KAROO TOURISM STRATEGY

Compiled by:

Karoo Development Foundation
karoo@intekom.co.za

14 October 2012
Revised 1 September 2013

TABLE OF CONTENTS

FOREWORD: KAROO TOURISM STRATEGY DEVELOPMENT 4
1. THE PURPOSE OF THE KAROO TOURISM STRATEGY 6
2. DESERT TOURISM 7
2.1 Changing tourism patterns **7**
2.2 The Karoo: South Africa's premier desert destination **8**
2.3 Political jurisdictions in the Karoo **9**
2.4 Sub-regions and towns in the Karoo **9**
2.5 The population of the Karoo **10**
2.6 General characteristics of the karoo **11**
3. GOVERNMENT TOURISM STRATEGIES 13
3.1 The presidential outcomes **13**
3.2 The new growth path **15**
3.3 NationalPplanning Commission **16**
3.4 Industrial policy action plan (IPAP2)**16**
3.5 National Tourism Sector Strategy (NTSS) **17**
3.6 Draft rural tourism strategy **19**
3.7 SA Tourism **19**
4. KAROO PROVINCIAL STRATEGIES 21
4.1 Western Cape **21**
4.2 Eastern Cape **23**
4.3 Northern Cape **25**
4.4 Free State **26**
4.5 Conclusion **27**
5. KAROO TOURISM PRODUCT SUPPLY 28
5.1 Accommodation establishments **28**
5.2 Tourism activities and attractions **28**
5.3 A comparison of Karoo towns **30**
5.4 Tourism growth prospects **32**
5.5 How can tourism in the Karoo be improved?**32**
5.6 How developed is karoo tourism? **33**
6. TOURISM DEMAND 35
6.1 The South African tourism context **35**
6.1.1 Domestic tourism 35
6.1.2 Foreign tourism 36
6.2 Profile of the Karoo tourist **37**
6.3 The Karoo tourist **38**
6.5 What do tourists like to do in the Karoo? **40**
6.6 What do tourists find most appealing about the Karoo? **41**
6.7 Conclusion **42**
7. TOURISM STRATEGIES AND OUTCOMES 43
7.1 Regional Tourism institutional alignment **43**
7.2 Regional branding **43**
7.3 Regional tourism product development **45**
7.4 Shared regional marketing**45**
7.5 Tourism Skills Development **45**
7.6 Promoting sme's **46**
7.7 Promoting micro-enterprises **46**
7.8 Promoting appropriate infrastructure **47**
7.9 Centrally located airport **47**
7.10 Special tourism initiatives **48**
7.11 Karoo tourism research **48**
8. NEXT STEPS 49
REFERENCES 50

List of Tables

Table 1: Population, unemployment and poverty in Karoo District and Local Municipalities 10
Table 2: Guest houses and beds in a Karoo sample 28
Table 3: Categories of Karoo attractions 29
Table 4: Detailed categories of Karoo attractions 29
Table 5: Attractions in Karoo towns 30
Table 6: How can tourism infrastructure in the Karoo be improved? 33
Table 7: Reasons for visiting the Karoo 38
Table 8: Desire to return to the Karoo 38
Table 9: Types of motivations to stay over in the Karoo 39
Table 10: Motivations for staying over in the Karoo 40
Table 11: What do tourists like to do in the Karoo? 40
Table 12: The Karoo as a future destination 41
Table 13: Types of attractions in the Karoo 41
Table 14: Prevalence of attractions in the Karoo 42

List of Figures

Figure 1: The Karoo in the context of South Africa 8
Figure 2: Karoo Highways 12
Figure 3: Karoo Lamb branding 44

Proposed VISION of the proposed Karoo Tourism Agency:

The Karoo as a premier world-class, sustainable desert tourism destination.

Proposed MISSION of the Karoo Tourism Agency:

Working to promote regional collaboration on tourism product development, marketing, business networking, policy co-ordination, economic empowerment, heritage preservation, ecological management, and community empowerment.

Foreword: Karoo Tourism Strategy Development

This Strategy has been several years in the making. It was based on several research papers written under the auspices of the Arid Areas Research Programme (www.aridareas.co.za), which includes researchers from a range of universities and private companies. The issue of Karoo tourism was first discussed at the Karoo Development Conference in Graaff-Reinet in March 2009; thereafter at the Karoo Tourism Conference at Gariep Dam in November 2009; and subsequently at the Hanover Tourism Workshop (January 2010), a series of workshops (Victoria West, Gariep Dam, Graaff-Reinet and Beaufort West, in mid-2010), and finally the Colesberg Tourism Workshop (May 2011).

During 2010, a scan of provincial and local tourism plans in the Karoo was conducted. In addition, four Karoo surveys were conducted:

- A survey of 210 Karoo tourists who overnighted in the Karoo
- A survey of 30 Karoo guest houses
- Interviews with tourism and planning officials in 10 Karoo municipalities
- A survey of 160 Karoo crafters
- A survey of Karoo businesses' views regarding an airport in Beaufort West.

Tourism consists of more than overnight stays. Therefore, a thorough scan of Karoo websites was conducted, to compile an extensive data-base of Karoo attractions. From the vast number of Karoo attractions, it becomes evident that the Karoo offers major tourism appeal, which can be marketed on a national and international scale. The tourism offerings of the Karoo are extensive, diverse and of an extraordinarily high standard. In addition, in many places, the original atmosphere of a "small Karoo dorp" or a remote Karoo farm have been maintained, offering visitors a peep into a bygone era and enhancing the value of heritage attractions. The challenge is to promote tourism without damaging this authentic quality.

At the same time, there are major developmental needs in the Karoo, in terms of unemployment, a lack of skills, social inequalities, poverty and for many people, a sense of being marginalised from the rest of mainstream South African development. These developmental priorities will have to be addressed in the Strategy.

A further theme, which occurs throughout the Strategy, is that regional development (including tourism, but also other sectors such as agriculture and transport) has been bedevilled by an excessive government focus on provincial boundaries, and to a lesser extent, district and local municipal boundaries. This means that synergies across boundaries are very hard to identify and promote, even when they are extremely obvious to local communities and private sector investors or operators.

This Strategy is therefore an attempt to show how the assets of a remote region can be maximised, if there is a conscious and deliberate focus on promoting common features, such as the environmental biome, the local topography, or the local culture and heritage. We therefore downplay the difference between the Eastern Cape, Western Cape, Northern Cape and Free State portions of the Karoo. Clearly, these portions will be impacted differently by their provincial policies, but a common approach will maximise their strengths, promote a "critical mass" of tourism product, enable them to share key strategic assets, and enable a common tourism brand.

Once the first draft of the Strategy was compiled, it was workshopped in late October 2010 with stakeholders in several Karoo towns: Gariep Dam, Sutherland, Carnarvon, Victoria

West, Graaff-Reinet and Beaufort West. In this process, a total of Karoo 600 people have been consulted, which included municipal officials, tourism service providers, planners and community organisations.

The Strategy has been compiled under the auspices of the Karoo Development Foundation (KDF), in partnership with the University of the Free State. The Mission of the KDF is: "To create a sense of local ownership and pride in the unique and diverse cultural, architectural and natural heritages of the Karoo, promote regional cohesion in the Karoo, and promote sustainable socio-economic development in the Karoo."

The Goals of the Trust are the following:

1 The Karoo Trust shall create opportunities for local people to take an active interest in the preservation of their architectural, natural, cultural and archaeological heritage.
2 The Trust shall promote innovative, imaginative and effective economic and social development and investment programmes to enhance the quality of life of residents of the Karoo, with due sensitivity for the natural and cultural heritage of the region.
3 The Trust shall encourage inclusive and people-centered development strategies, which will promote employment, emergent enterprises, and will alleviate poverty in Karoo communities.
4 The Trust shall endeavour to preserve the ecological heritage of the Karoo.
5 The Trust shall facilitate co-operation amongst government, municipal, private and civil society organisations in the Karoo, and assist them to achieve their developmental goals.
6 The Trust shall promote research, publications and exchanges of information and best practice solutions to arid areas problems.
7 The Trust shall register and protect generic names and geographical products, developments, fauna, flora and property on behalf of the beneficiary community in the Karoo.
8 If necessary, the Trust may acquire buildings or land of historical, architectural or ecological importance, and renovate or rehabilitate land or landscapes, to preserve the heritage of the culture and history of the people of the Karoo.
9 If necessary, the Trust may acquire displays, books, artifacts, photographs, mementoes and all such objects pertaining to the natural environment, historical, social, political and cultural nature and development of the area, in order to promote the preservation of such resources;
10 The Trust shall promote a conservation ethic within the Karoo community, and foster a greater understanding of the natural environment, values, local products, history, and architecture of the Karoo community;
11 The Trust shall to liaise with other similar organisations or trusts for the exchange of knowledge, exhibitions or support.
12 The Trust shall facilitate international contact and exchanges to promote sustainable development in the arid and semi-areas.
13 In endeavouring to achieve the Trust's aims and objectives, the Trustees shall always respect the rights and wishes of the Karoo community.
14 The Trust shall be pro-active in obtaining and reinforcing moral and financial support for itself. In this regard, the Trustees shall industriously seek the contributions of all the people of South Africa, including both the Public and Private sectors. Where such support is given, the Trustees shall have an obligation to account for it.

