

Karoo Tourism Strategy

Karoo Toerisme-Strategie



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THE KAROO TOURISM STRATEGY

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DIE KAROO TOERISME-STRATEGIE

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THE KAROO TOURISM STRATEGY

Foreword: Karoo Tourism Strategy Development

This Strategy was based on several research papers written under the auspices of the Arid Areas Research Programme.¹ Various surveys were conducted in the Karoo during 2010, and the findings from these and from a scan of Karoo websites were combined into an extensive data-base of Karoo attractions. These are diverse and of an extraordinarily high standard.

The Strategy also needs to deal with major developmental needs in the Karoo, however, including unemployment and poverty. Until now, coherent regional development in the Karoo has been undermined by an excessive government focus on provincial, district and local municipal boundaries. This means that synergies across boundaries are very difficult to identify and promote. This Strategy is therefore an attempt to show how the assets of a remote region can be maximized if there is a deliberate focus on promoting common features and establishing a common tourist brand. For this reason, we deliberately promote collaboration between the four Karoo provinces – the Northern Cape, Western Cape, Eastern Cape and Free State.

Once the first draft of the Strategy was compiled, it was workshopped with stakeholders in several Karoo towns. A total of 600 Karoo people, including municipal officials, tourism service providers, planners and community organizations, were consulted.

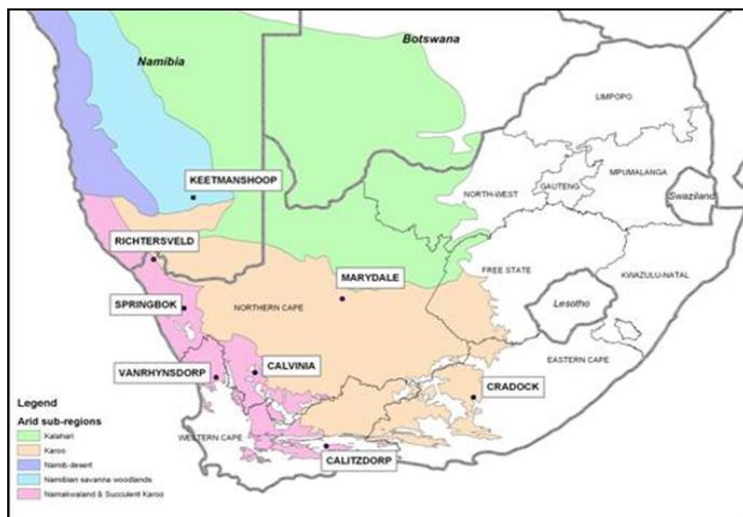
The Strategy has been compiled under the auspices of the Karoo Development Foundation (KDF), in partnership with the University of the Free State.

¹ www.aridareas.co.za

1. The Purpose of the Karoo Tourism Strategy

The full Karoo Tourism Strategy provides:

1. Research information
2. Drafting of key strategic directions for an inter-provincially shared strategy, with several niche markets
3. A motivation for a central Karoo airport at Beaufort West, with a tarred runway, scheduled flights, car rentals, and links with smaller Karoo airports on a “hub and spoke” basis
4. A concept proposal for a Karoo Tourism Agency.



*Succulent Karoo (Namaqualand and Little Karoo)
and Nama Karoo in the interior*

2. Desert Tourism

More ageing people and young people are travelling, and more people want to combine travelling with volunteer work. Others are looking for unusual, niche experiences. Increasingly, people want to connect emotionally with destinations. Desert tourism is becoming a major international phenomenon. Solitary experiences are being sought, based on images of serenity and purity, beautiful sunsets and clear night skies. The Karoo offers all these things and should be marketed as South Africa's own desert destination.

3. The Karoo: South Africa's Premier Desert Destination

The Karoo comprises 40% of South Africa's land surface. It consists of three parts: the Great Karoo, the Little Karoo, and Namaqualand. It straddles four provinces and even stretches into the southern part of Namibia.

There are five 'core' District Municipalities in the Karoo: Cacadu DM (Graaff-Reinet, Eastern Cape), Central Karoo DM (Beaufort West, Laingsburg, Prince Albert), Pixley ka Seme DM (De Aar, Colesberg, Carnarvon, Victoria West, Hopetown, Prieska,) Namaqua DM (Springbok, Calvinia, Garies, Sutherland, Port Nolloth), and Xhariep DM (Southern Free State, Trompsburg, Gariëp Dam and Koffiefontein). In addition, the Karoo includes several other Local Municipalities.

The Karoo is divided into several historical sub-regions (the Camdeboo, the Koup, the Bo-Karoo, the Noorsveld, the Tankwa-Karoo, Namaqualand and the Little Karoo). The Karoo consists of 66 towns which offer a wide range of architectures and history. Some of them are situated on highways and serve the travellers

on the main routes. Others are located in more remote areas and are reliant on livestock agriculture and/or tourism.

The Karoo is home to more than a million people, of whom more than a third live in the Cacadu DM. Close to 70% of them live in towns; approximately one third are unemployed, and 30-60% of households live in poverty. The Karoo Tourism Strategy is likely to be of benefit – directly or indirectly – to most of them.

The arid areas of South Africa are sparsely populated (population density: 1 or 2 persons per km²). The spatial structure consists of small and medium-sized towns, surrounded by a hinterland of large commercial farms. Although these towns are fairly well provided with infrastructure, there are worrying aspects to their socio-economic profile (poverty, the influx of migrants from farms and the Eastern Cape, an out-migration of skilled people, high HIV/AIDS levels). The arid areas have certain assets, however: the game industry is growing, bringing valuable foreign exchange to the region; agricultural expertise is high; social services are generally good; some of the towns are developing significant tourism potential; and there is a growing phenomenon of 'reverse migration' – middle class city-dwellers moving to the Karoo.

The Karoo is already building its tourism product around seven major highways which connect the cities of Cape Town, Port Elizabeth and Bloemfontein. Significantly, the Central Karoo DM has been chosen as one of the Government's rural nodes, which could be an aid to regional development.

4. Government Tourism Strategies

A Karoo regional strategy is relevant to several Government policies – notably the Presidential outcomes, as well as sectoral strategies.

4.1 The Presidential Outcomes

Outcomes 4-10 of the key 12 Presidential goals include:

- Decent employment through inclusive economic growth;
- The creation of a skilled workforce to support an inclusive growth path
- An efficient and competitive infrastructure network
- Vibrant rural communities
- Sustainable human settlements
- An efficient, effective, accountable and responsive local government system; and
- Protection of the natural environment.

The development of Karoo tourism can meet all these goals.

4.2 The New Growth Path

The Growth Path proposes strategies to deepen the domestic and regional market, to widen the market for South African goods and services, and to launch major new tourism regions, creating employment and stimulating growth. Tourism has been identified as one of the six major focus areas of the New Growth Plan. Several of the key initiatives identified in the Plan can be promoted by means of Karoo Tourism.

