic	2%	2%	2%	2%	2%	2%	8%	3%	10%	5%	4%	3%	2%	2%	1%	1%	1%	1%	1%	1%					6	
Foreign	2.5%	2.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	8.0%	3.5%	4.0%	3.5%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%					6	
Estimated Resulting Future Demand - Without JICA Projects & Programmes:																										
Domestic	230,842	179,958	232,919	181,758	235,016	183,576	237,131	185,411	239,265	187,265	241,418	189,138	243,591	191,030	245,783	192,940	247,995	194,869	250,227	196,818	8%	9%	1%	1%		
Foreign	125,052	31,411	127,553	32,039	130,104	32,680	132,706	33,333	135,360	34,000	138,068	34,680	140,829	35,374	143,645	36,081	146,518	36,803	149,449	37,539	20%	20%	2%	2%		
Estimated Resulting Future Demand - With JICA Projects & Programmes:																										
Domestic	232,214	180,849	236,859	184,466	241,596	188,156	260,924	193,800	287,016	203,490	298,497	209,595	304,467	213,787	307,511	215,925	310,586	218,084	313,692	220,265	35%	22%	3%	2%		
Foreign	125,665	31,565	130,063	32,670	134,615	33,813	139,327	34,997	150,473	36,221	156,492	37,489	159,622	38,239	162,814	39,004	166,071	39,784	169,392	40,579	35%	29%	3%	3%		
Estimated Difference in Future Demand - With & Without JICA Projects & Programmes:																										
Domestic	1,373	891	3,939	2,708	6,580	4,580	23,793	8,389	47,751	16,225	57,078	20,457	60,875	22,757	61,728	22,985	62,591	23,215	63,465	23,447						
Foreign	613	154	2,510	631	4,511	1,133	6,621	1,663	15,113	2,221	18,425	2,809	18,793	2,865	19,169	2,922	19,552	2,981	19,943	3,041						
Checking validity of projections:																										
Average number of additional domestic visitors to area per day			11	7	18	13	65	23	131	44	156	56	167	62	169	63	171	64	174	64						
Average number of additional foreign visitors to area per day			7	2	12	3	18	5	41	6	50	8	51	8	53	8	54	8	55	8						

Detailed Calculations for Current Demand:

Area	Origin	Type of Tourist			Source Indicator
		Overnight	Day	Total	
Sun City		144,000	100,000	244,000	1
Pilanesberg		155,000	240,000	395,000	1
Madikwe		7,500	1,500	9,000	1
Sub-total		306,500	341,500	648,000	

Accounting for double counting in visitor numbers:

- % of Day visitors visiting all areas				0%	2
- % of Sun City overnight visitors visiting other areas				30%	2
- % of Pilanesberg overnight visitors visiting other areas				60%	2
- % of Madikwe overnight visitors visiting other areas				0%	2

Total estimated visitors to the study area	306,500	205,300	511,800		
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Breakdown by Origin (%):

Domestic:	60%	85%	70%	^{1 = overnight & 2 = day}
- North West	25%	80%	52%	3
- Gauteng	45%	12%	29%	3
- Northern Province	5%	2%	4%	3
- Rest	25%	6%	16%	3
Foreign:	40%	15%	30%	^{1 = overnight & 2 = day}
- Africa			5%	4
- Europe			64%	4
- Australasia			6%	4
- America			14%	4
- Other			11%	4

Breakdown by Origin (numbers):

Domestic:	183,900	174,505	358,405
- North West	45,975	139,604	185,579
- Gauteng	82,755	20,941	103,696
- Northern Province	9,195	3,490	12,685
- Rest	45,975	10,470	56,445
Foreign:	122,600	30,795	153,395
- Africa			7,670
- Europe			98,173
- Australasia			9,204
- Americas			21,475
- Other			16,873
Total	306,500	205,300	511,800

Indication of tourism numbers for the Total North West:

- Number of foreign visitors to North West in 2001	199,697	4
- Number of total domestic visitors to North West in 2000	2,646,606	3
- Number of domestic non-VFR visitors to North West in 2000	897,199	
- Number of total domestic visitors to Rustenberg Tourism Region in 2000	547,847	3
- Number of domestic non-VFR visitors to Rustenberg Tourism Region in 2000	238,861	3

Methodology Description:

Current Demand: Two levels of current demand is provided - (i) preliminary and (ii) final. The preliminary current demand was calculated for the Progress Report 2 and the calculations are based on extrapolation from existing tourism surveys and research. The final current demand is extrapolated directly from the demand identified in the tourism product survey carried out by Africon as part of its Socio-Economic Impact Assessment of Focus Areas.

Future Demand: Two levels of future demand is calculated - (i) the expected future demand should the JICA Study Team's proposed Tourism Development Plan recommendations not be implemented and (ii) the expected future demand should the JICA Study Team's proposed Tourism Development Plan recommendations be implemented. Future demand is calculated using the final current demand as a base and applying annual growth factors (the growth factors are JICA Study Team assumptions). In order to show the impact of this study, the difference in the future demand with and without the JICA Tourism Development Plan recommendations is calculated. Finally the validity or reasonableness of the future demand projections are assessed by considering the number of additional tourists to the area per day.

Source:

1	Heritage Park Concept Plan - Detailed Report
2	JICA Study Team assumption
3	2000 Domestic Tourism Survey Draft Report
4	SA Tourism Foreign Tourist Departure Surveys, various years
5	Africon Socio-Economic Assessment of Focus Areas with JICA Study Team assumptions for adjustment from number of tourism customer nights to number of tourists
6	JICA Study Team assumption - based on combination of South African GDP growth, knowledge of South African tourism growth, Africon Socio-Economic Assessment of Focus Areas tourism demand results & JICA Study Team tourism development recommendations

FOCUS AREAS - CURRENT DEMAND ANALYSIS

KHAYELITSHA:

Current Demand:

Origin	Preliminary Current Demand				Final Current Demand				Source Indicator
	Overnight	Day	Total	Source Indicator	Overnight	Day	Total	Source Indicator	
Domestic:	0	0	0	1	2,950	66,865	69,815	5	
Foreign:	511	6,789	7,300	2	687	11,567	12,254	6	
Total estimated visitors to the study area	511	6,789	7,300		3,637	78,432	82,069	0.850685	

Future Demand:

Projected Growth - Without JICA Projects & Programmes:	2002		2003		2004		2005		2006		2007		2008		2009		2010		2011		Growth 2011/2002		Compound Growth pa	Source Indicator	
	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day			
Domestic	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	7	
Foreign	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	7	
Estimated Resulting Future Demand - Without JICA Projects & Programmes:																									
Domestic	296	6,720	298	6,754	299	6,787	301	6,821	302	6,855	304	6,890	305	6,924	307	6,959	309	6,993	310	7,028					
Foreign	694	11,683	701	11,799	708	11,917	715	12,037	722	12,157	729	12,279	737	12,401	744	12,525	752	12,651	759	12,777	9.4%	9.4%	0.9%	0.9%	
Estimated Future Demand - With JICA Projects & Programmes:																									
Projected Growth in the domestic tourist market to and within Cape Town	3.0%	2.0%	3.0%	2.0%	3.0%	2.0%	3.0%	2.0%	3.0%	2.0%	3.0%	2.0%	3.0%	2.0%	3.0%	2.0%	3.0%	2.0%	3.0%	2.0%	30.5%	19.5%	2.7%	1.8%	7
Resulting number of domestic tourists to and within Cape Town	533,111	1,939,718	549,104	1,978,512	565,577	2,018,082	582,544	2,058,444	600,021	2,099,613	618,021	2,141,605	636,562	2,184,437	655,659	2,228,126	675,329	2,272,688	695,588	2,318,142					7
Projected Growth in the foreign tourist market to Cape Town	5.0%		5.0%		5.0%		5.0%		5.0%		5.0%		5.0%		5.0%		5.0%		5.0%		55.1%		4.5%		7
Resulting number of foreign tourists to Cape Town	763,945		802,143		842,250		884,362		928,580		975,009		1,023,760		1,074,948		1,128,695		1,185,130						7
% Of domestic tourists to and within Cape Town attracted to Khayelitsha	0.7%	2.8%	0.7%	2.8%	0.7%	2.8%	1.0%	3.5%	1.0%	4.5%	1.0%	5.0%	1.0%	5.0%	1.0%	5.0%	1.0%	5.0%	1.0%	5.0%					7
% Of foreign tourists to Cape Town attracted to Khayelitsha	0.2%	2.0%	0.2%	2.0%	0.2%	2.0%	0.7%	7.5%	0.7%	9.0%	0.7%	10.0%	0.7%	10.0%	0.7%	10.0%	0.7%	10.0%	0.7%	10.0%					7
Resulting number of domestic tourists to Khayelitsha	731	7,857	752	8,164	775	8,481	2,837	27,295	2,922	55,042	3,010	70,211	3,100	71,924	3,193	73,681	3,289	75,482	3,388	77,329	363.7%	884.2%	16.6%	25.7%	
Resulting number of foreign tourists to Khayelitsha	1,528	15,279	1,604	16,043	1,684	16,845	6,191	66,327	6,500	83,572	6,825	97,501	7,166	102,376	7,525	107,495	7,901	112,870	8,296	118,513	443.0%	675.7%	18.4%	22.7%	
Estimated Difference in Future Demand - With & Without JICA Projects & Programmes:																									
Domestic	434	1,137	590	3,238	682	4,469	2,816	24,222	2,976	52,930	3,141	69,085	3,311	71,809	3,487	74,602	3,668	77,466	3,855	80,402					
Foreign	834	3,596	903	4,243	976	4,928	5,475	54,291	5,778	71,415	6,096	85,222	6,430	89,975	6,780	94,969	7,149	100,219	7,537	105,736					
Checking validity of projections:																									
Average number of additional domestic visitors to area per day	1	3	2	9	2	12	8	66	8	145	9	189	9	197	10	204	10	212	11	220					
Average number of additional foreign visitors to area per day	2	10	2	12	3	14	15	149	16	196	17	233	18	247	19	260	20	275	21	290					