1. The purpose of the Karoo Tourism Strategy

At its meeting in Hanover in January 2010, the Karoo Development Foundation trustees agreed to promote tourism in the Karoo as a region. This was one of several major KDF initiatives, focusing on Karoo Lamb and Karoo Crafts, which highlighted the need to promote and "brand" specific Karoo niche products and assets.

The purpose of this Karoo Tourism Strategy is:

- To present useful information and research which will influence Karoo tourism in the future
- To draft key strategic directions for a shared, interprovincial Karoo tourism strategy
- To consult as widely with Karoo tourism stakeholders, provincial governments and municipalities, as possible, given the constraints of time, funding and distance
- To disseminate the Draft Strategy widely, for additional inputs by stakeholders
- To make the case for the need for an airport in the Karoo, with scheduled flights – in particular, at the centrally-located Beaufort West airport, but with "hub and spoke" connections with other Karoo airports
- To draft a funding proposal for a Karoo Tourism Agency
- To lay the basis for additional research (quantitative and qualitative) on tourism and associated sectors in the Karoo, so that this strategy can be revised by the end of 2011
- To lay the groundwork for the Second Karoo Development Conference in October 2012.

2. Desert tourism

The Karoo region should be understood as South Africa's key desert asset. This section examines the nature of our desert region.

2.1 CHANGING TOURISM PATTERNS

Tourism patterns are changing. More ageing people and more young people are travelling. More people are interested in "volunteering" (combining unique travel opportunities with meaningful volunteer work); gap years are not only taken by the youth, and travellers are looking for authentic and niche experiences, among other trends. The demand for mass-based leisure tourism is being replaced by a desire to connect emotionally with destinations, local people and local cultures (NTSS 2011:9).

Desert tourism is becoming a major international phenomenon. It is associated with pristine landscapes, solitary experiences, beautiful sunsets and clear night skies. Desert tourism has become increasingly significant throughout the world, to the extent that the United Nations' World Tourism Organisation has published a document entitled *Sustainable Development of Tourism in Deserts – A Guide for Decision Makers* (2007), which states the following:

> "The supply of desert tourism products has visibly increased and been offered to a wider market over the last decade or so. The appeal of deserts can largely be explained by the image of purity and serenity associated with them, and by travellers' quest for simplicity and well-being."

This suggests that desert tourism is going to grow, and that South Africa should maximise the benefit of tourism in its own desert, the Karoo.

The Karoo offers nothingness, which is increasingly valuable, in terms of space, silence and solitude. Urban people live in stressed societies (road rage, traffic, shooting sprees), and the Karoo offers a healing experience.

Deserts have amazing healing properties. Not only has the climate of the Karoo become a legendary prescription for physical ailments, but it is also increasingly been recognised as a balm for the soul. Increasingly, the attractiveness of the Karoo as a vast, pristine space, is becoming recognised. "Nothingness is a commodity that can sell" (Myles 2009). Numerous iconic phrases describe the uniqueness of the Karoo: "The Karoo is where the land meets the sky"; "The Karoo is where you can hear God think" (Myles 2009).

Desert tourists are a new type of highly selective travellers. They seek spiritual renewal; they enjoy direct contact with local communities; they enjoy local gastronomy; they enjoy local natural experiences; they are inspired by local heritage and archaeological sites; and they want to learn more about local culture and crafts. Good gravel roads are increasingly popular, because they signify pristine and remote landscapes.

There is a strong move to interactive tourism, not just being an observer in a pre-made landscape. People want to get out of their vehicles and go walking about in nature. The Karoo offers safe and appealing landscapes for people to lose themselves in.

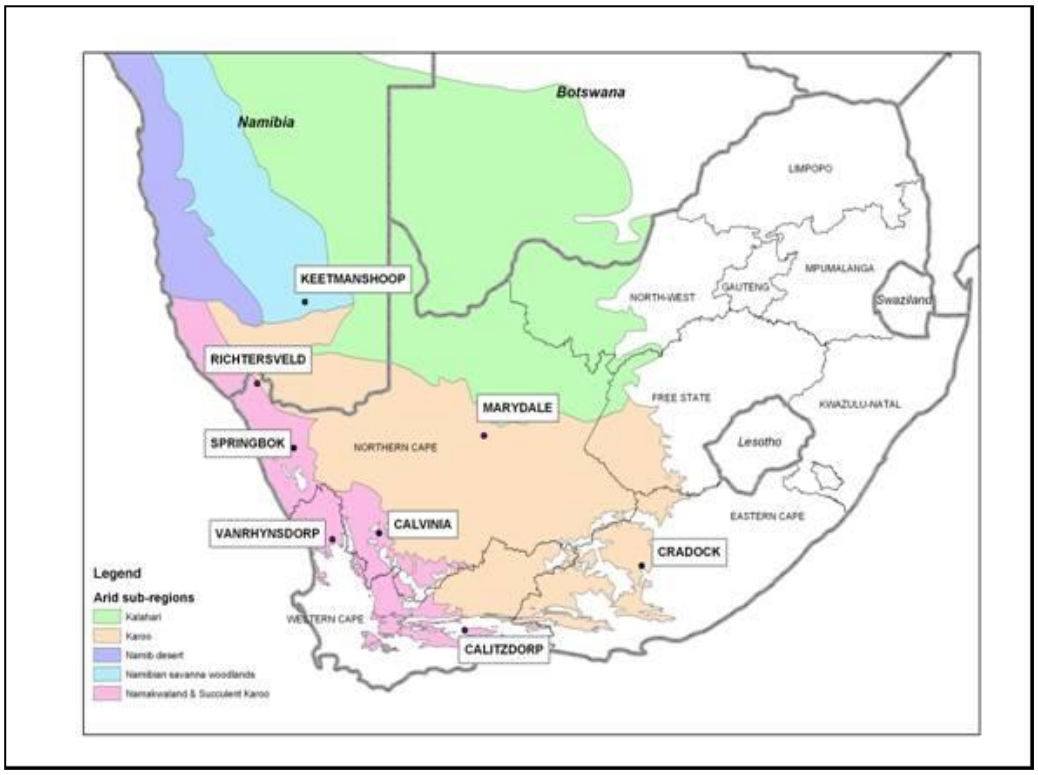
It is in this context that the Karoo Tourism Strategy sets out to show that the Karoo region, which comprises about 40% of South Africa's land surface, is a major new tourism opportunity. This would require collaboration across the four Karoo provinces, 12 District Municipalities and 24 Local Municipalities in the Karoo. It will also show that Karoo tourism can play an important part in South Africa's rural development strategy, to promote

entrepreneurship and jobs.

2.2 THE KAROO: SOUTH AFRICA'S PREMIER DESERT DESTINATION

The Karoo comprises a major part of South Africa's land surface. These areas are the Great Karoo, the Little Karoo, and Namaqualand (the succulent Karoo), and straddle four provinces: Western Cape, Eastern Cape, Northern Cape, and Free State. The Karoo also stretches into the southern part of Namibia (Karas region)

Figure 1: The Karoo in the context of South Africa



Map: The Great Karoo and the Succulent Karoo

The Karoo can be regarded as the region south of Bloemfontein, until Worcester in the Western Cape; and on an east-west axis, from Cradock in the east to the Atlantic Coast in the West.

There is a distinct difference in vegetation between the Great Karoo (which has a preponderance of small bushes and grass) and the Succulent Karoo (which is a remarkable floral kingdom based on succulent plants).