4.3 National Planning Commission

The National Development Plan identifies tourism as an important sector of the economy. It contributes 9% to national GDP. The Plan highlights several key strategies, which are all of significance to the promotion of tourism in the Karoo.

4.4 Industrial Policy Action Plan (IPAP2)

The IPAP2 indicates that tourism is one of the sectors expected to contribute to the development of rural areas. It also highlights the potential of increased local development due to domestic tourism, and the importance of the development of niche tourism.

4.5 National Tourism Sector Strategy

The NTSS proposes increasing the geographical spread of tourism; increasing rural tourism; showcasing South Africa as a distinct and globally recognised tourist destination; promoting tourism in upper and middle class groups in South African society; promoting BBEE in tourism, especially in townships; decreasing seasonality; developing new markets; and identifying at least one event in each province as a flagship event. Internally, our tourism industry remains fragmented. Co-ordination from national level is needed to ensure alignment between national policy and product development.

4.6 Rural Tourism Strategy

The Strategy is based on the concept of development nodes, which is the cornerstone of Government's rural development strategy in general. The selection of the Central Karoo District as a rural node is a useful beginning, but strong links need to be built between the Beaufort West area and the Karoo regions in the other provinces.

4.7 SA Tourism

SA Tourism is the national institution responsible for the growth and development of tourism. Its six key objectives (SAT 2010b: 18) have important implications for the Karoo:

SA Tourism's six key objectives (SAT 2010b: 18) also have implications for the Karoo:

- Understand the market: Which tourists are likely to enjoy the Karoo?
- Choose the attractive niche markets: Prioritise the most important tourism segments in the Karoo
- Market the destination: Design marketing materials for the Karoo as a whole
- Facilitate the removal of obstacles: Identify hindrances to Karoo tourism (e. Poor roads, inadequate service delivery standards)
- Facilitate an institutional platform: Create a shared tourism institution for the Karoo which can identify strengths and weaknesses, and develop tourism product
- Monitor and learn from tourism experiences: Collect data about Karoo tourism on an ongoing basis.

5. Karoo Provincial Strategies

5.1 Western Cape

While the Western Cape has initiatives to attract visitors to destinations beyond Cape Town, Stellenbosch, Paarl and Franschhoek, a need remains for a distinctive targeting of the Karoo in the Western Cape. Route 2 (Cape Town to the Cape Winelands) and the Central Karoo is a start.

5.2 Eastern Cape

The Eastern Cape Tourism Master Plan (2009-2014) places strong emphasis on the close links between ecology and tourism. The Master Plan makes provision for the Great Karoo Gateway Biosphere, located in the Chris Hani District. The Ukhahlamba DM made provision for the amalgamation and expansion of parks around the Gariiep Dam.

5.3 Northern Cape

Five out of the seven biomes in South Africa are located in the Northern Cape. The region is also rich in cultural history. The Northern Cape's Growth and Development Strategy is to build a strong provincial brand, 'Northern Cape Real', which aims to capture a sense of ecological hyper-reality.

5.4 Free State

The Free State's main tourism product is its natural scenery, followed by a range of historical and cultural features. An advantage it enjoys is its central location in South Africa. It is a popular tourist stopover destination. The southern Free State is characterised by historical small towns and game farms.

5.5 Conclusion

Each provincial strategy has key features, approaches and strategies. There is a great deal that they can learn from each other. However, the division into artificial provinces prevents synergies. A region-wide focus is needed.

6· Karoo Tourism Product Supply

6·1 Accommodation Establishments

There is no coherent database of Karoo tourism service providers, but there appear to be a huge number of accommodation establishments in the Karoo. Thousands of beds are available in guest houses and on guest farms.

6·2 Tourism Activities and Attractions

The Karoo can develop tourist attractions on a large number of themes:

- Palaeontology
- Karoo cuisine
- Rock art, and San and Khwe sites
- Geo-tourism, due to our unusual rock formations
- Karoo crafts
- Architecture (corbelled houses, *brakdak*, Victorian)
- Anglo-Boer War
- Literary heritage
- Nature (tortoises, riverine rabbit, succulent plants, game)
- Agricultural heritage (merino, angora)
- Astronomy
- Political struggle history
- Missionary and church history
- Graveyard tourism
- Adventure tourism
- The People of the Karoo (*karretjiemense*)

A survey of attractions in all Karoo towns was done by the University of the Free State. Approximately 1,000 attractions were identified.

Karoo towns each have their own distinctive character and assets (see the full Tourism Strategy document for a table, listing these towns and assets). A much more detailed comparison needs to be undertaken, to enable the linking of towns in collaborative marketing systems.

6.3 Tourism Growth Prospects

In 2010 a survey of guest house owners was conducted in 12 Karoo towns. The vast majority (93%) were sure tourism would grow. The reasons they gave were: the uniqueness, heritage and authenticity of the area, its climate and natural beauty, its unspoilt remoteness and quiet, its safety, eco-tourism, Karoo hospitality, niche markets, cheapness and affordability, reverse migration, growth of rural tourism, important large-scale projects, e.g. SALT and SKA, and a high level of investment in certain sectors.

6.4 How Can Tourism In The Karoo Be Improved?

In a survey, 260 Karoo tourists were asked what infrastructure needed to be improved in the region. Remarkably, 21% of the respondents gave the unprompted reply that the Karoo should be 'kept the way it is'. However, other people suggested better roads, signage, picnic spots, resorts, ATMs, medical services, restaurants and public transport. The Karoo is known as a safe region to visit.

6.5 How Developed Is Karoo Tourism?

South Africa in general, and the Karoo in particular, represents an 'early stage' of tourism development. Characteristics of tourism at this stage are:

1. The market is uninformed and price-insensitive. Curiosity and a desire to explore prompt visitors to come to the region.
2. The product is very individualized, small-scale and diverse.
3. Competitors are few.
4. The marketing organization is unsophisticated, isolated and has few specialized information-providers.

However, in some ways the Karoo is moving to the middle stage of tourism development, with more competition, the rapid entry of new players, and the emergence of consolidating forces (e.g. shared marketing and routes). The tourism region needs to be consolidated around a few core themes, and the development of new tourism value chains around these themes. This will involve entrepreneurs providing services to tourist enterprises, and tourist enterprises providing services to other businesses. This will boost local economic multipliers and jobs.

7. Tourism Demand

There are several key features of South African tourism, which need to be incorporated into a Karoo Tourism Strategy.

7.1 Domestic tourism

In 2007-8, domestic tourism declined. There were about 20% more tourists, but the number of trips declined by 8.4%. However, the average spent per trip increased from R550 to R780. This

tendency may benefit the Karoo market, which is further from the main cities and thus suitable for fewer but longer stays. A low-budget destination like the Karoo also has an advantage.

Travel by domestic tourists has been relatively stagnant, compared to arrivals by air (which increased by about 10% between 2005 and 2007).