Indication of tourism numbers in the surrounding areas - for current demand:

<u>Extrapolated number of foreign visitors to destinations in or around Khayelitsha in 2000:</u>		
- Number of visitors to Robben Island	191,709	3
- Number of visitors to Wine Route	479,273	3
- Number of visitors to Western Cape Townships	79,879	3
- Number of visitors to Cape Town	727,567	3
<u>Extrapolated number of domestic visitors to destinations in or around Khayelitsha in 2000:</u>		
- Number of holiday visitors to Winelands as a final destination	55,344	4
- Number of holiday visitors to Cape Metropole as a final destination	517,583	4
<u>Extrapolated number of domestic day visitors to and within the Cape Metropole in 2000:</u>	1,901,684	7

Methodology Description:

Current Demand: Two levels of current demand is provided - (i) preliminary and (ii) final. The preliminary current demand was calculated for the Progress Report 2 and the calculations are based on extrapolation from existing tourism surveys and research. The final current demand is extrapolated directly from the demand identified in the tourism product survey carried out by Africon as part of its Socio-Economic Impact Assessment of Focus Areas.

Future Demand: Two levels of future demand is calculated - (i) the expected future demand should the JICA Study Team's proposed Tourism Development Plan recommendations not be implemented and (ii) the expected future demand should the JICA Study Team's proposed Tourism Development Plan recommendations be implemented. Future demand (without the JICA Study Team recommendations) is calculated using the final current demand as a base and applying annual growth factors (the growth factors are JICA Study Team assumptions). Future demand (with the JICA Study Team recommendations) is calculated based on a share of total Cape Town tourism demand - growth is applied to the current Cape Town tourism demand (growth factors are JICA Study Team assumptions) and a market share for Khayelitsha is then applied to the projected Cape Town demand (market share factors are JICA Study Team assumptions). In order to show the impact of this study, the difference in the future demand with and without the JICA Tourism Development Plan recommendations is calculated. Finally the validity or reasonableness of the future demand projections are assessed by considering the number of additional tourists to the area per day.

Source:

- 1 According to JICA Study Team interviews with local product owners, the domestic tourist market to Khayelitsha is negligible
- 2 JICA Study Team calculation from interviews with local tour operators & product owners
- 3 SA Tourism Foreign Tourist Departure Surveys, various years X foreign air arrivals
- 4 2000 Domestic Tourism Survey Draft Report - indicates only the actual destination of visit and not whether tourists visited other areas whilst staying in one destination, ie going to the winelands for a day whilst staying in Cape Town
- 5 Africon Socio-Economic Assessment of Focus Areas with JICA Study Team assumptions for adjustment from number of tourism customer nights to number of tourists - domestic tourists (day and overnight) primarily in respect of Monwabisi Resort and it is suspected that many day visitors are Khayelitsha residents
- 6 Africon Socio-Economic Assessment of Focus Areas with JICA Study Team assumptions for adjustment from number of tourism customer nights to number of tourists
- 7 JICA Study Team assumption - based on combination of South African GDP growth, knowledge of South African tourism growth, Africon Socio-Economic Assessment of Focus Areas tourism demand results & JICA Study Team tourism development recommendations

FOCUS AREAS - CURRENT DEMAND ANALYSIS

VALLEY OF THE OLIFANTS:

Current Demand:

Origin	Preliminary Current Demand				Final Current Demand			
	Type of Tourist		Total	Source Indicator	Type of Tourist		Total	Source Indicator
	Overnight	Day			Overnight	Day		
Domestic:	108,411	362,298	470,709	refer below	190,343	354,070	544,413	10
- Northern Province	42,064	326,088	368,132	refer below				
- Gauteng	45,533	14,492	60,025	refer below				
- Other	20,815	21,738	42,553	refer below				
Foreign:	48,750	1,250	50,000	refer below & 9	67,245	11,440	78,685	10
Total estimated visitors to the study area	157,161	363,548	520,709		257,587	365,510	623,097	

Future Demand:

	2002		2003		2004		2005		2006		2007		2008		2009		2010		2011		Growth 2011/2002		Compound Growth pa		Source Indicator
	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	
Projected Growth - Without JICA Projects & Programmes:																									
Domestic	1.0%	0.5%	1.0%	0.5%	1.0%	0.5%	1.0%	0.5%	1.0%	0.5%	1.0%	0.5%	1.0%	0.5%	1.0%	0.5%	1.0%	0.5%	1.0%	0.5%					11
Foreign	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%					11
Projected Growth - With JICA Projects & Programmes:																									
Domestic	1.5%	1.5%	3.0%	1.5%	3.0%	1.5%	4.5%	1.5%	4.0%	1.5%	3.0%	1.5%	2.5%	1.5%	2.0%	1.0%	2.0%	1.0%	2.0%	1.0%					11
Foreign	2.0%	2.0%	3.5%	3.5%	3.5%	3.5%	5.0%	5.0%	5.0%	5.0%	5.0%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%					11
Estimated Resulting Future Demand - Without JICA Projects & Programmes:																									
Domestic	192,246	355,840	194,168	357,620	196,110	359,408	198,071	361,205	200,052	363,011	202,052	364,826	204,073	366,650	206,114	368,483	208,175	370,326	210,257	372,177	9.4%	4.6%	0.9%	0.4%	
Foreign	67,917	11,555	68,596	11,670	69,282	11,787	69,975	11,905	70,675	12,024	71,382	12,144	72,095	12,265	72,816	12,388	73,545	12,512	74,280	12,637	9.4%	9.4%	0.9%	0.9%	
Estimated Resulting Future Demand - With JICA Projects & Programmes:																									
Domestic	193,198	359,381	198,994	364,772	204,963	370,243	214,187	375,797	222,754	381,434	229,437	387,155	235,173	392,963	239,876	396,892	244,674	400,861	249,567	404,870	29.2%	12.7%	2.6%	1.2%	
Foreign	68,590	11,669	70,990	12,077	73,475	12,500	77,149	13,125	81,006	13,781	85,056	14,264	88,033	14,763	91,115	15,280	94,304	15,814	97,604	16,368	42.3%	40.3%	3.6%	3.4%	
Estimated Difference in Future Demand - With & Without JICA Projects & Programmes:																									
Domestic	952	3,541	4,825	7,152	8,853	10,836	16,116	14,592	22,702	18,423	27,384	22,330	31,100	26,313	33,763	28,409	36,499	30,536	39,311	32,693					
Foreign	672	114	2,394	407	4,193	713	7,174	1,220	10,331	1,758	13,675	2,120	15,938	2,498	18,298	2,892	20,759	3,302	23,324	3,731					
Checking validity of projections:																									
Average number of additional domestic visitors to area per day	3	10	13	20	24	30	44	40	62	50	75	61	85	72	93	78	100	84	108	90					
Average number of additional foreign visitors to area per day	2	0	7	1	11	2	20	3	28	5	37	6	44	7	50	8	57	9	64	10					

Detailed Calculations for Current Demand:

		Source Indicator
Domestic Overnight Trips:		
Total Domestic Trips taken in South Africa in 2000	33,501,338	1
% to Northern Province	12.9%	1
Total Domestic Trips to Northern Province in 2000	4,330,333	
% Of trips to Valley of the Olifants	19.7%	1
Total Domestic Trips to Valley of the Olifants in 2000	853,076	
Purpose of Visit of Trips to Valley of the Olifants:	100.0%	
Leisure/Holiday	18.8%	1
Business	2.7%	1
VFR	63.0%	1
Health	1.1%	1
Religion	14.4%	1
Total Relevant Domestic Tourist Trips to Valley of the Olifants	183,411	2
Number of estimated trips to Tzaneen	75,000	3
Number of relevant domestic trips to rest of Valley of the Olifants, ie study area	108,411	
Origin:		
- Northern Province	38.8%	1
- Gauteng	42.0%	1
- Other	19.2%	1
Domestic Day Trips:		
Number of day trips to the Valley of the Olifants	798,396	1
Total number of day trips taken to Tzaneen	436,098	4
Total number of day trips to the rest of the Valley of the Olifants area, ie study area	362,298	
Origin:		
- Northern Province	98.0%	1
- Gauteng	4.0%	1
- Other	6.0%	1
Foreign Visitors:		
Extrapolated number of visitors to destinations in or around Valley of the Olifants in 2000:		
- Number of visitors to Tzaneen	12,781	5
- Number of visitors to Blyde River Canyon	143,782	5
- Number of visitors to Northern Province private game reserves adjacent to Kruger Park	27,159	6
- Number of visitors to Kruger using northern gates, ie Phalaborwa, Punda Maria & Orpen	47,927	7
Total estimated number of foreign tourists to the Valley of the Olifants, study area	50,000	8

Indication of tourism numbers for the Total Northern Province:

- Number of foreign visitors to Northern Province in 2000	111,830	5
- Number of total domestic visitors to Northern Province in 2000	4,330,333	1
- Number of domestic non-VFR visitors to Northern Province in 2000	2,208,470	1
- Number of domestic holiday visitors to Northern Province in 2000	697,184	1
- Number of total domestic visitors to Valley of the Olifants Tourism Region in 2000	853,076	1
- Number of domestic non-VFR visitors to Valley of the Olifants Tourism Region in 2000	315,638	1

Methodology Description:

Current Demand: Two levels of current demand is provided - (i) preliminary and (ii) final. The preliminary current demand was calculated for the Progress Report 2 and the calculations are based on extrapolation from existing tourism surveys and research. The final current demand is extrapolated directly from the demand identified in the tourism product survey carried out by Africon as part of its Socio-Economic Impact Assessment of Focus Areas.