The topography of the succulent Karoo tends to consist of rocky outcrops, in contrast with th Central Karoo, which consists primarily of grassy plains and wooded hillsides.

Both areas are characterised by significant mountain ranges, such as the Sneeuberg in the eastern Cape Karoo, the Swartberg in the southern Great Karoo, and the Escarpment near Vanrhynsdorp. The plains are interspersed with steep mountains and hills, offering splendid "viewsheds".

2.3 POLITICAL JURISDICTIONS IN THE KAROO

There are five "core" District Municipalities in the Karoo:

1. **Cacadu DM** (Graaff-Reinet area of the Eastern Cape), consisting of Camdeboo LM (Graaff-Reinet), Ikwezi LM (Jansenville), Baviaans LM (Willowmore area) and Blue Crane LM (Somerset East)
2. **Central Karoo DM** (Beaufort West area of the Western Cape), consisting of Beaufort West LM, Prince Albert LM and Laingsburg LM
3. **Pixley ka Seme DM** (De Aar area), including Emthanjeni LM (De Aar area), Umsobomvu LM (Colesberg area), Rhenosterberg LM (Vanderkloof area), Kareeberg LM (Carnarvon area), Ubuntu LM (Victoria West area), Thembelihle LM (Hopetown area) and Siyathemba LM (Prieska area).
4. **Namakwa DM** (Springbok area) (primarily Hantam LM (Calvinia area), Kamiesberg LM (Garies area), Karoo-Hoogland LM (Sutherland area), Nama Khoi LM (Springbok area) and Richtersveld LM (Port Nolloth area).
5. **Xhariep DM** (southern Free State), primarily Kopanong LM (Trompsburg and Gariep Dam area) and Letsemeng LM (Koffiefontein area)

Of course, the arid areas do not dovetail neatly with these district boundaries. In addition, the Karoo includes several other Local Municipalities:

- Inxuba Yethemba LM (Cradock area, part of Chris Hani District in the Eastern Cape)
- Gariep LM LM (Burgersdorp area, part of Ukhahlamba District in the Eastern Cape),
- Kannaland (Ladismith area, part of Eden District in the Western Cape)
- Oudtshoorn iLM n the Western Cape (part of Eden District)
- Matzikama LM (part of the West Coast District in the Western Cape)
- Kopanong LM (Trompsburg area) and Letsemeng (Koffiefontein area) in the Free State (both part of Xhariep district)

2.4 SUB-REGIONS AND TOWNS IN THE KAROO

The Karoo is divided into several historical sub-regions, such as the Camdeboo (Graaff-Reinet area), the Koup (Prince Albert, Leeu-Gamka, Laingsburg), the Bo-Karoo (De Aar area), the Noorsveld (Jansenville area) the Tankwa-Karoo (south of Sutherland), and of course Namaqualand and the Little Karoo.

These regions tend to have distinctive ethnic histories and architectural styles.

The Great Karoo itself is often referred to as the Nama Karoo, which differentiates it from the succulent Karoo (Namaqualand and Little Karoo).

The Karoo consists of the following 66 towns:

(1) Nama Karoo:

Northern Cape: Calvinia, Williston, Carnarvon, Vanwyksvlei, Vosburg, Prieska, Hopetown, Britstown, De Aar, Victoria West, Fraserburg, Richmond, Colesberg, Orania, Phillipstown, Petrusville, Hutchinson, Griquatown, Sutherland, Loxton, Williston, Hanover, Strydenburg, Marydale.

Eastern Cape: Noupoort, Middelburg, Graaff-Reinet, Nieu-Bethesda, Cradock, Aberdeen, Steytlerville, Pearston, Somerset East (bordering on Midlands),

Willowmore, Cookhouse, Venterstad, Hofmeyr, Steynsburg (bordering on Sneeuberg), Klipplaat

Western Cape: Beaufort West, Laingsburg, Matjiesfontein, Murraysburg, Prince Alberg, Leeu-Gamka, Merweville, Tankwa-Karoo area (north of Tulbagh).

(2) ***Klein-Karoo:*** Oudtshoorn, Uniondale, Ladismith, Calitzdorp, De Rust, Oudtshoorn, Vanwyksdorp, Zoar, Haarlem, Montagu.

(3) ***False Karoo (Skynkaroo):*** *Free State:* Philippolis, Fauresmith, Luckhoff, Koffiefontein, Oppermansgronde, Bethulie, Gariep Dam, Springfontein, Trompsburg, Edenburg

This is a remarkable number of settlements, and offer a wide range of architectures and history. They also differ in terms of their economic base. Some towns are located on highways, and serve primarily the travellers on the main routes; others are located in more remote areas and have either specialised in sectors such as agriculture or tourism. Most towns are based on the livestock economy (wool sheep, mutton sheep, goats and mohair), but there are towns such as Prince Albert which produce crops and fruit.

2.5 THE POPULATION OF THE KAROO

Based on various population estimates, the population of the Karoo can be calculated as follows:

Table 1: Population, unemployment and poverty in Karoo District and Local Municipalities

Main District Municipalities	**Population**	**% urban**	**% Proportion unemployed**	**%House-holds living in poverty**
Namakwa DM	108 111	48.1	28.5	34.1
Central Karoo DM	60 484	72.5	36.2	27.3
Cacadu DM	388 207	69.3	35.4	44.4
Pixley ka Seme DM	164 603	60.8	37	43.5
Xhariep DM	135 248	66.6	35.3	50
Additional LMs				
Matzikama LM	**50 000**	**51.7**	15.8	54
Kannalamd LM	21 105	39		
Oudtshoorn LM	84 692	83	34	
Gariep LM	32 424			58
Inxuba Yethemba LM	60 292			63
TOTAL POPULATION	**1 105 166**			

Notes to the table:
1. Namakwa DM figures include population in the Pofadder/Pella area, which is not in the Karoo.
2. Cacadu DM figures include population in the Sundays River area and the coastal area west of Port Elizabeth, which is not located in the Karoo.
3. Figures for Pixley ka Seme DM include statistics for the Douglas area, which is strictly speaking not in the Karoo.
4. These figures include the Mohokare LM (Zastron area), which is not in the Karoo, although the more westerly areas of Mohokare (such as Smithfield) can be regarded as "borderline Karoo".
5. The Kalahari area has been excluded from these calculations (Siyanda DM around

Demographic data for the various Karoo regions are not strictly comparable, as different sources are used by different municipal Integration Development Plans. Furthermore, the

most recent census figures which are available are from the 2001 census, which makes current estimates 10 years out of date. There may well have been significant population and economic shifts since then.

Significantly, there are about 1.1 million people in the Karoo, who are likely to benefit – directly or indirectly - from the Karoo Tourism Strategy.

2.6 GENERAL CHARACTERISTICS OF THE KAROO

The arid areas are sparsely populated, and in some areas, the population density is less than 1 or 2 person per km2. This has contributed to their political insignificance, as the various provincial and national governments have invariably given more attention to their more populous regions.

Most of the arid towns have grown in size, due to in-migration, and because of the South African social grant system (which encourages people to stay where they are). But the urban economy of the arid areas is very fragile. Typically, the business sector is small, and there is virtually no industrial base. There is an incipient informal sector in most towns, often linked to pension pay-out days.

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 of its socio-economic profile:

- Poverty levels are high, due to high levels of unemployment, and increasing rates of illness (HIV/AIDS and TB)
- Communal farming on municipal peri-urban land is creating environmental challenges
- A large proportion of income is derived from social grants, with social consequences that are not fully understood
- Local economies of small towns are characterised by weak multipliers, because a great deal of purchasing power is spent in the larger centres, or metropolitan areas situated outside these areas
- The influx of migrants from the farms to the towns, and the migration from the more densely populated areas in the Eastern Cape towards the Karoo, are creating immense pressures on the existing infrastructure
- Due to the arid nature of the area, surface and underground water supplies are insufficient to provide higher levels of infrastructure (such as waterborne sanitation), which creates grievances and resentment
- The conditions of life of remote settlements of farm workers tend to be poor, with low mobility, and difficult access to health, education, recreation and shopping amenities
- HIV/AIDS levels are reputed to be high, particularly on national transport routes, and mortality rates are already reflecting this
- There is an out-migration of skilled people, due to a lack of local economic opportunities.
- Increasing aridity, due to global warming, may lead to rising unemployment, declining underground water levels, and greater difficulties for commonage farmers.