Visiting Friends and Relatives is still the main reason for domestic trips (25-30%), but travelling on holiday grew from 3% in 2003 to 16% in 2008, and appears to be the future. The length of holiday stays is still very short (only 5 days), so people could perhaps be encouraged to stay longer at low-cost destinations.

VFR remains the main form of accommodation (around 80%), while self-catering accommodation (4% of nights), hotels (4%), guest houses (3%), B&Bs (3%) and game parks and backpackers (0,5%) shared the *paid* accommodation.

For Government, improved geographic spread of tourism is a key goal, as well as reducing the geographic polarization of holiday travel. This means that relatively unexplored regions, such as the Karoo, should be promoted.

The main activities of domestic tourists are social attractions, shopping, beach, nightlife and casinos. These are not very relevant to the Karoo, but the next priorities certainly are: visiting natural attractions, wildlife and cultural sites.

Domestic travel is very seasonal, based largely on the school holidays. The regular migration of Gauteng tourists through the Karoo, to destinations at the sea, remains an important source of income. The Karoo market is smaller, older, more selective, more affluent, and spends more time on trips.

7.2 Foreign tourism

The number of foreign arrivals in South Africa has shown steady growth, from 2,5 million in 1993 to 9,9 million in 2009. The UK, USA and Germany remain the top long-haul markets, followed by the Netherlands, France and Australia. While the domestic market accounts for 75% of tourism *volume*, foreign tourism contributes 79% of tourism *revenue*, with air arrivals contributing 52% of tourism revenue.

Research has shown that foreign tourists are exposed to fewer and less authentic experiences than they desire. This is a major opportunity for the Karoo.

7.3 Profile of the Karoo Tourist

A survey of 183 tourists undertaken in 12 towns in the Karoo in May-August 2010 revealed that 53% were in the age bracket 36-55, and an additional 19% were 56 years or older. 17% were in the age group 26-35. They were well educated people. More than half (60%) were in the middle income group; 12% were more affluent, and 12% in the lower income group.

Those visiting the Karoo are usually over 30, people who like visiting new and authentic places. But the diversity of tourist attractions has the potential to draw a wider array of travellers – if a unified approach to tourism marketing is employed.

8. Tourism Strategies and Outcomes

8.1 Regional Tourism Institutional Alignment

The Regional Strategy is based on the premise that collaboration among the four Karoo provinces can be secured. This will be required at two levels: 1) Strategic tourism planning in the provincial Departments of Tourism, and 2) Tourism marketing, involving the provincial Tourism Agencies. Thereafter, collaboration must be secured among Karoo District Municipalities, local Municipalities, and their respective tourism committees. Incremental, piecemeal collaboration between Karoo towns can then be developed, on common themes.

A suitable institutional vehicle will need to be created, a shared Karoo Tourism Agency, backed national government departments and development institutions.

Given the status of Beaufort West as the key town in the Karoo's rural node, it may be ideal to situate the Headquarters of the Karoo Tourism Agency there, with satellite offices in other towns. Such a proposed Karoo Tourism Agency will be the main driver of this Karoo Tourism Strategy. The leaders of the Agency should be very experienced in tourism product development and marketing, should be supported by a strong Board representing the Provinces and District Municipalities, and should receive adequate funding from national and provincial authorities, as well as private subscriptions and corporate grants.

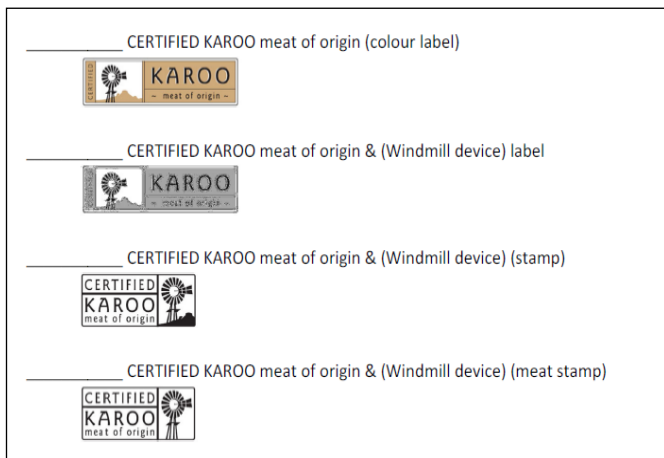
8.2 Regional Branding

The Karoo Tourism Agency will register its own brand, based on the brand architecture of South African Tourism. This can also include a Karoo Tourism Certification Mark, guaranteeing

authenticity. A certification mark has already been registered by the Karoo Development Foundation for the Karoo Lamb and Karoo Crafts projects. Now a study of existing Karoo brands should be undertaken, to promote synergies among them. An overarching Karoo brand should not detract from regional route or niche tourism brands.

The following certification and trademarks have been registered by the KDF, on behalf of the people of the Karoo:

Karoo Lamb:



Karoo

Crafts:



8.3 Regional Tourism Product Development

A key discussion will have to take place around the identification of tourism product on a regional scale. Tourism service providers can be engaged to conduct feasibility studies to identify region-wide attractions and products. Subsequently, donor and government funding will have to be secured for product development and training.

Workshops and Meetings will have to define tourism routes and linkages between and among accommodation establishments and suppliers. The process should also identify existing state and private assets, such as municipal camping grounds and resorts, which may need renovation and improved marketing.

A data-base of over 1 000 Karoo tourism attractions already exists, but important new tourism sectors need to be identified, researched and promoted. Examples are Olive Schreiner, NP van Wyk Louw, Struggle (the Colesberg Museum), Anglo-Boer War tourism (blockhouses and commando routes), Hunting, Mountain-biking, Rock art, and Karoo cuisine.

8.4 Shared Regional Marketing

A shared marketing strategy by the four provinces is needed. It should encourage both “horizontal” collaboration between provinces, municipalities and regional bodies, as well as “vertical” co-operation between national, provincial and municipal levels of government - in matters such as marketing and research.

8.5 Tourism Skills Development

Local residents need to be trained in the hospitality industry, tour-guiding, cuisine and supplementary activities such as transport, construction and building renovation. The Tourism and Hospitality Sectoral Education and Training Agency (SETA) must be a partner of the Karoo Tourism Agency, to co-ordinate and fund training programmes.

8.6 Promoting SMEs

Small and Medium-sized Enterprises are critical to the economy, as they are the main creator of jobs. In the Karoo Tourism Strategy, thousands of SMEs need to be identified per product and sector, so that shared marketing and support systems can be provided to assist them to reach their full potential.

8.7 Promoting Micro-Enterprises

Micro-enterprises can often identify very specific niche markets, based on the work of the entrepreneur with just a few workers or helpers. It will be important in the Karoo Tourism Strategy to identify the most effective points of entry of poor people into the business system. These might well be in the craft and catering sectors. As the tourism sector expands, there will also be a growing demand for artisans (builders, painters, plumbers and electricians) to service the guest houses and restaurants.