Future Demand: Two levels of future demand is calculated - (i) the expected future demand should the JICA Study Team's proposed Tourism Development Plan recommendations not be implemented and (ii) the expected future demand should the JICA Study Team's proposed Tourism Development Plan recommendations be implemented. Future demand is calculated using the final current demand as a base and applying annual growth factors (the growth factors are JICA Study Team assumptions). In order to show the impact of this study, the difference in the future demand with and without the JICA Tourism Development Plan recommendations is calculated. Finally the validity or reasonableness of the future demand projections are assessed by considering the number of additional tourists to the area per day.

Source:

- 1 2000 Domestic Tourism Survey Draft Report
- 2 JICA Study Team assumption - for purposes of this study ignore VFR, Health and Religion
- 3 2000 Domestic Tourism Survey Draft Report - 10% of All Business Trips to Northern Province to Tzaneen & 10% of all Leisure Trips to Northern Province to Tzaneen
- 4 2000 Domestic Tourism Survey Draft Report - 14% of South Africa's 20,9 million day trips to Northern Province and 14,9% of those to Tzaneen
- 5 SA Tourism Foreign Tourist Departure Surveys, various years X foreign air arrivals
- 6 SA Tourism Foreign Tourist Departure Surveys, various years X foreign air arrivals - majority of private reserves located around Hoedspruit
- 7 SA Tourism Foreign Tourist Departure Surveys, various years X foreign air arrivals - Phalaborwa & Orpen more used than Punda Maria
- 8 JICA Study Team assumption - the SA Tourism Foreign Tourist Departure Surveys do not mention Subject Area, for this reason the estimation is based on an assessment of foreign tourist numbers attracted to surrounding or closely located destinations and making an informed and realistic deduction for the Subject Area taking into consideration its current product offering and the marketing thereof to foreign tourists - Note this includes day & overnight visitors
- 9 JICA Study Team assumption for breakdown between day and overnight
- 10 Africon Socio-Economic Assessment of Focus Areas with JICA Study Team assumptions for adjustment from number of tourism customer nights to number of tourists
- 11 JICA Study Team assumption - based on combination of South African GDP growth, knowledge of South African tourism growth, Africon Socio-Economic Assessment of Focus Areas tourism demand results & JICA Study Team tourism development recommendations

FOCUS AREAS - CURRENT DEMAND ANALYSIS

BARBERTON:

Current Demand:

Origin	Preliminary Current Demand				Final Current Demand			
	Type of Tourist Overnight	Type of Tourist Day	Total	Source Indicator	Type of Tourist Overnight	Type of Tourist Day	Total	Source Indicator
Domestic:	22,256	20,906	43,162	refer below	79,924	24,445	104,369	s
- Mpumalanga	7,077	16,390	23,468	refer below				
- Gauteng	9,325	836	10,161	refer below				
- Northern Province	2,737	2,571	5,309	refer below				
- Other	3,116	1,108	4,224	refer below				
Foreign:	9,750	250	10,000	refer below & s	16,419	6,451	22,870	s
Total estimated visitors to the study area	32,006	21,156	53,162		96,343	30,896	127,238	

s

Future Demand:

	2002		2003		2004		2005		2006		2007		2008		2009		2010		2011		Growth 2011/2002		Compound Growth pa	Source Indicator	
	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight	Day	
Projected Growth - Without JICA Projects & Programmes:																									
Domestic	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	9
Foreign	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	9
Projected Growth - With JICA Projects & Programmes:																									
Domestic	2.0%	2.0%	3.8%	3.5%	22.5%	16.0%	30.0%	20.0%	20.0%	10.0%	15.0%	7.5%	7.5%	5.0%	5.0%	3.5%	3.0%	2.5%	3.0%	2.5%					9
Foreign	2.5%	2.5%	5.0%	5.0%	12.5%	15.0%	15.0%	15.0%	10.0%	10.0%	7.5%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%					9
Estimated Resulting Future Demand - Without JICA Projects & Programmes:																									
Domestic	80,324	24,567	80,725	24,690	81,129	24,813	81,534	24,937	81,942	25,062	82,352	25,187	82,764	25,313	83,177	25,440	83,593	25,567	84,011	25,695	4.6%	4.6%	0.4%	0.4%	
Foreign	16,583	6,516	16,749	6,581	16,916	6,647	17,085	6,713	17,256	6,780	17,429	6,848	17,603	6,917	17,779	6,986	17,957	7,056	18,136	7,126	9.4%	9.4%	0.9%	0.9%	
Estimated Resulting Future Demand - With JICA Projects & Programmes:																									
Domestic	81,522	24,934	84,580	25,806	103,610	29,935	134,693	35,922	161,632	39,515	185,876	42,478	199,817	44,602	209,808	46,163	216,102	47,317	222,585	48,500	173.0%	94.5%	10.6%	6.9%	
Foreign	16,829	6,613	17,670	6,943	19,879	7,985	22,861	9,182	25,147	10,101	27,033	10,606	28,385	11,136	29,804	11,693	31,294	12,277	32,859	12,891	95.3%	95.0%	6.9%	6.9%	
Estimated Difference in Future Demand - With & Without JICA Projects & Programmes:																									
Domestic	1,199	367	3,854	1,117	22,481	5,122	53,158	10,985	79,689	14,453	103,524	17,291	117,053	19,289	126,630	20,723	132,509	21,750	138,574	22,805					
Foreign	246	97	922	362	2,963	1,338	5,776	2,469	7,891	3,320	9,605	3,757	10,782	4,219	12,025	4,707	13,338	5,222	14,723	5,765					
Checking validity of projections:																									
Average number of additional domestic visitors to area per day	3	1	11	3	62	14	146	30	218	40	284	47	321	53	347	57	363	60	380	62					
Average number of additional foreign visitors to area per day	1	0	3	1	8	4	16	7	22	9	26	10	30	12	33	13	37	14	40	16					

Detailed Calculations for Current Demand:

		Source Indicator
Domestic Overnight Trips:		
Total Domestic Trips taken in South Africa in 2000	33,501,338	1
% to Mpumalanga	5.7%	1
Total Domestic Trips to Mpumalanga in 2000	1,913,403	
% Of trips to Wild Frontier Tourist Region	8.1%	1
Total Domestic Trips to Wild Frontier in 2000	154,986	
Purpose of Visit of Trips to Wild Frontier:	100.0%	
Leisure/Holiday	34.4%	1
Business	1.5%	1
VFR	42.2%	1
Health	1.2%	1
Religion	20.7%	1
Total Relevant Domestic Tourist Trips to Wild Frontier in 2000	55,640	2
% Of Wild Frontier tourist trips represented by greater Barberton area, ie Subject Area	40.0%	3
Number of estimated domestic trips to Greater Barberton Area, ie Subject Area	22,256	
Origin:		
- Mpumalanga	31.8%	1
- Gauteng	41.9%	1
- Northern Province	12.3%	1
- Other	14.0%	1
Domestic Day Trips:		
Number of day trips to Mpumalanga	2,090,594	1
% Of total Mpumalanga day trips represented by greater Barberton area, ie Subject Area	1.0%	4
Total number of day trips to the rest of the greater Barberton area, ie Subject Area	20,906	
Origin:		
- Mpumalanga	78.4%	1
- Gauteng	4.0%	1
- Northern Province	12.3%	1
- Other	5.3%	1
Foreign Visitors:		
<u>Extrapolated number of visitors to destinations in or around Barberton in 2000:</u>		
- Number of visitors to Blyde River Canyon	143,782	5
- Number of visitors to southern gates of Kruger National Park	223,661	5
- Number of visitors to Swaziland	130,196	6
Total estimated number of foreign tourists to the greater Barberton area, ie Subject Area	10,000	7

Indication of tourism numbers for the Total Mpumalanga Province:

- Number of foreign visitors to Mpumalanga Province in 2000	399,395	5
- Number of total domestic visitors to Mpumalanga in 2000	1,913,403	1
- Number of domestic non-VFR visitors to Mpumalanga in 2000	935,654	1
- Number of domestic holiday visitors to Mpumalanga in 2000	493,658	1
- Number of total domestic visitors to Wild Frontier Tourism Region in 2000	154,986	1
- Number of domestic non-VFR visitors to Wild Frontier Tourism Region in 2000	89,582	1

Methodology Description:

Current Demand: Two levels of current demand is provided - (i) preliminary and (ii) final. The preliminary current demand was calculated for the Progress Report 2 and the calculations are based on extrapolation from existing tourism surveys and research. The final current demand is extrapolated directly from the demand identified in the tourism product survey carried out by Africon as part of its Socio-Economic Impact Assessment of Focus Areas.