Nevertheless, the arid areas have important economic and social assets:

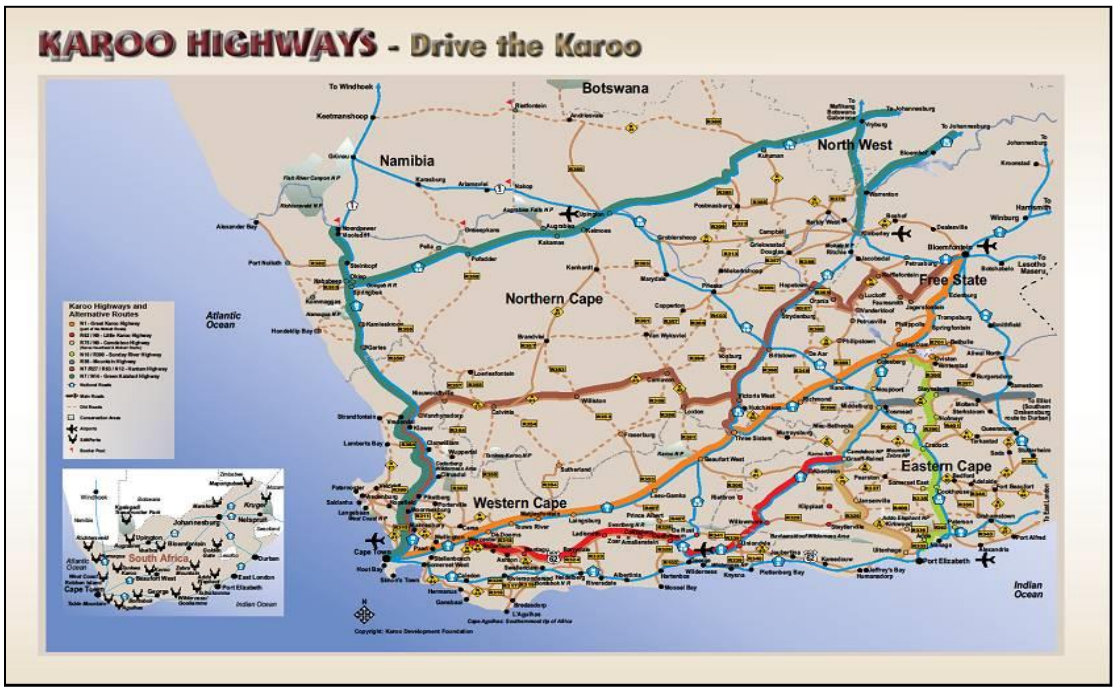
- Infrastructure in the towns is generally good, and represents a great deal of sunk capital in housing, water, sanitation, roads and other infrastructure
- The game industry is becoming an important foreign exchange earner in the area

- Agricultural expertise is high, with skilled and experienced commercial farmers, who are often eager to become involved in land reform, agricultural support and other initiatives
- Social services are generally good, and include clinics, schools, banks, post offices and retail facilities
- Some of the towns have developed significant tourism potential, with niche attractions and activities
- There is a growing phenomenon of “reverse migration”, whereby middle class city dwellers are moving to the rural areas, and this brings in new sources of capital, expertise and developmental initiative.

Tourism in the Karoo is viable and vibrant, and is based on several different types of attraction, which are discussed more fully in Chapter 6.

The Karoo has already built its tourism product around 7 major highways, which traverse this arid region, between the cities of Cape Town, Bloemfontein and Port Elizabeth:

Figure 2: Karoo Highways



Significantly, the Central Karoo District Municipality has been chosen as one of Government’s rural nodes, which offers a useful springboard for regional development.

3. Government Tourism Strategies

In this section, the relevance of a regional Karoo strategy to various Government policies is highlighted.

3.1 THE PRESIDENTIAL OUTCOMES

The Presidential "outcomes approach" is an important strategic approach to governance and development in South Africa, for several reasons:

1. It focuses on results
2. It links inputs, activities, outputs, and impacts
3. It makes explicit the chain of reasoning linking ideas, strategies, implementation and outcomes
4. We can see what works and what does not (monitor impacts)
5. We can conduct evaluations and feed these insights back into the policy loop
6. It provides a clear basis for discussion and negotiation about what should be done, and how
7. It promotes co-ordination and alignment (Presidency 2010: 10).

In this Karoo Tourism Strategy, several Presidential outcomes offer important goals. Each of these goals can be interpreted in the context of the Karoo tourism sector:

Outcome 4: Decent employment through inclusive economic growth

The regional Karoo Tourism Strategy will:

- Promote job creation through accommodation establishments, tourism services, and tourism attractions, including tour guides, information centres, and restaurants
- Assist micro-enterprises to become involved in the tourism value chain
- Assist Small and Medium Enterprises to grow, as they are recognised as the most effective job-creation sector in the economy.

Outcome 5: A skilled and capable workforce to support an inclusive growth path

The regional Karoo Tourism Strategy will:

- Encourage formal skills training and certification in tourism activities, such as eco-tourism and tour guiding
- Informal and on-the-job skills training, possibly linked to formal skills training
- Graduate and post-graduate education in tourism management, heritage management, business management, and environmental management
- Post-graduate research and feedback of research findings to local "knowledge hubs" in the Karoo.

Outcome 6: An efficient and competitive infrastructure network

The regional Karoo Tourism Strategy will:

1. Improve provincial road links between Karoo towns
2. Promote effective signage on national and provincial roads
3. Improve municipal road infrastructure and urban streets
4. Develop operations and management plans for municipal water and sewerage infrastructure, which is vital in attracting tourists to Karoo urban environments
5. Resuscitate rail connections between towns, and between the Karoo and the main cities
6. Revitalise railway stations as key transport hubs for rail, taxis and private vehicles
7. Establish a commercial airport, with scheduled flights, at Beaufort West, to serve the rest of the Karoo
8. Establish other Karoo airports as spokes, interacting with Beaufort West as a hub.

Outcome 7: Vibrant rural communities

The regional Karoo Tourism Strategy will:

1. Promote Karoo towns as key productive and service delivery nodes, serving their hinterlands
2. Promote agriculture through tourism, such as novel crops, farmstays and game farms
3. Densify rural land use, through making available land parcels for alternative rural livelihoods, and promoting local economic multipliers from attracting urban income streams to the Karoo
4. Promote the production and marketing of Karoo Lamb, as an iconic Karoo brand, in tourist enterprises
5. Assist emergent farmers, particularly on municipal commonage and land redistribution projects, to find new markets for their produce in the tourism sector, including guest houses, hotels, take-away outlets, and exports of products from the Karoo.

Outcome 8: Sustainable human settlements

The regional Karoo Tourism Strategy will:

1. Integrate low-income areas in Karoo towns into tourism precincts, by means of shared architectural heritage and craft production and sales
2. Protect the Karoo urban heritage, in towns and townships, as a tourist attraction, accompanied by appropriate tourism services and livelihood opportunities
3. Promote effective spatial planning of Karoo towns and regions, particularly regarding competing land uses, to protect tourism assets
4. Promote effective maintenance of urban services, for residents and tourists, including water, electricity, sewerage, storm water drainage, streets, pavements, CBD infrastructure, signage, parks and recreation areas.

Outcome 9: An efficient, effective, accountable and responsive local government system

The regional Karoo Tourism Strategy will:

1. Promote the interaction between municipalities and the tourism sector, including the ward system, Local Municipal level, and District Municipalities
2. Promote the system of District Tourism Organisations, Local Tourism Organisations, and Community Tourism Organisations (DTOs, LTOs and CTOs), working in partnerships with different levels of government

3. Promote intergovernmental relations, between national, provincial and municipal tourism authorities.

Outcome 10: Protection of the natural environment

The regional Karoo Tourism Strategy will:

1. Create a tourism asset register of game farms, game production and eco-tourism facilities in the Karoo
2. Develop significant biosphere or geographic areas, such as geoparks, biosphere reserves, or escarpments
3. Promote environmental conservation within game farms, in partnership with environmental experts
4. Promote environmental conservation on livestock farms
5. Promote environmental management in and around towns, particularly regarding solid waste disposal and sewerage management
6. Promote environmental management on municipal commonages for sustainable agriculture and to maintain peri-urban landscapes.

3.2 THE NEW GROWTH PATH

The growth path proposes strategies:

- To deepen the domestic and regional market by growing employment, increasing incomes and undertaking other measures to improve equity and income distribution.