8.8 Promoting Appropriate Infrastructure

Karoo tourism requires several infrastructure interventions:

- Signage
- Road maintenance

- Urban street maintenance
- Central Business District refurbishment in Karoo towns
- Well-managed attractions
- Municipal services, and
- Safe parking facilities.

Municipalities need to include such issues in their Integrated Development Plans, to secure funding from their provinces.

8-9 Centrally Located Airport

The Karoo requires an effective system of air, road and rail transport. A major issue is the creation of an airport, with an all-weather runway, night lights and scheduled flights. The advantage of scheduled flights is that it makes car rental possible, which can make the Karoo a destination, instead of a hinterland of conventional tourism cities such as Cape Town and Port Elizabeth. Such an airport Beaufort West could be linked with other Karoo airports through a “hub and spoke” system.

8-10 Special Tourism Initiatives

The original document lists 16 possible special programmes which could be set in motion to promote tourism in the Karoo. These include an annual Karoo Week, a calendar of Karoo Events and festivals, videos, data-bases of attractions, and developing the Orange River and its dams as ‘the Karoo Riviera’.

8-11 Karoo Tourism Research

Ongoing research will be required on:

- Business intelligence regarding Karoo tourism

- Tourism trends
- Environmental impact of tourism, mining and transport in the Karoo
- Tourism economic multipliers in the Karoo
- Tourism training systems;
- The 'business ecology' of Karoo towns, and
- Changing tourism perceptions about the Karoo.

9. *Next steps*

- Step 1: Create informal networks across provincial and district boundaries
- Step 2: Conduct a full product audit and gap analysis
- Step 3: Facilitation by the national Department of Tourism of an interprovincial discussion on a Karoo Tourism Strategy
- Step 4: Signing of an interprovincial MOU
- Step 5: More formal co-ordination of tourism-related institutions in the Karoo
- Step 6: Promoting the development of a Karoo Airport in Beaufort West.

DIE KAROO TOERISME-STRATEGIE

Voorwoord: Ontwikkeling van die Karoo Toerisme-strategie

Hierdie Strategie is op verskeie navorsingstukke gebaseer wat onder die vaandel van die *Arid Areas Research Programme*² geskryf is. Verskeie opnames is gedurende 2010 in die Karoo gemaak, asook 'n oorsig van Karoo-webwerwe, en hierdie bevindinge is tot 'n uitgebreide databasis van Karoo-aantreklikhede gekombineer. Hierdie aantreklikhede is uiteenlopend en van 'n buitengewone hoë standaard.

Die Strategie moet egter ook rekening hou met belangrike ontwikkelingsbehoefte in die Karoo, insluitend werkloosheid en armoede. Streeksontwikkeling word bemoedlik deur 'n oordrewe regeringsfokus op provinsiale, distriks- en plaaslike munisipale grense. Dit beteken dat samewerking oor grense heen baie moeilik is om te bewerkstellig. Hierdie Strategie is gevolglik 'n poging om aan te toon hoe die bates van 'n afgeleë streek uitgebrei kan word, indien daar 'n doelbewuste fokus is op die bevordering van gemeenskaplike bates en die vestiging van 'n gedeelde toeristehandelsmerk in die Karoo. Om hierdie rede poog ons om gesamentlike inisiatiewe te loods, tussen die Oos-Kaapse, Wes-Kaapse, Noord-Kaapse en Vrystaatse dele van die Karoo.

Nadat die eerste konsepdokument van die Strategie opgestel is, is dit met belanghebbendes in verskeie Karoodorpe bespreek. Meer as 600 Karoomense, insluitend munisipale amptenare, besighede, beplanners en gemeenskapsorganisasies, is geraadpleeg.

²

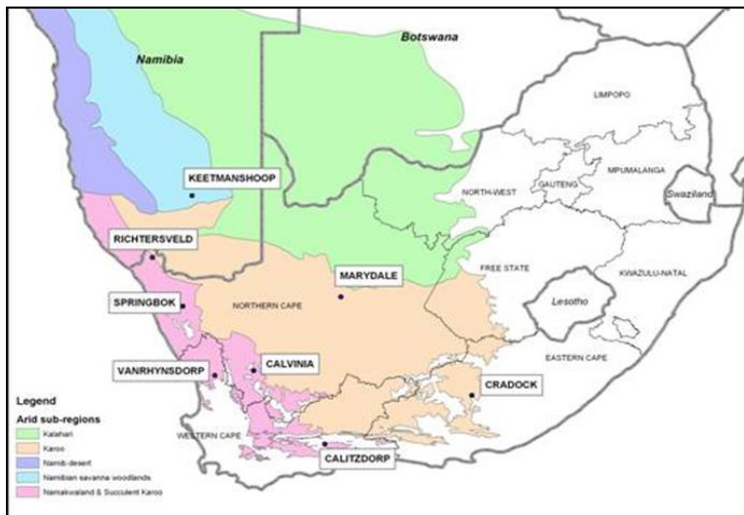
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Die Strategie is saamgestel onder die vaandel van die Karoo Ontwikkelingstigting (KDF), in vennootskap met die Universiteit van die Vrystaat.

1. Die Doelstellings van die Karoo Toerisme-strategie

Die Karoo Toerisme-strategie verskaf die volgende:

1. Navorsingsinligting
2. 'n Raamwerk vir 'n interprovinsiale strategie, met verskeie nis-markte
3. 'n Motivering vir 'n sentrale Karoo-lughawe te Beaufort-Wes, met geskeduleerde vlugte, huurmotors, en skakels met kleiner Karoo lughawens
4. Opstel van 'n befondsingsvoorstel vir 'n Karoo Toerisme-Agentskap.



Die Sukkulente-Karoo (Namakwaland en Klein-Karoo) en Nama Karoo in die binneland

2. *Woestyntoerisme*

'n Toenemende aantal ouer mense en jonger mense reis deesdae. Al meer mense wil reis met vrywillige sosiale werk kombineer. Ander toeriste soek ongewone nis-ervarings. Mense wil toenemend emosioneel by reisbestemmings betrokke raak. Woestyntoerisme word 'n beduidende internasionale verskynsel. Die ervaring van afsondering, gegrond op beelde van onverstoordheid en suiwerheid, van pragtige sonsondergange en helder sterrenagte, word al meer gesog. Die Karoo kan dit alles aanbied, en hierdie streek behoort as Suid-Afrika se eie woestynbestemming bemark te word.

3. *Die Karoo: Suid-Afrika se Vernaamste Woestynbestemming*

Die Karoo beslaan 40% van Suid-Afrika se grondgebied. Dit bestaan uit drie dele: die Groot Karoo, die Klein Karoo en Namakwaland. Dit strek oor vier provinsies heen, tot in die suidelike dele van Namibië.