Future Demand: Two levels of future demand is calculated - (i) the expected future demand should the JICA Study Team's proposed Tourism Development Plan recommendations not be implemented and (ii) the expected future demand should the JICA Study Team's proposed Tourism Development Plan recommendations be implemented. Future demand is calculated using the final current demand as a base and applying annual growth factors (the growth factors are JICA Study Team assumptions). In order to show the impact of this study, the difference in the future demand with and without the JICA Tourism Development Plan recommendations is calculated. Finally the validity or reasonableness of the future demand projections are assessed by considering the number of additional tourists to the area per day.

Source:

- 2000 Domestic Tourism Survey Draft Report
- JICA Study Team assumption - for purposes of this study ignore VFR, Health and Religion
- JICA Study Team assumption - based on an assessment of the Subject Area product offering & marketing thereof to domestic tourists compared to other areas within the Wild Frontier Region, such as Nkomazi, Konaalpoort, Badplaza, etc
- JICA Study Team assumption - based on an assessment of the breakdown provided of destinations for and origin of Mpumalanga day trips in 2000 Domestic Tourism Survey Draft Report as well as an assessment of how Subject Area compares in terms of its domestic day visitor product offering against other day destinations in Mpumalanga as well as the subject area's location for domestic day visitors
- SA Tourism Foreign Tourist Departure Surveys, various years X foreign air arrivals
- SA Tourism Foreign Tourist Departure Surveys, various years X overseas arrivals
- JICA Study Team assumption - the SA Tourism Foreign Tourist Departure Surveys do not mention Barberton, for this reason the estimation is based on an assessment of foreign tourist numbers attracted to surrounding or closely located destinations and making an informed and realistic deduction for the Subject Area taking into consideration its current product offering and the marketing thereof to foreign tourists - Note this includes day & overnight visitors
- Africon Socio-Economic Assessment of Focus Areas with JICA Study Team assumptions for adjustment from number of tourism customer nights to number of tourists
- JICA Study Team assumption - based on combination of South African GDP growth, knowledge of South African tourism growth, Africon Socio-Economic Assessment of Focus Areas tourism demand results & JICA Study Team tourism development recommendations
- JICA Study Team Tourism Development Recommendations

Appendix B

Product/Market Assessment for Focus Areas

FOCUS AREAS - PRODUCT/MARKET IDENTIFICATION & POTENTIAL ALLOCATION

MADIKWE-PILANESBERG - Current:

PRODUCT	Comment	Markets															
		Domestic Holiday				Domestic Business		Domestic VFR		Domestic Day Visitor				Foreign			MICE
		LSM1-6 Primary Domestic	LSM7-8 Primary Domestic	LSM1-6 Secondary Domestic	LSM7-8 Secondary Domestic	All LSMs Primary	All LSMs Secondary	All LSMs Primary	All LSMs Secondary	LSM1-5 (Local surrounding)	LSM6-8 (Local surrounding)	All LSMs Primary	All LSMs Secondary	Holiday	Business	VFR	(Foreign & Domestic)
Game Reserve/Wildlife: Luxury/Personalised - Pilanesberg - Madikwe Upmarket (Large Hotel/Timeshare) - Pilanesberg Budget (Camping/Chalet) - Pilanesberg Game viewing - Pilanesberg Recreation/Entertainment: Sun City Pilanesberg Camp Picnic/Resort Experience MICE: Sun City Pilanesberg																	

MADIKWE-PILANESBERG - Future:

Game Reserve/Wildlife: Luxury/Personalised - Pilanesberg - Madikwe Upmarket (Large Hotel/Timeshare) - Pilanesberg Budget (Camping/Chalet) - Pilanesberg Game viewing - Pilanesberg Midmarket family orientated resort Wildlife breeding centre Recreation/Entertainment: Sun City Pilanesberg Camp Picnic/Resort Experience Midmarket water-based resort & recreation area Heritage/Culture: Food, shopping, museums, cultural interpretation Youth cultural exchange centre MICE: Sun City Pilanesberg																		
---	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

DOMESTIC MARKET INDICATORS:

Province	Domestic Market			
	Holiday	Business	VFR	Day
Eastern Cape				
Free State				
Gauteng				
KwaZulu-Natal				
Mpumalanga				
Northern Province				
Northern Cape				
North West				
Western Cape				

Primary = [Pattern] Secondary = [Pattern]

CURRENT MARKET INDICATORS:

- [Dark Grey Box] = Major source market
- [Medium Grey Box] = Average source market
- [Light Grey Box] = Low source market
- [White Box] = Not a source market

FUTURE MARKET PENETRATION POTENTIAL INDICATORS:

- [Dark Grey Box] = High
- [Medium Grey Box] = Medium to High
- [Light Grey Box] = Medium/Average
- [White Box] = Low to Medium
- [White Box] = Low
- [White Box] = None

FOCUS AREAS - PRODUCT/MARKET IDENTIFICATION & POTENTIAL ALLOCATION

KHAYELITSHA - Current:

PRODUCT	Comments	Markets													MICE (Foreign & Domestic)				
		Domestic Holiday				Domestic Business		Domestic VFR		Domestic Day Visitor			Foreign						
		LSM1-6 Primary Domestic	LSM7-8 Primary Domestic	LSM1-6 Secondary Domestic	LSM7-8 Secondary Domestic	All LSMs Primary	All LSMs Secondary	All LSMs Primary	All LSMs Secondary	LSM1-5 (Local surrounding)	LSM6-8 (Local surrounding)	All LSMs Primary	All LSMs Secondary	Holiday		Business	VFR		
Township Life Drive Through Tours																Major source but very low base			
Township Tavern/Shebeen Evenings																Major source but very low base			
Township Music/Jazz Evenings																Major source but very low base			
Township Overnight Experience																Major source but very low base			

All markets for this Focus Areas are in respect of tourism to the greater Cape Town

KHAYELITSHA - Future:

Township Life Drive Through Tours			L									L			M			L	
Township Tavern/Shebeen Evenings			L												M			L	
Township Music/Jazz Evenings			L									M			M			L	
Township Overnight Experience															L				
African Music & Dance Showcase:																			
Music shows & events			M			L for evening entertainment		L-M				M-H			M-H	L for evening entertainment		L	M for add on events
Music interpretation centre/museum			M					L-M				M-H			M-H			L	
Arts, Crafts & merchandising training & distribution centre			M					L-M				M			M			L	
Music training centre of resident troupe & others			L												M				

DOMESTIC MARKET INDICATORS:

Province	Domestic Market			
	Holiday	Business	VFR	Day
Eastern Cape				
Free State				
Gauteng				
KwaZulu-Natal				
Mpumalanga				
Northern Province				
Northern Cape				
North West				
Western Cape				

Primary = Secondary =

CURRENT MARKET INDICATORS:

- = Major source market
- = Average source market
- = Low source market
- = Not a source market

FUTURE MARKET PENETRATION POTENTIAL INDICATORS:

- = High
- = Medium to High
- = Medium/Average
- = Low to Medium
- = Low
- = None

FOCUS AREAS - PRODUCT/MARKET IDENTIFICATION & POTENTIAL ALLOCATION

SOUTH-EAST VALLEY OF THE OLIFANTS - Current:

PRODUCT	Comments	Markets													MICE (Foreign & Domestic)				
		Domestic Holiday				Domestic Business		Domestic VFR		Domestic Day Visitor				Foreign					
		LSM1-6 Primary Domestic	LSM7-8 Primary Domestic	LSM1-6 Secondary Domestic	LSM7-8 Secondary Domestic	All LSMs Primary	All LSMs Secondary	All LSMs Primary	All LSMs Secondary	LSM1-5 (Local surrounding)	LSM6-8 (Local surrounding)	All LSMs Primary	All LSMs Secondary	Holiday		Business	VFR		
Game Reserve/Wildlife: Entry to Kruger National Park Private lodges Research/education (cheetah centre, reptile park)			■										■						

SOUTH EAST VALLEY OF THE OLIFANTS - Future:

Game Reserve/Wildlife: Entry to Kruger National Park			M								L-M		L-M	L											
Private lodges			M																						L - add on tours to wildlife MICE elsewhere in SA & hosting of wildlife research specific MICE
Research/education (cheetah centre, reptile park)			M-H																						L - add on tours to wildlife MICE elsewhere in SA & hosting of wildlife research specific MICE
Wildlife Research & Education Interpretation & Visitor Centre			H																						L - add on tours to wildlife MICE elsewhere in SA & hosting of wildlife research specific MICE
Wildlife Research & Education Tourist Route (WR&ETR)			H																						L - add on tours to wildlife MICE elsewhere in SA & hosting of wildlife research specific MICE
WR&ETR Crafts, Curios & Merchandising			M																						L - add on tours to wildlife MICE elsewhere in SA & hosting of wildlife research specific MICE