- To widen the market for South African goods and services through a stronger focus on exports to the region and other rapidly growing economies.

- The launching of a major new tourism region, with significant markets in South Africa and abroad, will increase employment locally.

Tourism has been identified as one of the six major focus areas of the New Growth Path.

Several of the key initiatives identified in the New Growth Path can be promoted by means of Karoo tourism:

1. *Substantial public investment in infrastructure both to create employment directly,* in *construction, operation and maintenance:* Improving road infrastructure and municipal facilities will be a major job creation approach in the Karoo.

2. *Targeting more labour-absorbing activities across the main economic sectors – the agricultural and mining value chains, manufacturing and services:* Tourism is well known as a major job-creation sector, with relatively low barriers to entry, and with labour-intensive economic activities.

3. *Promoting the Green Economy:* Karoo Tourism is compatible with new energy industries, such as solar, wind and biogas, which can be used to power the Karoo towns. These have to be planned carefully, to prevent intruding on tourism areas, “viewscapes” and birdlife.

4. *Fostering rural development and regional integration:* Identifying a major new tourism

region will enable the development of the Karoo at scale, within a common brand and institutional system. This will remove duplication between the Karoo provinces and districts; and will enable the most effective use of resources and marketing.

5. *Supporting Small and Medium Enterprises:* The tourism sector is typically populated by SMEs. The New Growth Path envisages the integration of SME support systematically into all sector strategies. This is critical to ensure a space for smaller enterprises in the value chains of major industries and to support the development of clusters and sectoral regulations and market institutions that meet the needs of smaller producers. This could be promoted in various sectors, such as meat production, specialist cuisine products, crafts, and accommodation services.

6. *Promote heritage as an economic sector,* including festivals, special-theme conferences, art and craft, and performing arts.

7. *Promoting investment and bringing new capital into the region:* Urban investors should be made aware of tourism attractions and the economic potential of the sector, in order to encourage investment.

8. *Promoting the role of municipalities and provincial governments:* Karoo Tourism will require the active support and participation of tourism agencies at provincial, district, local and community level, and in particular, the system of District Tourism Organisations, Local Tourism Organisations and Community Tourism Organisations, affiliated to municipal governments.

3.3 NATIONAL PLANNING COMMISSION

The National Development Plan (2011: 131) 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 tourism promotion in the Karoo:

1. Increasing the number of tourists visiting South Africa: The Karoo offers an iconic desert tourism destination, comparable to major desert destinations elsewhere in the world, which can assist in attracting foreign tourists to South Africa.

2. Increasing the tourism spend in South Africa: Marketing the Karoo as a destination will attract tourism spend to this rural area. To achieve this, a commercial airport, with scheduled flights and car rental facilities, is critical, and this strategy proposes such a facility for Beaufort West.

3. Promoting tourism infrastructure, particularly accommodation, attractions and transport.

4. Promote and assist the development of entrepreneurship at all levels, including medium-, small- and micro-enterprises.

3.4 INDUSTRIAL POLICY ACTION PLAN (IPAP2)

The IPAP2 indicates that tourism is one of the areas expected to contribute to the development of, among others, rural areas, culture and crafts by growing the economy and creating jobs. The document also highlights the huge potential of increased local consumption due to domestic tourism.

The development of niche tourism is particularly important.

3.5 NATIONAL TOURISM SECTOR STRATEGY (NTSS)

The NTSS poses several challenges for tourism development, which are directly relevant to Karoo tourism:

1. Increase the geographic spread of tourism, particularly to provinces (such as the Northern Cape) which receive relatively few tourists (NDT 2011: 22).

2. Increase rural tourism: The Karoo is an intrinsically rural destination, characterised by small towns, commercial farms, game farms, and game parks.

3. Showcase South Africa as a distinct and globally recognised tourism destination: The inclusion of desert tourism in South Africa's portfolio will diversify its tourism offerings and attract a specific niche segment of tourists.

4. Promote tourism in the upper income groups in South African society - Promote the appeal of taking South African holidays (rather than outbound holidays): The Karoo is, for many affluent tourists, an unexplored destination.

5. Promote tourism in the middle income groups - Promote the holidays at budget destinations: The Karoo is an ideal budget destination, easily accessible to several cities.

6. Promote BBBEE in tourism: Township tourism in the Karoo is accessible to tourists, due to the close proximity of black townships to the central business districts of Karoo towns. Township taverns, cuisine, heritage, art, walking routes, and architecture are all potential tourism attractions.

7. Decrease seasonality: The Karoo offers a year-round destination. In school holidays, Karoo farms offer holiday experiences; during peak seasons, the Karoo offers transit accommodation to seaside cities; and during winter, the Karoo is an ideal hunting area.

8. An effort should therefore be made to develop new markets, instead of purely focusing on existing ones. This will include enhanced marketing of tourism products in rural areas. "Identify all potential new markets (or undeveloped markets) through research, including organised niche leisure markets, new geographical markets and new income/lifestyle markets that may be attracted to South Africa based on the existing or potential product offering" (2011:34). The Karoo offers a novel and attractive rural tourism region, which comprises about 40% of South Africa's land surface.

9. "Identify at least one event in each province as a flagship event that represents the provincial experience, and grow the importance of this event" (2011: 39): In the case of a trans-provincial region such as the Karoo, a flagship event will be required for the Karoo itself. This can be hosted every year in a different Karoo province.

Internally, our tourism industry remains fragmented, and often inter-company, inter-provincial and inter-city competitive behaviour is destructive (SAT 2010b: 47). We need to identify actual and potential synergies in the Karoo. The NTSS emphasises the need for inter-jurisdictional collaboration: "There is no coordination from a national level to ensure

alignment between the marketing promises made at national level, and actual product development. Often, neighbouring municipalities or provinces plan to develop very similar experiences within their areas, but lose sight of the fact that their product offering can be improved through coordination with others. Tourism does not follow political boundaries" (2011: 42). Regions such as the Karoo offer valuable opportunities for cross-border collaboration, based on specific niche and theme tourism options.

The NTSS identified several other key factors:

1. Spatial planning needs special attention: "Review spatial development initiatives (SDIs), priority areas for tourism infrastructure investment (PATIIs) and provincial plans, and develop a revised national tourism master plan as guideline for provinces, municipalities and the private sector to develop products and experiences that would improve and expand the current offering, utilise new high-potential tourism areas, and meet domestic and foreign market needs. Include accommodation, tourism activities and attractions that could combine to create satisfying tourist experiences. Develop, in consultation with stakeholders, a marketing framework aimed at niche markets" (2011: 43).

2. "Climate change and global warming are high on the world agenda, and the tourism industry is under threat due to high carbon emissions from travel, and people's propensity to avoid travel because of it. Therefore, South Africa's tourism industry must be seen to be minimising environmental damage to counteract the possible, negative perceptions of environmentally conscious travelers" (2011: 45). Given the opportunities for green energy in the Karoo (solar, wind and biogas), the Karoo can become a "green destination" of choice. This would fit well with its attractions such as Karoo game lodges and Karoo lamb, with offer pristine environments.

3. Empowerment and transformation: By means of interprovincial collaboration, the Karoo can fast-track black people's entry into the tourism sector. "Promote diversity in tour operators" packages/excursions": Several Karoo towns already have black tour guides, and this can be extended to more Karoo towns. Provincial departments of tourism can co-operate in promoting mentorship programmes throughout the Karoo, based on initiatives such as the Graaff-Reinet petrol-attendant training scheme.

5. Safety and security: "Develop and implement a major campaign to improve foreign source markets' perceptions of South African safety and security through concerted public relations management and information provision" (2011: 61). The Karoo, with its low crime levels, has a clear advantage in this regard.

6. "Contribute to the action plan for the development and expansion of domestic airlift in South Africa. The strategy should include issues of routes, frequencies, pricing, airports, volume levels, marketing, and government support" (2011: 65). An air transport strategy is critical for the Karoo. Combined with car rental options at Karoo airports, it will open up the Karoo to much greater levels of tourism. Beaufort West, which is centrally located in the Karoo, is an obvious choice for an airport with scheduled flights.

7. The way forward: District and Regional organizations (2011: 81): A Regional Tourism Organisation (RTO) should be created for the Karoo as a whole. It can be funded jointly by the private sector, Local and District Municipalities.