Daar is vyf 'kern' Distriksmunisipaliteite in die Karoo: Cacadu DM (Graaff-Reinet, Oos-Kaap), Sentraal-Karoo DM (Beaufort-Wes, Laingsburg, Prins Albert), Pixley ka Seme DM (De Aar, Colesberg, Carnarvon, Victoria-Wes, Hoopstad, Prieska,) Namakwa DM (Springbok, Calvinia, Garies, Sutherland, Port Nolloth), en Xhariep DM (Suid-Vrystaat, Gariëp Dam en Koffiefontein). Die Karoo sluit ook verskeie Plaaslike Munisipaliteite in.

Die Karoo kan in verskeie historiese substreke verdeel word (die Kamdeboo, die Koup, die Bo-Karoo, die Noorsveld, die Tankwa-Karoo, Namakwaland en die Klein Karoo). Die Karoo sluit 66

dorpe in wat 'n wye verskeidenheid argitektuur en geskiedenis aanbied. Sommige dorpe lê bedien reisigers op die hoofroetes. Ander is in meer afgeleë gebiede en is van veetelt en/of toerisme afhanklik.

Daar woon meer as 'n miljoen mense in die Karoo; meer as een derde van hulle in die Cacadu DM. Byna 70% van hulle is dorpsbewoners; ongeveer een derde is werkloos, en 30-60% van huishoudings is armoedig. Die Karoo Toerisme-strategie sal die meeste van hulle – direk of indirek – bevoordeel.

Die semi-woestynggebiede van Suid Afrika is dun bevolk (bevolkingsdigtheid: 1 or 2 persone per km²). Die ruimtelike struktuur bestaan uit klein nedersettings en groter dorpe, omring deur 'n landskap van groot kommersiële plase. Alhoewel hierdie dorpe 'n redelik goeie infrastruktuur besit, is sekere aspekte van hul sosio-ekonomiese profiel kommerwekkend (armoede, die intog van immigrante van die plase en vanuit die Oos-Kaap, 'n uitmigrasie van geskooldes, en hoë vlakke van HIV/VIGS).

Maar die Karoo het egter ook positiewe faktore: die jagindustrie groei sterk en bring waardevolle buitelandse valuta na die gebied; landbouvaardighede is van 'n hoë gehalte; maatskaplike dienste is oor die algemeen goed; sommige dorpe ontwikkel beduidende toerisme-potensiaal; en daar bestaan toenemend die verskynsel van 'anti-verstedeliking' – d.w.s. middelklas stadsbewoners wat na die Karoo toe trek.

Die Karoo bou reeds sy toerismeproduk om die sewe hoofpaaie wat die stede Kaapstad, Port Elizabeth en Bloemfontein met mekaar verbind. Dit is betekenisvol dat die Sentrale Karoo Distrik as een van die Regering se landelike ontwikkelingspunte gekies is – iets wat die hele Karoo streek kan bevoordeel.

4. Toerisme-strategieë van die Regering

'n Karoo Toerisme-strategie is relevant verskeie Regeringsbeleidstukke – vernaamlik die Presidensiële Doelwitte, sowel as verskeie sektorale strategieë.

4.1 Die Presidensiële Uitkomst

Doelwitte 4-10 van die 12 sleutel Presidensiële uitkomst behels die volgende:

- Werkskepping deur inklusiewe ekonomiese groei;
- Die skepping van geskoolde en doeltreffende arbeid as deel van inklusiewe ekonomiese groei;
- 'n Doeltreffende en mededingende infrastruktuurnetwerk;
- Dinamiese landelike gemeenskappe;
- Volhoubare nedersettings;
- 'n Doeltreffende en verantwoordelike plaaslike regerings;
en
- Beskerming van die natuurlike omgewing.

Die ontwikkeling van Karoo-toerisme kan al hierdie doelwitte vervul.

4.2 Die 'New Growth Path'

Die 'Growth Path' stel strategieë voor om die plaaslike en streekmarkte te ontwikkel, die mark vir Suid-Afrikaanse goedere en dienste te verbreed, en om nuwe toerismestreke te vestig, om sodoende werkseleenthede te skep en groei te stimuleer.

Toerisme is een van die ses fokusgebiede van die 'New Growth Plan'. Verskeie sleutelinisiatiewe wat in die Plan geïdentifiseer word, kan deur middel van Karoo Toerisme bevorder word.

4.3 Nasionale Beplanningskommissie

Die Nasionale Ontwikkelingsplan identifiseer toerisme as 'n belangrike sektor van die ekonomie. Dit behels 9% van nasionale ekonomiese groei. Die Plan beklemtoon verskeie sleutelstrategieë wat almal vir die bevordering van toerisme in die Karoo betekenisvol is.

4.4 'Industrial Policy Action Plan (IPAP2)'

Die Aksieplan identifiseer toerisme as een van die sektore is wat tot die ontwikkeling van landelike gebiede sal bydra. Dit beklemtoon ook die potensiaal wat bestaan om plaaslike ontwikkeling te verhoog as gevolg van interne toerisme, en die behoefte aan die ontwikkeling van nis-toerisme.

4.5 Nasionale Toerisme Sektorstrategie

Die NTSS wil die geografiese uitbreiding van toerisme, asook groei in landelike toerisme, bevorder. Dit wil Suid-Afrika as 'n afsonderlike en wêreldwye toeristebestemming bemark. Ander doelwitte sluit in:

- Om toerisme in hoër- en middelklasgroepe van die Suid-Afrikaanse samelewing te bevorder;
- Om swart bemagtiging in toerisme, veral in die townships 'n hupstoot te gee;
- Om seisoenaliteit te verminder;

- Om nuwe markte te ontwikkel;
- En om minstens een gebeurtenis in elke provinsie as vlagskipgebeurtenis identifiseer.

Maar ons toerisme-industrie bly gefragmenteer. Koördinasie vanuit nasionale vlak word benodig om nasionale beleid en produkontwikkeling in pas met mekaar te bring.

4.6 Strategie op Landelike Toerisme

Die Strategie is op die konsep van ontwikkelingspunte gebaseer, wat die hoeksteen van die Regering se algemene landelike ontwikkelingstrategie vorm. Die keuse van die Sentraal-Karoo Distrik as 'n landelike groeipunt is 'n goeie begin, maar sterk verbintnisse tussen die Beaufort-Wes-gebied en die Karoogebiede in die ander provinsies sal gesmee moet word.

4.7 SA Toerisme

SA Toerisme is die nasionale liggaam wat vir die groei en ontwikkeling van toerisme verantwoordelik is. Sy ses sleuteldoelwitte (SAT 2010b: 18) het belangrike implikasies vir die Karoo:

- Verdiep ons begrip van die mark: Wat sal toeriste geniet in die Karoo?
- Kies die aantreklike nis-markte, en prioritiseer hulle ontwikkeling
- Bemark die streek as 'n geheel
- Verwyder problematiese aspekte in die Karoo, bv swak paaie, onvoldoende diensleweringstandaarde

- Skep 'n gesamentlike instelling vir die Karoo wat sterk en swak punte kan identifiseer, en die toerismeprodukte identifiseer en promoveer
- Leer van toeriste en produkeienaars se ervarings: Versamel data oor Karoo Toerisme.