DOMESTIC MARKET INDICATORS:

Province	Domestic Market			
	Holiday	Business	VFR	Day
Eastern Cape	■	■	■	■
Free State	■	■	■	■
Gauteng	■	■	■	■
KwaZulu-Natal	■	■	■	■
Mpumalanga	■	■	■	■
Northern Province	■	■	■	■
Northern Cape	■	■	■	■
North West	■	■	■	■
Western Cape	■	■	■	■

Primary = ■ Secondary = ■

CURRENT MARKET INDICATORS:

- = Major source market
- = Average source market
- = Low source market
- = Not a source market

FUTURE MARKET PENETRATION POTENTIAL INDICATORS:

- H = High
- M-H = Medium to High
- M = Medium/Average
- L-M = Low to Medium
- L = Low
- = None

FOCUS AREAS - PRODUCT/MARKET IDENTIFICATION & POTENTIAL ALLOCATION

BARBERTON - Current:



PRODUCT	Comment	Markets															
		Domestic Holiday				Domestic Business		Domestic VFR		Domestic Day Visitor				Foreign		MICE (Foreign & Domestic)	
		LSM1-6 Primary Domestic	LSM7-8 Primary Domestic	LSM1-6 Secondary Domestic	LSM7-8 Secondary Domestic	All LSMs Primary	All LSMs Secondary	All LSMs Primary	All LSMs Secondary	LSM1-5 (Local surrounding)	LSM6-8 (Local surrounding)	All LSMs Primary	All LSMs Secondary	Holiday	Business		VFR
Game Reserve/Wildlife: Midmarket - Songimvelo			very low base														
Barberton - History Experience																	
Barberton - Scenic Experience																	

BARBERTON - Future:





Game Reserve/Wildlife: Midmarket/small lodge - Songimvelo			H		L									L-M		M	M - iro teambuilding only
- Mountainlands			H		L									L-M		M	M - iro teambuilding only
Midmarket - family resort - Mountainlands			H		L-M											M	
Upmarket - small lodge - Songimvelo			M		L									L-M		L	
Rhino spotting - Songimvelo			M		L									M		L	M - iro teambuilding only
Mountainous terrain & Adventure Theme			H		L-M						M			M		L	
Adventure: Soft: Mountain Hiking, mountain biking, quad biking, 4x4			H		M			L			M			M		M	M - iro teambuilding only
Hard: Rock Climbing, abseiling, paragliding, professional 4x4			M		M			L						L-M			
Cable way adventure products			M		M			L			M			M		L	
Scenic Drive Link to Swaziland: Swazi & other local arts & craft shopping route			M		L			L			M			M		M	
Swazi culture/heritage interpretation route																	
Cable way scenic products																	
Special Interest: History - gold mining			L-M		L			L						M		L	
Geology			L		L									L			M - linked to geology specific MICE in SA

DOMESTIC MARKET INDICATORS:







Province	Domestic Market			
	Holiday	Business	VFR	Day
Eastern Cape				
Free State				
Gauteng				
KwaZulu-Natal				
Mpumalanga				
Northern Province				
Northern Cape				
North West				
Western Cape				

Primary =  Secondary = 

CURRENT MARKET INDICATORS:

	=	Major source market
	=	Average source market
	=	Low source market
	=	Not a source market

FUTURE MARKET PENETRATION POTENTIAL INDICATORS:

	=	High
	=	Medium to High
	=	Medium/Average
	=	Low to Medium
	=	Low
	=	None

Appendix C

Tourism Resource Lists for Focus Areas

Pilanesburg-Madikwe Focus Area

ACCOMMODATION:

Name of Establishment	Accommodation Type	Location
Upmarket		
Kwa Maritane	hotel	Pilanesberg
Bakubung	hotel	Pilanesberg
Tshukudu Bush Lodge	hotel	Pilanesberg
Lost City	hotel	Sun City
Sun City Hotel	hotel	Sun City
Sun City Cascades	hotel	Sun City
Madikwe river lodge	game lodge	Madikwe
Tau Game Lodge	game lodge	Madikwe
Jaci's Safari Lodge	game lodge	Madikwe
Mid-market		
Manyane	units, camping	Pilanesberg
Bosele	dormitories	Pilanesberg
Mankwe Camp	units, camping	Pilanesberg
Kololo Camp	camping	Pilanesberg
Bakgatlha	units, camping	Pilanesberg
Metswedi Camp	fixed tents	Pilanesberg
Nare Camp	fixed tents	Pilanesberg
Sun City Cabanas	hotel	Sun City
Time share units	units	Sun City
Budget market		
Lebathlane Game Reserve	Hunting lodge	Saulspoort
Leisure farms	Farm house	Boshoek
Kamogelo Guest house	Guest house	Mogwase
Cecilia's Guest house	Guest house	Mogwase
Ramoriana safari camp	fixed tents	Molatedi dam

ATTRACTIONS:

Name of Attraction	Type of Attraction	Location
Sun City entertainment and sports facilities	Casinos, shows, theatre, retail, cinemas, valley of waves, nature trails, game drives, water sports, water rides, golf course, tennis courts, etc	Sun City Complex
Sun City Botanical Gardens	Tours	Sun City Complex
Moruleng Heritage Centre	Museum	Manyane gate
Mogwase craft factory	Craft/curio centre	Mogwase
Kwena Gardens Crocodile farm	Crocodile viewing	Sun City Complex
Struthio Ostrich Farm	Ostrich viewing	Boshoek (close to Pilanesberg)
SA Birds of Prey Centre	Falconering	Sun City Complex
Gaditshwene Traditional Village	Traditional Batswana village	Lehurutshe
Saulspoort recreation area	swimming pool, braai facilities	Saulspoort
Bontle bo Kwano	Traditional cuisine restaurant	Moruleng
Clay animals	Local arts	Moruleng

TOUR OPERATORS:

Name of Tour Operator

Mankwe Heritage Safaris

Mahube Tours & Safaris

Bundu Expedition

Bosele Tourism Services

Kgama Safaris

Marico Bosveld Toere

Mahube Tours & Safaris

Khayelitsha Focus Area

ACCOMMODATION:

Name of Establishment	Accommodation Type	Location
Vicki's	Bed and Breakfast	Site C, Khayelitsha
Kopanong	Bed and Breakfast	Site C, Khayelitsha

TAVERNS AND RESTAURANTS:

Name of Establishment	Restaurant Type	Location
Taverns		
Pat's Tavern	Tavern	Informal taverns and restaurants are situated throughout Khayelitsha
Winnie's Tavern	Tavern	
Waterfront Tavern	Tavern	
Bong's Tavern	Tavern	
Lulu's Tavern	Tavern	
Restaurants		
Igugu le Africa	African Traditional	
Zanokhanyo	African Traditional	
Maria's	African Traditional	

ATTRACTIONS:

Name of Attraction	Type of Attraction	Location
Mew Way Boxing/ Exhibition Hall	Sport and Events	along the N2, close to Mfuleni south-east corner of the intersection of Spine and Mew Way roads
Lookout Hill	Arts and Crafts/ Museum/ African Culture	close to Ntlazane Road
Khayelitsha Craft Market	Arts and Crafts	Baden Powell Drive
Baboon Man Sculptor	Arts and Crafts	cnr of Pine and Lwandle Roads
Khayelitsha Training Centre	Arts and Crafts Training	False Bay Coast
Monwabisi Resort	Sun, Sea and Sand	throughout the township
Taverns and Restaurants	African Culture	throughout the township
Bed and Breakfast Establishments	African Culture	throughout the township
Traditional Healers	African Culture	intersection of Lansdowne Road and Steve Biko Road
Zenele Training Centre	Sewing Skills Training Centre	
Other Facilities		
Khayelitsha Stadium	Sport and Events	Baden Powell Drive, close to Monwabisi Resort

Valley of the Olifants Focus Area

ACCOMMODATION:

Name of Establishment	Accommodation Type	Location
Cheetah Inn	Hotel/ Motel	30kms outside of Hoedspruit
Fort Copeiba	Hotel/ Motel	Hoedspruit
Assupol Lodge	Guest House	Hoedspruit
Buffalo Lodge	Guest House	in the Klaserie Private Nature Reserve
Chapunga Game Lodge	Guest House	Hoedspruit
Blue Cottages	Guest House	Hoedspruit on the R527 near Hoedspruit
Emoyeni Guest House	Guest House	R531 28km from Hoedspruit on way to Orpen Gate
Fleur de Lys Chalets	Self-Catering	Hoedspruit 40kms from the Orphen Gate, 16kms from Eastgate airport
GwalaGwala	tented camp lodge	Hoedspruit near the Orpen Gate
Hamerkop Nest	Self-Catering tented camp	22kms from Hoedspruit on Blyde River
Hippo Pools	Self-catering holiday resort	20kms north of Hoedspruit
Hunters Lodge	Bed and Breakfast	in Hoedspruit
Ingwe Game Lodge	Lodge	Hoedspruit
Jackalberry Lodge	Lodge	Hoedspruit within the Thornybush Game Reserve
Jacob's Creek	Lodge and Self-Catering	Hoedspruit
Kambaku Lodge	Lodge	in Timbavati 30kms from Hoedspruit
Kapama Lodge	fully inclusive 5 star Lodge	close to Hoedspruit
Khoka Moya	safari lodge	in Manyeleti Game Reserve near the Orpen Gate
Kings Camp	Lodge	in Timbavati Game Reserve, adjacent to KNP
Kwa-Mbili Game Lodge	Lodge	Hoedspruit in the Thornybush Nature Reserve
Kwa-Thabeng	Guest House	Hoedspruit
Loerie Guest House	Guest House	Hoedspruit in the town
Maduma Boma	Self-catering chalets	30km's from the Orpen Gate
Marc's Camp	Lodge	Hoedspruit
Matumi Game Lodge and Bush Camp	Lodge	Hoedspruit in the foothills of the Drakensberg, 35km's from Hoedspruit
Mohlabetsi Safari Lodge	Lodge	17kms out of Hoedspruit on way to Phalaborwa
Nyati Tau	Lodge	Hoedspruit
Off Beat Safari Camp	Lodge/Self-catering and fully inclusive	north of Hoedspruit
Otters Den	Lodge	15kms out of town, between Hoedspruit and Strydom Tunnel
Patrick's Trail Camp	Lodge/self-catering	Hoedspruit
Pezula Treehouse	Lodge/self-catering	Hoedspruit
Pungwe Safari Camp	Lodge/self-catering	Hoedspruit
Sorabi Rock Lodge	Lodge	Hoedspruit
Tanda Tula Bush Camp	Lodge/self-catering and fully inclusive	Hoedspruit
Thornybush	Lodge/self-catering and fully inclusive	Hoedspruit
Tintshaba Lodge	Lodge	Hoedspruit
Trackers	Lodge/self-catering	Hoedspruit
Tremisana Game Lodge	Lodge	on Balule 17kms outside of

Name of Establishment	Accommodation Type	Location
Thsukudu Bush Camp/ Game Lodge	Lodge	Hoedspruit Hoedspruit
Impala Protea Inn	Hotel/ Motel	Phalaborwa on the edge of the Phalaborwa CBD 2 minutes away from the KNP
Lantana Hotel	Hotel	Halls Street Phalaborwa
Augusta Palms	Bed and Breakfast	Phalaborwa Augusta Crescent
Beverly Hills	Guest House	Phalaborwa near the Kruger National Park gate, the airport and Hans Merensky Country Club
Billy's Cottage	Self-Catering	Phalaborwa Grosvener Street
Bush Camp Phalaborwa	Camp/self-catering	Phalaborwa adjacent to the Kruger National Park
Bushveld Tavern Hotel	Hotel	Phalaborwa Mica Road
Daan and Zena's	Bed and Breakfast	Phalaborwa Birkenhead Street
Darisandi Game Lodge	Lodge	Phalaborwa
Elegance Guest House	Guest House	Phalaborwa Red Ivory Road
Elephant Walk Accommodation and Tours	Self-Catering	Phalaborwa Anna Scheepers Ave
Executive Guest House	Guest House	Phalaborwa close the Kruger National Park and the Hans Merensky Golf Course
Hans Merensky Country Club	Hotel	Phalaborwa
Hippo Lodge Mfubu	Lodge	Phalaborwa on the banks of the Olifants River in the Balule Nature Reserve
Lantana Lodge and Caravan Park	Self-Catering	Phalaborwa 3kms from the Phalaborwa Gate of the Kruger National Park
Loerie Lodge	Bed and Breakfast	Phalaborwa Troupand Crescent
Maroela Hut	Bed and Breakfast	Phalaborwa in town
Masorini Lodge	Lodge	Phalaborwa
Matomani Lodge	Lodge	corner of Selati and Essenhout Roads in Phalaborwa
Ngonyama	Guest House	Phalaborwa Molengraaf Street
Raintree Cottage	Bed and Breakfast	Phalaborwa Essenhout Street
Royal Game Guest House	Guest House	Phalaborwa Essenhout Street
Sefapane Lodge and Safaris	Lodge	Phalaborwa 1km from the central gate of the Kruger National Park
Selati Lodge	Lodge	Gravelotte
Selati River Ruins	Self-Catering	Phalaborwa 30km from the Phalaborwa and the KNP on the R71 route
Serapa Guest Room	Guest House	Phalaborwa
Tamboti	Guest House	Phalaborwa Tambotie Street
The Contractors House	Self-Catering	Phalaborwa Birkenhead Street
The Owl House	Self-Catering	Phalaborwa adjacent to Kruger National Park
Tulani Safari Lodge	Lodge	Phalaborwa at Balule Game Reserve
Lantan Caravan Park	Caravan and Camping	Phalaborwa
Olifants River Caravan Park	Caravan and Camping	Phalaborwa along the Olifants River
Uncle Tom's	Bed and Breakfast	Phalaborwa Bosvlier Street

ATTRACTIONS:

Activity	Type of Activity	Location
Nature		
Selati Game Reserve	Game Reserve/ Nature Orientated Tourism	bordered in the north by the R71, in the west by the R526 and in the southeast by the R40
Phuza Moya Private Game Reserve	Game Reserve/ Nature Orientated Tourism	on the confluence of the Olifants and Blyde Rivers
Thukudu Game Reserve	Game Reserve/ Nature Orientated Tourism	south of Balule Nature Reserve, west of the R40
Blyde Olifants Conservancy	Nature Orientated Tourism	between the R526 and the R40 adjacent to the Balule and Tshukudu Reserves
Timbavati Game Reserve	Game Reserve/ Nature Orientated Tourism	adjacent to the Kruger National Park
Klaserie Nature Reserve	Nature Orientated Tourism	between Timbavati Game Reserve and Balule Nature Reserve, south of the Phalaborwa Gate
Blyde River Canyon Nature Reserve	Nature Orientated Tourism	between the R36 and R531
Cleveland Nature Reserve	Nature Orientated Tourism	south of the Phalaborwa Gate adjacent to the Kruger National Park
Manyeleti Game Reserve	Game/ Nature Orientated Tourism	south of the Orpen Gate adjacent to the Kruger National Park
Makalali Game Reserve	Game/ Nature Orientated Tourism	between the R36 and the R526
Letaba Ranch	Game/ Nature Orientated Tourism	Gravelotte
Umbabat Nature Reserve	Nature Orientated Tourism	north of the Timbavati Game Reserve
Jacob's Creek Game Farm	Game/ Nature Orientated Tourism	Hoedspruit
Balule Nature Reserve	Nature Reserve/ Nature Orientated Tourism	Phalaborwa on the banks/ close to the Olifants River south of the R40, east of the R526
Arts and Crafts		
Don's Woodcraft	Arts and crafts	Coster Lane Phalaborwa
Lemon Tree Gift Shop and Tea Garden	Arts and crafts	Swift Avenue
Loolekop Gallery	Arts and crafts	Phalaborwa Wildevey Avenue
The Pottery Studio	Arts and crafts	Birkenhead Street
Foskor Development Trust	Arts and crafts	Phalaborwa Gate Kruger National park
The Phalaborwa Foundation	Arts and crafts	Phalaborwa Tourism Center
Monsoon Gallery	Arts and crafts	29km from Hoedspruit
Other		
Hoedspruit Research and Breeding Centre	Wildlife Breeding Centre	at the Kapama Lodge on the R526
Moholoholo Rehabilitation Centre	Cultural Attractions	Hoedspruit
Nyani Tribal Village	Cultural Village	Hoedspruit
Swadini Reptile Park	Reptile Park	Hoedspruit
Foskor Mine Museum	Museum	Phalaborwa
Big Hole	Mine attraction	Phalaborwa

RESTAURANTS:

Name of Restaurant	Type of Restaurant	Location
Sefapane Restaurant	European and African Restaurant	at the Sefapane Lodge
La Werna	A la carte restaurant	near the Phalaborwa entrance to the Kruger National Park
The Guinea Fowl Restaurant and Pub	A la carte restaurant	Phalaborwa Impala Protea
Tiffany's	A la carte restaurant	Phalaborwa Rooibos Street
Buffalo Pub and Grill	Sports bar	Phalaborwa next to main road to Kruger National Park
Monroe's Family Restaurant	A la carte restaurant	Phalaborwa Rooibos Street
Yurok Spur	Steakhouse	Phalaborwa Mall
Godfathers	Pub	Phalaborwa Rooibos Street
Wimpy	Fast Food	Phalaborwa
Casa de Café	Coffe Shop	Phalaborwa
Panarottis	Fast Food	Phalaborwa
Steers	Fast Food	Phalaborwa
Bushveld Tavern	Restaurant and Pub	Phalaborwa
Naughties Restaurant	Restaurant and takeaways	Phalaborwa
Trading Post	Restaurant and Pub	Phalaborwa

Barberton Focus Area

ACCOMMODATION:

Name of Establishment	Accommodation Type	Location
Phoenix Hotel	Hotel	Pilgrim Street in the centre of town
Diggers Retreat	Guest House	Kaapmuiden Road
Old Coach House	Guest House	in a nature reserve 9km from Barberton on the R38
Weston Cottage	Guest House	Kaapmuiden Road
Sweet Home Guest Farm	Guest House	Badplaas Road
Barberton Guest House	Guest House	Badplaas Road
Fountain Baths Cottages	Self-Catering	Kaapmuiden Road
		against the Mkonjwa Mountain Range within walking distance to town
Diggers Rest	Self-Catering	Sheba Road
Gracefarm Cottages	Self-Catering	Badplaas Road
The Balcony	Self-Catering	Bowness Street
Mantongomane Lodge	Self-Catering/ Dinner, Bed and Breakfast	Rouxville Farm, 16kms out of town
Barberton Caravan Park	Caravan and Camping	President Street in town
Caravan Park	Caravan and Camping	General Street
Komati River Lodge	Self-Catering	Songimvelo Nature reserve
Kromdraai Camp	Self-Catering	Songimvelo Nature reserve
Olivia's Guest Villa	Bed and Breakfast	Norman Nader Street
Kloof House	Bed and Breakfast	Kloof Street
Hillside Lodge	Bed and Breakfast	Pilgrim Street
Jock's Place	Bed and Breakfast	Retief Street
Engonini B&B	Bed and Breakfast	Lows Creek (Kaapmuiden Road)
Jerusalemkop Game Lodge	Bed and Breakfast	Nelspruit Road
Jock of the Bushveld Huts	Bed and Breakfast	Nelspruit Road
Ostrich Bear Inn	Bed and Breakfast	Andrew Street
William George House	Bed and Breakfast	Bok House
Tom and Jokes	Bed and Breakfast	Bok Street
Barberton Manor	Bed and Breakfast	Sheba Road
The Top House	Bed only	President Street in town
Silver Willows	Bed only	Brand Street
Barberton High School Hostel	Bed only	Sheba Road
Barberton Primary School Hostel	Bed only	Hillary Street

RESTAURANTS:

Name of Establishment	Restaurant Type	Location
Victorian Tea Garden	Coffee Shop	Market Square (in town)
De Hollandse Hoek	Pizzas and Pancakes	Checkers Centre (in town)
The Goldmine	A la carte	Barberton Street in town
Co-Co Pan	A la carte	Crown Street in town
Ragamuffin Café	Coffee Shop	Pilgrim Street in town
The Bernstein's	Steakhouse	Pilgrim Street in town
Dalyns Coffee Shop	Coffee Shop	Pick n' Pay Centre (in town)
Pharaoah's Inn	A la carte	Crown Street (in town)
Dalyn's Coffee Shop	Coffee Shop	in town
Jock's Place	Coffee Shop	in town
Digger's Retreat	Country Hotel Restaurant	11kms outside barberton on the R38 outside Kaapmuiden
Old Coach Road	Pub	in town
Chico's Fried Chicken	Fast Food	in town

New Humpy Burger Box	Fast Food	in town
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ATTRACTIONS:

Name of Attraction	Type of Attraction	Location
Historical		
Barberton Museum	Museum	Crown Street in town
Old Stock Exchange Façade	Museum	In town
Belhaven House Museum	Museum	Lee Road
Guard House	Historical Building	In town
Old Fig Tree	Historical	In town
Jocks Memorial	Statue	in front of town hall
Regimental Badges	Historical	In town
Garden of Remembrance	Historical	In town
Lewis and Marks Building	Historical Building	Pilgrim Street
Fernlea House	Historical Building	Lee Road
Stopforth House	Historical Building	18 Bowness Street
Block House: Anglo Boer War	Historical Building	Corner of Lee and Judges Streets
Eureka City	Historical	R38 to Eureka City Mine
Coach and Wagon Shoot	Historical	Few kilometres outside Barberton
Aerial Ropeway	Cableway	between Barberton and Havelock Mine Swaziland
Globe Tavern	National Monument	Pilgrim Street
Lodge of St Johns	Neo-gothic masonic temple	Corner of Lee and Judge streets
Truter House	Historical Building	In town
Steam Locomotive	Historical	In town
Game/ Nature Reserves		
Songimvelo Game Reserve	Game/ Nature Based Tourism	west of Barberton situated in the Barberton mountainlands
Mountainlands Game Reserve	Game/ Nature Based Tourism	north east of Barberton
Nelshoogte Nature Reserve	Game/ Nature Based Tourism	along the R38 west of Barberton
Cythna Letty Nature Reserve	Game/ Nature Based Tourism	west of Barberton, north of the Brightonkop Pass
Tinie Louw Nature Reserve	Game/ Nature Based Tourism	along the Barberton- Bulembu road, north of Ida Doyer
Ida Doya Nature Reserve	Game/ Nature Based Tourism	along the Barberton- Bulembu road, north of Songimvelo
Paranie Nature Reserve	Game/ Nature Based Tourism	north east of Barberton, north of Mountainlands Game Reserve
Special Interest		
Geology	Rock formations and geology exploration	Barberton Mountainlands
Botany	Flora exploration	Barberton Mountainlands
Birding	Bird viewing	Songimvelo Game Reserve
Other		
De Brug Ostrich Farm	Ostrich viewing	12km along the Kaapsehoop road

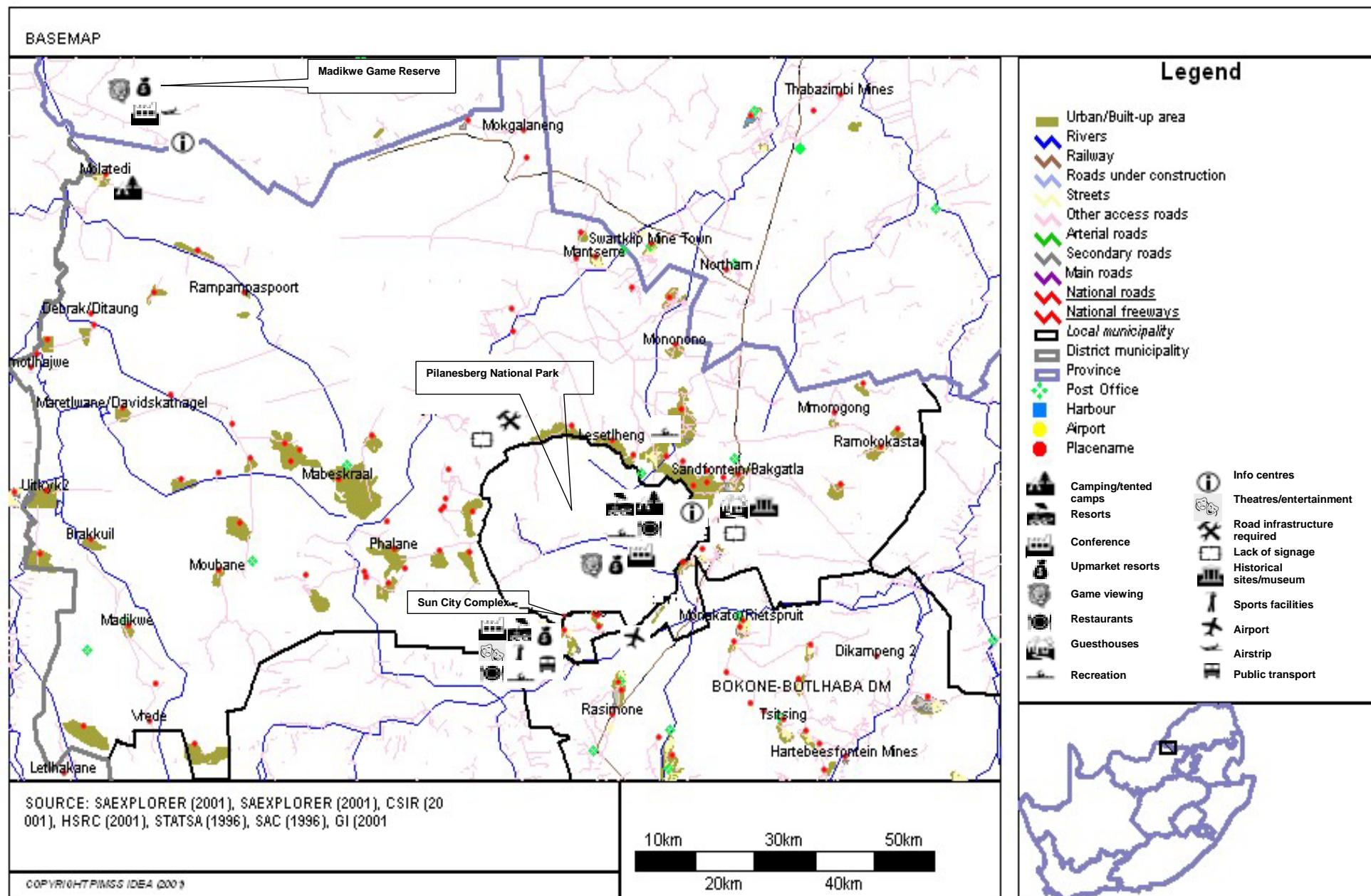
ACTIVITIES:

Name of Activity	Type of Activity	Location
Adventure		
Abseiling	Specialised Adventure	Barberton Surrounds
Horse Trails	Horse riding and scenery viewing	Barberton Surrounds
Fortuna Mine Tunnel Route	Historical tunnel walking/viewing	Mountainlands Game Reserve
Fortuna Hiking Trail	Hiking/walking	Mountainlands Game Reserve
Rose's Creek Walking Route	Hiking/walking	in town
Microlight Flights	Specialised Adventure	9kms on way to Barberton
Ebutsini 4x4 Route	4X4 Driving	situated between the Swaziland Border and Songimvelo Nature Reserve
Other 4x4 Routes	4X4 Driving	Mountainlands Game Reserve
Paragliding	Specialised Adventure	Barberton Surrounds
Historical		
Eureka City Ghost Town Tours	Guided historical mining town tour	R38 to Eureka City Mine
Barberton Heritage Walk	Heritage walking tour of town	Barberton
Pan Gold Tours	Guided Eureka City tour	R38 to Eureka City Mine
Scenic Drives/ Passes		
Barberton - Bulembu-Badplaas- Barberton	Scenery	Scenic route to Swaziland from Barberton
Nelshoogte Pass	Scenery	R38 between Barberton & Badplaas
Eureka City Pass	Scenery	R38 towards Kaapmuiden
Saddleback Pass	Scenery	Close to Barberton & Tinnie Louw Nature Reserve
Brightonkop Pass	Scenery	Close to Barberton & Tinnie Louw Nature Reserve

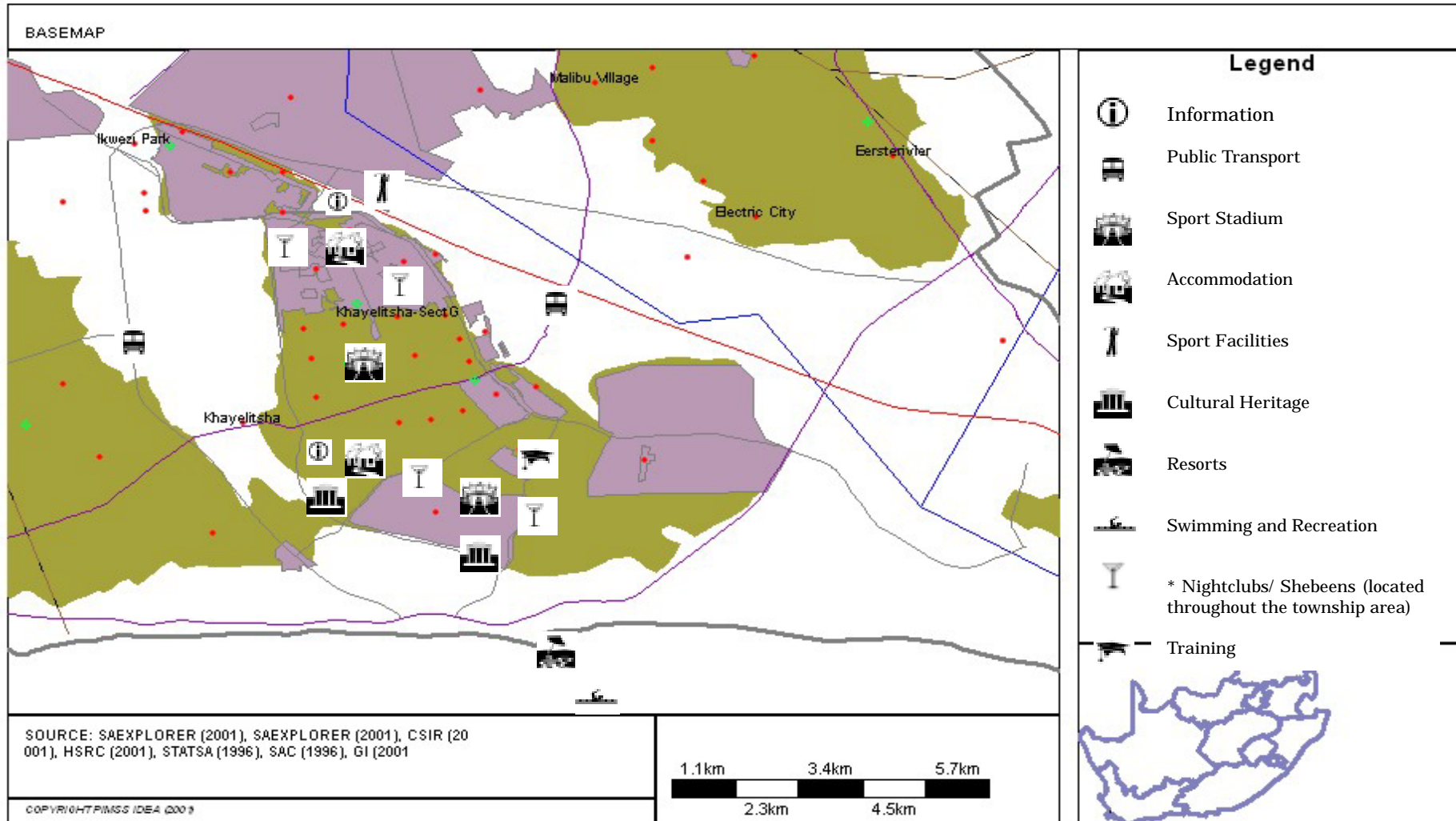
Appendix D

Tourism Resource Maps for Focus Areas

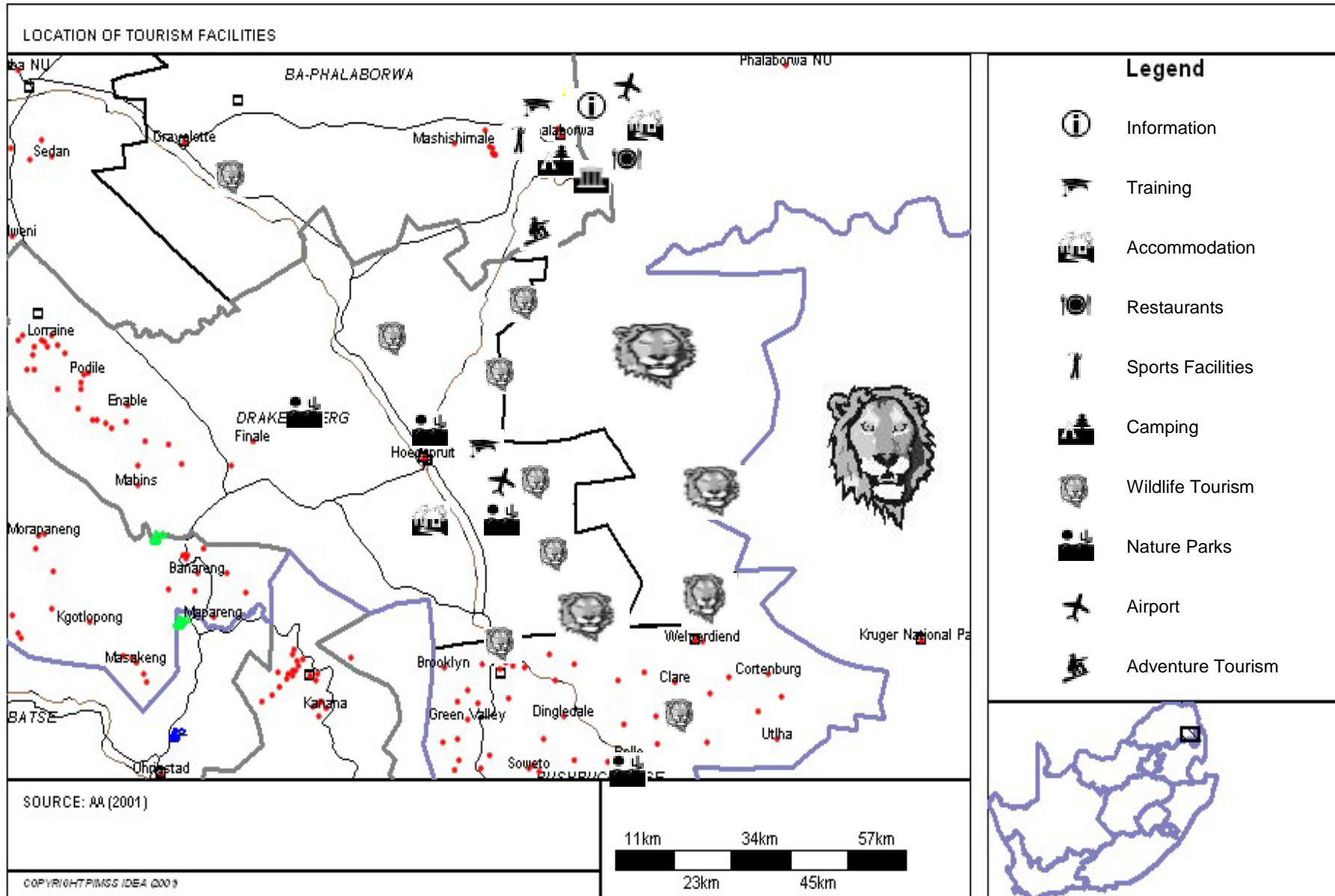
Tourism Resource Map – Pilanesberg-Madikwe Corridor Subject Area



TOURISM RESOURCE MAP – KHAYELITSHA SUBJECT AREA



Tourism Resource Map – Valley of the Olifants Subject Area



Tourism Resource Map – Barberton Subject Area