3.6 DRAFT RURAL TOURISM STRATEGY

The draft strategy (2011) refers to many rural tourism opportunities: Culture and heritage tourism, unspoilt natural and rural tranquility, indigenous knowledge systems, Agri-tourism, Sport tourism, Adventure tourism, Eco-tourism, Township tourism, Business tourism, Leisure tourism, Volunteer tourism, and regional product development linkages.

The Draft Strategy is based on the concept of development nodes, which is a cornerstone of Government's rural development strategy in general. In this context, the selection of the Central Karoo District Municipality as a rural node will offer a key government focus for tourism development. However, the Karoo is greater than the Central Karoo District Municipality, and strong links need to be built between the Beaufort West area and the Karoo regions in the other provinces (Eastern Cape, Northern Cape and southern Free State).

3.7 SA TOURISM

The South African Tourism Organization (SA Tourism), as the national institution responsible for tourism growth and development, crafted its growth and development strategy based on the following guiding principles:

- **Focus:** South Africa has limited human and financial resources and therefore must make informed choices which make smart trade-offs which have a long term strategic impact on South African tourism. This implies making choices based on return on investment and business objectives. This means that the Karoo must argue its case as a tourism investment area.

- **Data Driven and Customer Focus:** The strategic decisions of the Tourism Growth Strategy (TGS) are based on sound data and analysis which provide a sound and realistic basis for understanding consumers and markets that are attractive for South Africa in terms the country's objectives and the immediate focus is on people who are interested in travelling to South Africa. This means that Karoo stakeholders need to focus on data-gathering, monitoring and evaluation, as a core part of their activities.

- **Consultation to build sector 'co-operation':** The TGS is consultative, incorporating input from as many stakeholders as possible. This is an argument for cross-border collaboration in the Karoo, as well as collaboration across institutions (municipal, private and community) and across sectors (e.g. tourism and agriculture).

- **Goals are GDP, Jobs and Transformation**: Choices are made in relation to the mandate and national tourism goals in the Tourism Act: to promote GDP growth and job creation and the transformation of the economy through six key objectives (growing volume, spend, length of stay and provincial distribution while reducing seasonality and promoting transformation). This means that tourists should be encouraged to visit the Karoo, stay longer, and spend more on Karoo-based products and services. We need to be pro-active in bringing new product suppliers on board, such as crafts, heritage, restaurants, and donkey-cart rides, particularly where barriers to entry are low (in terms of skills and capital).

- **Transparency:** The choice-making processes and source of data should be

transparent to build consensus on developing the tourism industry within context of the nation's broader goals while informing business-level decision making in a broader context. There are important tasks for Karoo municipalities and tourism organisations to perform, to collect information, promote dialogue, and derive strategies in a collaborative and transparent manner.

In its 2011-2013 Marketing Strategy, SA Tourism identified five key development "levers (SAT 2010b: 8), which have important implications for the Karoo:

- Retain tourism uses by existing consumers, e.g. by improving standards and quality
- Stimulate current uses by existing consumers, by means of longer stays
- Stimulate current consumers to visit, for new activities and experiences, which suggests that new and exciting products should be developed to keep existing consumers interested
- Attract "new-to-you" consumers, i.e. convert consumers from the existing competitors to South Africa
- Attract "new to category" consumers, i.e. convert non-travellers into travellers (e.g. by good pricing strategies, or improved marketing or transport), or short-haul to long-haul consumers.

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.

4. Karoo Provincial Strategies

During 2010, all four Karoo provinces are revising their Provincial Growth and Development Strategies, and therefore it is important for the Karoo Tourism Strategy to be made available to decision-makers in these provincial governments.

What do the four Karoo provinces say about tourism in the Karoo? This section provides an overview of existing strategic documents, with regards to statements which may be of relevance to the Karoo.

4.1 WESTERN CAPE

The Western Cape's *Five-year Strategy, 2010-2015,* notes that tourism needs to be promoted in two ways: First, by more visitors coming to the destination and, second, as a result of the visitors spending more (by staying longer, and possibly travelling further away from the entry point into the Province). This perspective has clear relevance for the Karoo. "We also need to assist with the development of new sites, attractions, facilities, routes and infrastructure in the destination" (2010: 98). The Gateways Redistributive Marketing Initiative is at the heart of initiatives to attract visitors to destinations beyond Cape Town, Stellenbosch, Paarl and Franschoek.

Like other provinces, the Western Cape promotes a distinctive provincial brand (2010: 99): "We have a unified destination brand and consolidated marketing efforts in order to capitalise on all regional as well as sectoral messaging and marketing efforts". The difficulty with this approach, for a cross-border region such as the Karoo, is that each province tries to emphasise similarities between the Karoo and its other areas (e.g. seaside cities), instead of identifying unique Karoo destinations (which may have more in common with other Karoo regions than with seaside areas). In this process, the distinctiveness of the Karoo brand is lost.

The Western Cape's Strategy does open the way for interprovincial partnerships. "Inter-provincial cooperation is crucial to enhance the value of the tourism proposition of Cape Town and the Western Cape. For example, co-operation between Western Cape, Northern Cape and Namibia has seen the development of the Cape Namibia Route which will serve as a catalyst for the further development of the tourism economy in the Province, especially along the West Coast. Similar initiatives will be undertaken." Increased effort will be taken to promote greater intra-provincial co-operation between local and regional tourism co-operation between local and regional tourism organisations, industry members and communities (2010: 110). This is a major step forward in the quest towards a united Karoo tourism approach.

The Western Cape Tourism Development Framework is the sector strategy for the tourism industry that forms part of the Western Cape Micro Economic Development Strategy (2010: 100). It has defined targets and outcomes that need to be achieved over a ten-year timeframe. It is a living and dynamic document, with research constantly being added to the evidence base and analysis as the situation changes.

The Western Cape Tourism Partnership is a multi-stakeholder initiative, including government, civil society and business. Its three focus areas are: Tourism Growth, Tourism Enterprise Development, and Human Resource Development (2010: 100).

The Western Cape's strategy mentions that emphasis must be shifted from competition to "co-opetition" in order to maintain "a healthy competition while still acknowledging the

complementary nature of surrounding product innovative product packaging and route development" (2010: 101). The need to take proactive steps to foster "co-opetition" at municipal level is a key strategic driver as alignment is needed to market "whole packages" across the Province and as part of a single menu. This focus on collaboration is a welcome one, although it is a pity that the Western Cape's strategy is geared solely on intra-province collaboration.

The Western Cape Department of Economic Affairs and Tourism has launched several key tourism routes. Route 2 is Cape Town to the Cape Winelands and the Central Karoo (2012: 86).

The WC Tourism Development Plan focuses on several key initiatives (2010: 102), which are potentially of relevance to the Karoo:

1. Improving sites, attractions and facilities to enhance the visitor experience.
2. Developing key routes which must be jointly marketed at provincial level and local level.
3. Developing wealth unlocking tourism-related infrastructure as a response to mega projects.
4. Researching international product offerings to ensure that provincial product offerings remain at the cutting edge and match constantly expanding demand.
5. Auditing and further researching existing sub-sectors and niches, such as: green tourism, responsible tourism, events tourism (including sport tourism), cultural/heritage tourism, creative tourism, agri-tourism, and the youth travel market
6. Ensuring that products and experiences based on culture, heritage and the natural environment are designed and established to match the demand for new and refined products in these areas.
7. Maximising co-operative marketing opportunities with other sectors like: craft, film, cultural, creative, food, wine, jewellery, cabinet-making, fashion and design.
8. Integrating Cape-made agricultural and manufactured products into all relevant aspects of the tourism product.
9. Ensuring appropriate tourism road signage for sites, attractions, routes, icons and gateways.

The Western Cape Tourism Strategy places a strong focus on the craft industry. "The craft sector is labour-intensive and is mostly made up of micro and small enterprises that offers strong opportunities for enterprise development. It provides significant opportunities to women and new entrants to the formal economy" (2010: 113). (Significantly, the Arts and Culture sector is included in the Western Cape Department of Economic Affairs and Tourism, thereby promoting the marketing of crafts through tourism outlets). The Cape Craft and Design Institute is a Section 21 non-profit organisation. It was established in 2001 as a joint initiative of the Provincial Government of the Western Cape and the Cape Peninsula University of Technology. The CCDI provides skills and enterprise training to crafters and assists with market access. In the 2008/2009 financial year, it provided 511 market access opportunities for businesses and generated R2, 4 million in direct sales (2010: 113).