5. Provinsiale Karoostrategieë

5.1 Wes-Kaap

Terwyl die Wes-Kaap reeds pogings aanwend om besoekers na bestemmings buite Kaapstad, Stellenbosch, Paarl en Franschhoek te lok, is daar steeds 'n behoefte aan bemarking van die Karoo as sulks in die Wes-Kaap. Roete 2 (Kaapstad na die Wynland) en die Sentraal-Karoo is 'n goeie begin.

5.2 Oos-Kaap

Die meesterplan van Oos-Kaap Toerisme (2009-2014) beklemtoon sterk die noue ver-bintenis tussen ekologie en toerisme. Die Meesterplan maak voorsiening vir die Groot Karoo 'Gateway' Biosfeer, in die Chris Hani Distrik. Die Ukhahlamba DM het ook die amalgamasie en uitbreiding van die parke rondom die Gariëpdam moontlik gemaak.

5.3 Noord-Kaap

Vyf van die sewe biosfere in Suid-Afrika word in die Noordkaap aangetref. Die streek is ook ryk aan kultuurgeskiedenis. Die Noord-Kaap se Groei en Ontwikkelings-strategie se doelwit is om 'n sterk provinsiale handelsmerk, 'Northern Cape Real', te vestig, om 'n gevoel van ekologiese hiperrealiteit aan te wakker.

5.4 Vrystaat

Die Vrystaat se hoof toerismeproduk is sy natuurlike skoonheid, gevolg deur verskeie historiese en kulturele bates. Sy sentrale ligging in Suid-Afrika is ook 'n groot bate en toeriste vertoef graag oornag in die provinsie. Die Suid-Vrystaat is gekenmerk deur historiese dorpies en gasteplase.

5.5 Slot

Elke provinsiale strategie het sleutelkenmerke en benaderings. Die provinsies kan veel by mekaar leer. Die kunsmatige grense van die provinsies bemoeilik egter die ontwikkeling van sinergieë. 'n Streekbenadering word benodig.

6. Aanbod van Karoo Toerismeproduk

6.1 Akkommodasie-inrigtings

Daar is geen volledige databasis van die verskaffers van Karoo toerismediensie nie, maar daar blyk 'n reuse aantal akkommodasie-inrigtings in die Karoo te wees. Duisende beddens in gastehuse en op gasteplase is beskikbaar in die Karoo.

6.2 Toerisme-aktiwiteite en -Aantreklikhede

Daar is 'n groot verskeidenheid temas waarom die Karoo toeriste-aantreklikhede kan ontwikkel:

- Paleontologie
- Karoo cuisine
- Karoo kuns

- Rotskuns, veral met San en Khwe erfenis
- Geo-toerisme, as gevolg van ons interessante rotsformasies
- Argiketuur (korbeelhuse, brakdakke, Viktoriaanse geboue, ou spoorwegstasies)
- Anglo-Boere-Oorlog; literêre erfenis
- Natuurtoerisme (skilpaaie, rivierkonyne, vetplante, wild)
- Landbou-erfenis (merino, angora)
- Astronomie
- Politieke strydgeskiedenis (“struggle history”)
- Sending- en kerkgeskiedenis
- Begraafplaas- toerisme
- Avontuurtoerisme
- Die Mense van die Karoo (karretjiemense).

’n Opname van die aantreklikhede in al die Karoodorpe is deur die Universiteit van die Vrystaat onderneem. Ongeveer 1,000 aantreklikhede is geïdentifiseer.

Elke Karoodorp het sy eie kenmerkende karakter en bates (sien die volledige Karoo-Toerisme dokument vir ’n tabel van dorpe en hulle bates). ’n Veel deegliker vergelyking moet nog onderneem word om dit vir die dorpe moontlik te maak om in samewerking met mekaar bemarkingstelsels te ontwikkel.

6.3 Vooruitsigte op Groei in die Toerisme

In 2010 is die eienaars van gastehuse in 12 Karoodorpe ondervra. Die oorgrote meerderheid (93%) was seker dat toerisme sou toeneem. Die redes wat hulle verskaf het was die uniekheid, erfenis en egtheid van die streek, sy klimaat en natuurskoon, sy ongerepte afgesonderdheid en stilte, sy veiligheid, ekotoerisme,

Karoogasvryheid, nismarkte, bekostigbaarheid, die in-migrasie van stadsmense, die groei van landelike toerisme, belangrike groot projekte, bv. SALT en SKA, en 'n hoë vlak van belegging in sekere sektore.

6.4 Hoe Kan Toerisme In Die Karoo Verbeter Word?

In 'n opname is 260 Karoo-toeriste gevra watter infrastruktuur in die streek opgegradeer behoort te word. Merkwaardig genoeg het 21% van die respondente spontaan geantwoord dat die Karoo 'moet bly soos wat dit is'. Ander mense het egter 'n behoefte genoem aan beter paaie, padtekens, piekniekplekke, vakansie-orde, OTMs, mediese dienste, restaurante en openbare vervoer. Verskeie mense was bekommerd oor armoede in die Karoo bekommerd, maar net een het kommer oor veiligheid uitgespreek.

6.5 Hoe Ver Het Karoo-Toerisme Ontwikkel?

Wat toerisme-ontwikkeling betref, verteenwoordig Suid-Afrika in die algemeen, en die Karoo spesifiek, 'n 'vroë stadium'. Kenmerke van toerisme op hierdie stadium is:

1. Die potensiele toerisme-mark is redelik oningelig en prys-onsensitief. Nuuskierigheid en ontdekkingslus lok besoekers na die gebied.
2. Die produk is baie afhanklik van die individuele entrepreneur, op klein skaal en baie divers;
3. Daar is min mededingers;
4. Die bemarkingsorganisasie is ongesofistikeerd en geïsoleerd en beskik oor min gespesialiseerde inligtingverskaffers.

In sekere opsigte beweeg die Karoo egter na die middelstadium van toerismeontwikkeling, met meer kompetisie, die vinnige toetrede van nuwe toerisme-verskaffers, en die verskyning van gekonsolideerde pogings (bv bemarking en roetes). Wat nou benodig word is konsolidasie van die toerismestreek rondom 'n paar kerntemas, en die ontwikkeling van nuwe toerismewaardekettings óm hierdie temas. Dit sal die vestiging van nuwe entrepreneurs wat dienste aan toeristeondernemings verskaf, aanmoedig, sowel as toeriste-ondernemings wat dienste aan ander sakeondernemings verskaf. Hierdie sal plaaslike ekonomiese kragte versterk, en werksgeleenthede skep.

7. Die Toerisme-Mark

Daar is verskeie sleutelkenmerke van Suid-Afrikaanse toerisme wat in enige Karoo Toerisme-strategie ingesluit moet word.

7-1 BINNELANDSE TOERISME

Binnelandse toerisme het in 2007-8 afgeneem. Daar was omtrent 20% meer toeriste, maar die aantal reise het met 8,4% verminder. Die gemiddelde besteding per reis het egter van R550 na R780 gestyg. Hierdie neiging mag die Karoomark bevoordeel, want die streek is verder van die groot stede geleë, en dus geskik vir minder maar langer besoeke. As bekostigbare bestemming het die Karoo ook 'n voorsprong.

Reise deur binnelandse toeriste het ook relatief min groei getoon, vergeleke met aankomste per lug (wat tussen 2005 en 2007 met omtrent 10% toegeneem het).

Besoeke aan Vriende en Familie (BVF) is steeds die hoofrede vir binnelandse reise (25-30%), maar vakansiereise het van 3% in

2003 tot 16% in 2008 toegeneem. Dit blyk die neiging vir die toekoms te wees. Die lengte van vakansieverblyf is nog steeds baie kort ('n gemiddelde van 5 dae), dus moet mense dalk aangemoedig word om langer by lae-koste bestemmings te bly.

BVF bly die belangrikste vorm van akkommodasie (omtrent 80%), terwyl *betaalde* akkommodasie deur selfvoorsienende akkommodasie (4% van nagte), hotelle (4%), gastehuse (3%), B&Bs (3%) en wildsparke en 'backpackers' (0,5%) gedeel word.

Verbeterde geografiese verspreiding van toerisme is 'n sleuteldoelwit van die Regering. Dit beteken dat relatief onontdekte streke soos die Karoo bevorder moet word.

Die hoof-aktiwiteite van binnelandse toeriste behels sosiale aantreklikhede, inkopies, strande, naglewe en casinos, waarvan geeneen baie relevant is tot die Karoo nie. Maar verskeie ander toerisme-prioriteite is wel geskik vir die Karoo: Natuurskoon, wildbesigting en besoeke aan plekke van kulturele belang.

Binnelandse reise is baie seisoenaal en word grootliks deur die skoolvakansies bepaal. Die gereelde reise van Gauteng se toeriste deur die Karoo, na bestemmings by die see, by 'n belangrike bron van toerisme-inkomste. Die Karoo-mark is kleiner, ouer, meer selektief, deur meer welgestede mense, en toeriste bly langer op reis.

7-2 BUITELANDSE TOERISME

Die aantal toeriste in Suid-Afrika uit die buiteland het konstante groei getoon, van 2,5 miljoen in 1993 tot 9,9 miljoen in 2009. Die Verenigde Koninkryk, VSA en Duitsland bly die hoof langafstandmarkte, gevolg deur Nederland, Frankryk en Australië. Terwyl die binnelandse mark vir 75% van die *volume* van toerisme

verantwoordelik is, dra buitelandse toerisme 79% van toerisme-inkomste by, waarvan toeriste wat per vliegtuig aankom, 52% van die inkomste verskaf.

Navorsing het getoon dat buitelandse toeriste aan minder outentieke ervarings blootgestel word as wat hulle begeer. Dit is 'n groot leemte wat die Karoo kan vul.

7-3 Profiel van Toeriste in die Karoo

n Opname van 183 toeriste in Mei-Augustus 2010 in 12 Karoo-dorpe het bevind dat 53% aan die ouderdomsgroep 36-55 behoort het. 'n Addisionele 19% was 56 jaar of ouer. Net 17% was in die ouderdomsgroep 26-35. Die toeriste was mense met goeie kwalifikasies. Meer as die helfte (60%) was in die middel-inkomste groep; 12% was meer welgestel, en 12% was afkomstig van die laer inkomste groep.

Diegene wat die Karoo besoek is gewoonlik ouer as 30 en mense wat daarvan hou om nuwe en outentieke plekke te besoek. Maar die wye verskeidenheid toeristaantreklikhede het die potensiaal om 'n groter verskeidenheid van besoekers te lok – indien 'n verenigde benadering tot die bemarking van toerisme gevolg word.

8. Toerismestategieë en Doelwitte

8-1 Samewerking tussen Streeks-Agentskappe

Die Karoo Streekstrategie benodig die samewerking van die vier Karoo-provinsies. Dit sal op twee vlakke moet geskied: 1) Strategiese beplanning van toerisme in the provinsiale

Departemente van Toerisme, en 2) Die bemerking van Toerisme deur die provinsiale Toerisme-agentskappe. Vervolgens sal samewerking onder Karoo Distriksmunisipaliteite, Plaaslike Munisipaliteite, en hul onderskeie toerismekommittees verkry moet word. Stuksgewys kan samewerking dan tussen Karoodorpe ontwikkel word, gebaseer op gesamentlike temas.

'n Geskikte instelling sal geskep moet word. 'n Karoo Toerisme-agentskap moet gesteun deur nasionale regeringsdepartemente en ontwikkelingsinstansies.

Met inagneming van die status van Beaufort-Wes as die hoofdorp in die Karoo, mag dit dalk ideaal wees om die Hoofkantoor van die Karoo Toerisme-agentskap daar te plaas, met satellietkantore op ander dorpe. Hierdie voorgestelde Karoo Toerisme-agentskap sal dan die leierskap neem met die implementering van die Karoo Toerisme-strategie. Die leiers van die Agentskap behoort baie ervare in die ontwikkeling van toerisme-ontwikkeling en –bemerking te wees, ondersteun deur 'n sterk Raad wat die Provinsies en Distriksmunisipaliteite verteenwoordig. Die Agentskap sal genoegsame befondsing van die nasionale en provinsiale owerhede, sowel as in die vorm van ledegeld en skenkings van privaatinstansies moet ontvang.

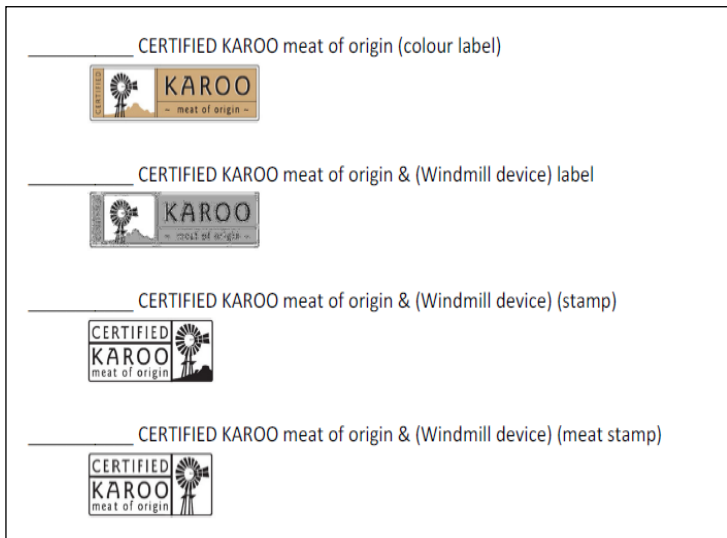
8.2 Streekshandelsmerk

Die Karoo Toerisme-agentskap sal sy eie handelsmerk, gebaseer op die handelsmerk-argitektuur van Suid-Afrikaanse Toerisme, registreer. Dit mag ook 'n Karoo Toerisme Sertifiseringsstempel insluit wat outentieke Karoo-produkte waarborg. 'n Sertifiseringshandelsmerk is reeds deur die Karoo Ontwikkelingstigting vir die Karoo Lam en Karoo Crafts projekte geregistreer. Nou moet 'n studie van bestaande

Karoohandelsmerke onderneem word, om sinergieë tussen hulle onderling te bevorder. 'n Oorkoepende Karoohandelsmerk mag nie afbreuk aan streekroete- of nistoersime-handelsmerke doen nie.