In the development of human resources in the tourism sector, the Western Cape has an innovative programme. The Tourism Job Shadowing, in partnership with the Western Cape Education Department and the private sector, aims to provide students studying tourism or hospitality subjects at secondary school level with an opportunity to gain workplace exposure. The learner is encouraged to pursue tourism as "a career of choice" (2010: 105). In addition, the Programme provides bursaries to second and third year full-time students studying Events' Management, Tourism Management and Hospitality Management with accredited HEIs and FETs in the Western Cape. The return on investment is that students have to work back each year that the bursary was provided for, either to the Department or

an appropriately approved workplace (2010: 106).

Tourism Awareness is an innovative programme in the Western Cape (2010: 107). It is open to all residents of the province. The awareness sessions are designed to create interest amongst the communities about tourism and how the communities can benefit from the industry. Tourism Awareness also focuses on ensuring that the informal sector becomes formal and more structured, such as homestays upgrading to B&B's and Guesthouses and taxi drivers who want to become registered tourist guides and tour operators. Municipalities, Community Development Workers, Local Tourism Organisations and the Tourism Helpdesk Agents work together to ensure that the communities are reached. The programme operates at several levels:

- Enterprise Development 101: To assist entrepreneurs with basic knowledge that will ensure that the tourism product that the entrepreneur has conceptualise is in line with tourism demand.
- Tourism Enterprise Development 201 is a six-month business skills programme aimed at equipping entrepreneurs to manage and grow their businesses.
- Tourism Enterprise Development 301 is aimed at those who want to invest in a new product, grow/expand their business and/or wish to take on a business partner. TEP is a key partner in providing financial and nonfinancial support.
- The Tourism Mentorship Programme is based on a linkage between selected participants on the Tourism Enterprise Development 301 and mentors from the leading tourism private sector bodies in the Province.

Tourism Helpdesk Agents (THDs) provide tourism entrepreneurs with business support.

THDs play a vital role as tourism business advisors and training facilitators (2010: 108). The Department also facilitates Tourism BBBEE Workshops which provide guidance on implementation of the Tourism Sector Code and step-by-step assistance with the verification process. It also facilitates Tourism Business Networking Sessions between established businesses and emerging businesses to increase business scope and joint ventures, in partnership with TEP, the national Department of Tourism, provincial tourism associations, municipalities and all relevant tourism stakeholders.

To promote pro-poor tourism, the Department aligns its interventions to that of the national Tourism Department. It facilitates access to tourism channels for the informal sector and access to information; access to funding, markets, training and business linkages; and promotes capacity building for the informal sector so as to fully benefit from tourism' enterprise development and economic empowerment initiatives (2010: 108).

4.2 EASTERN CAPE

The Eastern Cape Tourism Master Plan (2009-2014) places strong emphasis on the close links between ecology and tourism. "Recent developments have highlighted a symbiotic relationship between nature tourism, environmental conservation and sustainable development" (2009:19). This is a much more distinctive focus on biodiversity than is found in the Western Cape's Tourism Strategy, possibly because the Eastern Cape has linked tourism and environmental management within the same Department. Furthermore, the Eastern Cape Parks Board and the Eastern Cape Tourism Board have now been merged, to form the Eastern Cape Parks and Tourism Agency.

The Master Plan makes provision for the Great Karoo Gateway Biosphere, located in the

Chris Hani District (2009: 18). The Ukhahlamba District Municipality made provision for the amalgamation and expansion of parks around Gariep Dam (2009:19).

The Plan mentions several key features of the Karoo, such as the Victorian architecture of the Karoo villages (2009: 26)

However, the Karoo was significantly neglected in several ways. The Eastern Cape Tourism Board did not have an office in the Karoo (2009: 27). The Master Plan does not mention any Karoo attractions as key iconic features (thus neglecting the Valley of Desolation in Graaff-Reinet and Compassberg – the highest mountain in the Eastern Cape – in the Sneeuberg). Nor does it mention the Graaff-Reinet airport (with a tarred runway).

The Eastern Cape's tourism sector suffers from several difficulties: Fairly infrequent flights to the main cities; the lack of a provincial signage policy; the lack of provincial tourism offices located outside the province; and very limited docking by international passenger ships. In 2004 the Eastern Cape received only 7.7% of foreign visitors entering South Africa; this number was further reduced to 6.6% in 2008. This is less than Gauteng, the Western Cape, KZN, the North West, Mpumalanga and the Free State. In fact, the only provinces that receive fewer foreign visitors than the Eastern Cape are the Limpopo province and the Northern Cape. This is particularly significant as the Eastern Cape has extensive nature based activities, beaches, and cultural and historical heritage, which are the top three activities foreign tourists engage in when visiting South Africa (2009: 21).

The Master Plan stipulated several strategic objectives (2009: 34):

Ensure that infrastructure in the Eastern Cape supports a high quality tourist experience in the entire tourism value chain

1. Market and promote the Eastern Cape in such a way that tourists see it as a destination that offers unique and high quality products
2. Ensure that previously disadvantaged people actively participate in the tourism sector
3. Create an environment that promotes the development and enhancement of skills in the tourism sector
4. Ensure that the Eastern Cape tourism sector supports a safe and secure environment
5. Ensure that tourism planning and decision making is informed by accurate, consistent and up-to-date research information that is aligned to national data standards
6. Ensure the availability of comprehensive, quality, user-friendly, accessible and objective tourist information at all the key points in the province
7. Ensure the establishment of a sound institutional framework within the Province to support the efficient and effective management and coordination of the tourism sector.

There are four key areas for tourism product development in the Eastern Cape, each with some relevance to the Karoo:

1. The enhancement of tourism products in high priority areas: Lake Gariep is mentioned (2009: 40);
2. The development of tourism products in those areas that are not currently high priority areas, particularly the hinterlands of the cities, and leisure/business/events
3. The development of new iconic attractions for the Eastern Cape, and
4. The diversification of tourism products (2009: 39).

In particular, the importance of agricultural tourism is emphasised (2009: 40): "These products need to be packaged and promoted in such a way that they increase both the agricultural and tourism potential of the province through increasing employment opportunities … . Agro-tourism can be used as a tool to promote equitable distribution of tourism benefits as well as rural development."

Like the Western Cape's Five-Year strategy, the Eastern Cape Master Plan maintains that " the province [should] project a common, desired picture and a unified visual message and that consistency in messaging is maintained" (2009: 44). Like the Western Cape, this becomes difficult, as the Eastern Cape is also characterized by several distinct areas (including seven biomes). It becomes very difficult to devise a common message. The Eastern Cape has adopted the image of "adventure province", but this does not capture the ecological distinctiveness of any of the seven biomes. (It is also possible that adventure tourism is also a major attraction of other provinces, and therefore is not very distinctive for the Eastern Cape). Once again, the lack of focus on the Karoo as a distinctive bio-region makes marketing and branding difficult for the Eastern Cape.

As regards human resource development in tourism, the Eastern Cape Master Plan notes that there are two primary human resource issues in tourism. The first regards persons working within the tourism sector; the second refers to government planners. HRD can therefore take place on numerous levels that need to be addressed. At the time of writing (2009), a lack of a coordinated approach to training, and the fact that tourism skills development occurred without the direction of a strategic plan, meant that skills development happened in a haphazard manner. Co-operation between relevant institutions and stakeholders is critical to developing the tourism skills base in the area. On-site, work-based learning is a best practice method of passing on skills. The integration of the private sector into skills development in the province is essential (2009: 45).

Furthermore, general tourism awareness is critical among the residents of tourism products in the province, and the development of non-specific tourism skills are also critical for those persons working in the tourism industry. Awareness of the industry will result in appreciation, which will ultimately ensure better service to tourists, the decrease in crimes against tourists, and more learners and entrepreneurs wishing to enter the tourism sector (2009: 45).

Unlike the Western Cape, the Eastern Cape had not yet (in 2009) developed specific programmes to address human resource development. The Province's approach to HRD remained fragmented.

As regards transformation of the tourism industry, the Tourism Master Plan notes that the tourism sector remains, in the Eastern Cape as in the rest of the country, largely inaccessible to black entrepreneurs. One of the key mechanisms to overcoming this is entrepreneurial development. Currently (at the time of writing, in 2009), however, there are few interventions in place to encourage the growth of either new market entrants or SMMEs (2009: 54). The Eastern Cape Tourism Act (2003) had established the Tourism Development Fund, to promote the "development or empowerment of the previously disadvantaged persons or communities in the tourism industry. It is not clear whether this Fund had already been implemented. A collaborative approach, involving public and private stakeholders, would be required to promote effective transformation. A tourist SMME support programme is required.