Die volgende handelsmerke is alreeds deur die Karoo Ontwikkelingstigting geregistreer, namens die mense van die Karoo:

Karoo Lam:



Karoo Handwerk:



8.3 Ontwikkeling Van Streektoerisme-Produk

'n Bespreking rondom die identifisering van toerismeprodukte op streekskaal sal moet plaasvind. Daar kan aan toerismediensverskaffers die taak toegewys word om uitvoerbaarheidsstudies te onderneem om streekwye aantreklikhede en produkte te identifiseer. Daarna sal skenker- en regeringsbefondsing vir die ontwikkeling van die produk en vir opleiding van personeel verkry moet word.

Werkswinkels en vergaderings sal toerismoeretes moet definieer, en skakeling tussen akkommodasie-inrigtings en verskaffers onderling bewerkstellig. Die proses sal ook bestaande staats- en privaatbates soos munisipale kampeerterreine en oorde moet identifiseer wat dalk vernuwing en verbeterde bemarking benodig.

'n Databasis van meer as 1,000 Karoo toerisme-aantreklikhede bestaan reeds, maar belangrike nuwe toerismesektore wag om geïdentifiseer en bevorder te word. Voorbeelde is Olive Schreiner, NP van Wyk Louw, die Vryheidstryd (soos in die Colesbergse Museum), Anglo-Boer-oorlog toerisme (blokhuise en kommando-roetes), Jag, Bergfietsry, Rotskuns en Cuisine.

8.4 Gedeelde Streeksbemarking

'n Gesamentlike bemarkingsstrategie tussen die vier provinsies word benodig. Dit moet "horisontale" samewerking tussen provinsies, streeksorganisasies, en munisipliteite aanmoedig, sowel as "vertikale" samewerking tussen nasionale, provinsiale en munisipale instansies - veral in sake soos bemarking en navorsing.

8.5 Ontwikkeling Van Toerisme-Vaardighede

Plaaslike inwoners sal in die gasvryheidsindustrie, as toergidse en chefs opgelei moet word, sowel as aanvullende aktiwiteite soos vervoer, bouwerk en restourasie. Die Toerisme- en Gasvryheid Sektorale Onderwys en Opleidings-agentskap (SETA) sal 'n vennoot van die Karoo Toerisme-agentskap moet wees om opleidingsprogramme te koördineer en befonds.

8.6 Bevordering Van Kmo's

Klein en Medium Ondernemings (KMOs) is van kritieke belang vir die ekonomie, aangesien hulle die belangrikste skeppers van werkgeleenthede is. In die Karoo Toerisme-strategie moet duisende KMO's per produk en sektor geïdentifiseer word, sodat gedeelde bemarkings- en ondersteuningsstelsels geskep kan word om hulle te help om hulle volle potensiaal te bereik.

8.7 Bevordering Van Mikro-Ondernemings

Mikro-ondernemings kan baiekeer spesifieke nismarkte identifiseer, gebaseer op die werk wat net die ondernemer met 'n paar werkers of helpers kan doen. Dit sal in die Karoo Toerismestategie belangrik wees om vir arm mense toegang tot die sakestelsel kan verkry. Hierdie geleenthede mag heel moontlik in die handwerk- en spysenieringssektore wees. Soos wat die toerisme-sektor uitbrei, sal daar 'n toenemende aanvraag na ambagsmanne (bouers, skilders, loodgieters, elektrisiëns) wees om die gastehuse en restaurants te onderhou.

8-8 Bevordering van Toepaslike Infrastruktuur

Karootoerisme benodig verskeie hulpmiddele:

- Duidelike reklametekens;
- Padonderhoud;
- Onderhoud van dorpstrate;
- Opknapping van Sakesentra in Karoo dorpe;
- Aantreklikhede wat goed bestuur word;
- Munisipale dienste, en
- Veilige parkeringsfasiliteite.

Munisipaliteite sal hierdie sake in hul geïntegreerde Ontwikkelingsplanne moet insluit, om befondsing van hul provinsies te verkry vir die nodige opknapping en onderhoud.

8-9 Sentraalgeleë Lughawe

Die Karoo benodig 'n doeltreffende stelsel van lug-, pad- en spoorvervoer. 'n Belangrike vraagstuk is die skepping van 'n lughawe met 'n reënvaste aanloopbaan, nagligte en geskeduleerde vlugte. So 'n lughawe in sentraalgeleë Beaufort-Wes sou met ander Karoolughawens verbind kon word. Die voordeel van geskeduleerde vlugte is dat gehuurde motors verskaf kan word by 'n sentrale lughawe. Die Beaufort Wes lughawe kan ook skakel met kleiner Karoo lughawens.

8-10 Spesiale Toerisme-Inisiatiewe

Die volledige Karoo Toerisme-Strategie lys 16 moontlike spesiale programme wat geaktiveer kan word om toerisme in die Karoo te bevorder, onder andere 'n jaarlikse Karooweek, 'n kalender van

Karoo-gebeurtenisse, feeste, videos, data-basisse van aantreklikhede, en die ontwikkeling van die Oranjerivier en sy damme as 'die Karoo Riviera'.

8-11 Navorsing rakende Karoo-Toerisme

Navorsing moet gedoen word oor:

- Inligting oor die besigheidsfeer in die Karoo
- Databasisse
- Tendense in Karoo toerisme
- Impak op die omgewing van toerisme, mynbou en vervoer
- Impak van toerisme op die plaaslike ekonomie van Karoo dorpe
- Toerisme opleidingsstelsels
- Veranderende persepsies oor toerisme in die Karoo.

9. Volgende stappe

Stap 1: Skep informele netwerke oor provinsiale en distriksgrense heen.

Stap 2: Onderneem 'n volle Karoo toerismeproduk-oudit en ontleed problematiese aspekte in die Karoo

Stap 3: Fasilitering deur die nasionale Departement van Toerisme van 'n interprovinsiale Karoo Toerisme-strategie

Stap 4: Ondertekening van 'n interprovinsiale Memorandum van Samewerking

- Stap 5: Skep meer formele ko-ordinasie van instellings, deur middel van samewerkingsooreenkomste
- Stap 6: Bevorder die ontwikkeling van 'n Karoolughawe in Beaufort-Wes.