The Master Plan also commented on the inadequate level of tourism infrastructure in the Eastern Cape (2009: 49), particularly due to the poor state of rural roads and the ineffective utilization of airports. The signage system was unstandardized and ineffective as a marketing tool.

4.3 NORTHERN CAPE

The Northern Department of Economic Affairs and tourism has produced a White Paper on

Development and Tourism. Tourism is seen as a significant economic growth opportunity, because tourism creates jobs, it can provide immediate employment, it involves all skills levels, it creates many business opportunities (accommodation, tour guiding, transport, marketing and crafts). Tourism brings development to rural areas, but does not damage the environment or local heritage. It also facilitates cross-cultural interaction, keeps money in the local economy, and has a strong multiplier effect.

The White Paper regards the natural environment as its strongest asset. Five out of seven biomes in South Africa are located in the Northern Cape. There are numerous provincial, national and private parks, game reserves and conservancies, offering abundant wildlife and floral diversity. This includes two trans-frontier conservation areas (Kgalagadi and Ai-Ais/Richtersveld). In addition, there are many cultural and heritage resources, including museums, historical sites, and monuments. The MacGregor Museum in Kimberley works throughout the province to promote cultural conservation. There are archaeological and rock art sites, arts and cultural festivals, prominent historical figures (such as Cecil John Rhodes, Olive Schreiner, Sol Plaatje, and Robert and Mary Moffat). There are also unique and endangered cultures, such as the San communities, the Griquas, and the Namas.

The tourism priorities, as identified in the Northern Cape's Growth and Development Strategy, are to build a strong provincial brand, promote tourism product development, promote spatial clustering, and to address the racial imbalances in the sector (2004: 44). The Northern Cape is also participating in a tourism mentorship programme, facilitated by the Tourism Enterprise Programme (TEP).

The Northern Cape Government believes that the tourism industry exhibits significant growth potential (Northern Cape 2004: 22). In particular, this refers to eco-tourism and "extreme" experiences. The Northern Cape brand is now "Northern Cape Real", which aims to capture this sense of ecological hyper-reality.

However, there are constraints on tourism in the Northern Cape. Air transport is limited to Kimberley (which links to Cape Town and Johannesburg only), and Upington (which only has links to Johannesburg). Flight tickets are prohibitively expensive. Air access to many other attractions (such as Namaqualand) are non-existent. "With upscale tourists becoming increasingly money-rich and time-poor, such lack of fast and efficient air transport to the province and between its major attractions is probably the single biggest obstacle facing tourism growth in the province". There is a need for air charter facilities to towns such as Springbok, Calvinia, Carnarvon, Sutherland, Colesberg and De Aar – and can even link with principal towns in other provinces.

4.4 FREE STATE

Tourism (and allied SMME promotion) is another sector the province focuses on. It is active in the training of guides and their assessors, and in developing tourism. The stimulation of SMMEs is part of an integrated strategy to take the Free State economy onto a higher road - one in which the economy is diversified, and manufacturing and service orientated (FS Development Plan 119)

At present the Free State's main tourism product is its natural scenery, and followed by a range of historical and cultural tourism products. Another tourism advantage of the Free State relates to the province's central location in South Africa. The province is well integrated with the rest of South Africa through its road and rail networks and serves as a popular tourist stopover destination.

Tourism development in the short to medium term will have to be concentrated on the eastern part of the province (weekend visitors) and the Parys area (day-visitors) where there are currently a number of established tourist attractions and an infrastructure that can cope with a reasonable number of tourists. This approach provides little official support for the Karoo, with the exception of a focus on natural scenery, which could be relevant to the Karoo.

One interesting possibility could be a trail that connects Qwaqwa with Vanderkloof Dam. It could be billed as the world's longest uninterrupted nature-based trail using multiple modes of transport. Such a route would include Gariep Dam and the Orange River.

4.5 CONCLUSION

Each provincial strategy has key features, approaches and strategies. There is a great deal that they can learn from each other. In brief, the strength of the Western Cape's approach likes in crafts and cultural tourism; the Eastern Cape in the natural environment and eco-tourism; t he Northern Cape has a strong focus on adventure and "extreme" experiences, particularly in desert environments; and the Free State emphasises the importance of the Orange River and Gariep Dam area.

However, they can all share these major features. The division into artificial provincial boundaries prevents meaningful synergies. Consequently, a region-wide focus is required.

5. Karoo Tourism Product Supply

This section focuses on tourism accommodation and attractions currently available in the Karoo. In each case, the number and diversity of offerings shows a very developed tourist market, with huge potential for more consistent and integrated marketing.

5.1 ACCOMMODATION ESTABLISHMENTS

Data on the number and type of Karoo tourism establishments is available from internet searchers, brochures, publicity associations and municipalities. *There is no coherent data-base of Karoo tourism service providers* - a gap which needs to be filled.

Impressionistic evidence suggests a huge number of accommodation establishments in the Karoo. For example, Beaufort West had over 40 establishments in 2010, with an additional 20 guest farms in the countryside. The number of beds has increased dramatically in the last ten years, from 720 in 2001 to 1500 in 2010. In Cradock in 2008, there were 20 guest houses and guest farms.

In a survey of 28 guest houses in the Karoo in 2010, it was remarkable how many beds were available:

Table 2: Guest houses and beds in a Karoo sample

Number of beds	Number of guest houses	%
6-10 beds	4	15
11-15 beds	5	19
16-20 beds	2	7
21-30 beds	6	22
31-50 beds	6	22
51-75 beds	3	11
151-200 beds	1	4

5.2 TOURISM ACTIVITIES AND ATTRACTIONS

The Karoo is already tourist attractions on the following themes:

- Geological and landscape
- Palaeontology
- Rock art
- Architecture, e.g. corbelled houses, brakdak, Victorian, railway stations
- Anglo-Boer war, concentration camps, military cemeteries, block houses
- Literary heritage
- San and Khwe struggle sites and indigenous rock art
- Nature tourism (e.g. tortoises, riverine rabbits, succulents and game)
- Agricultural heritage (merino, angora, dairy farming, cheese making)
- Astronomy and star gazing
- Cuisine and wine
- Game farming
- Missionary and church history
- Adventure tourism
- Succulent biological heritage and associated fauna
- Graveyard tourism
- The people of the karoo, including karretjiemense and shepherds.

The four S's of the Karoo are: Space (emptiness can be deeply fulfilling), Solitude, Serenity and Sunshine. The Karoo is not Disneyfied, and it remains authentic. The Karoo is also disease-free (no cholera or malaria). And it has glorious sunny weather!

In order to understand the Karoo tourism asset base, a survey was done by the University of the Free State, of attractions in all Karoo towns.

The following broad categories were identified:

Table 3: Categories of Karoo attractions

Grouping 1	Adventure & Leisure (land)
Grouping 2	Water sport
Grouping 3	Heritage & History
Grouping 4	Architecture
Grouping 5	Nature
Grouping 6	Literature
Groupings 7	Wine routes/Cuisine
Grouping 8	Art & Craft

In each area, these categories can be broken down into sub-categories. In the Karoo, for example, the following were identified:

Table 4: Detailed categories of Karoo attractions

AB	Architecture Edwardian	B	Birdwatching
ABV	Alcoholic Beverages – breweries, wine	B/C	Boating
AC	Architecture Cape Dutch	BO	Book shop
AD	Adventure	BRT	Bird tours
AE	Abseiling	BT	Bicycle, bike trails, motorbike
AG	Architecture Gothic	BTW	Booktown
AGE	Architecture Georgian	BW	Boer War
AGER	Architecture German	B/C	Canoeing
AI	Architecture Indigenous	C	Conservancy
AK	Architecture Karoo	CBW	Cemetery Boer War
ANG	Architecture Neo-gothic	CE	Cemetery English
AR	Architecture Russian	CEM	Cemetery
ARC	Architecture general	CH	Church
ART	Artist	CHE	Cheese
AV	Architecture Victorian	CJ	Cemetery Jewish
		CO	College
DR	Donkeycart rides	CRA	Craft
F	Fauna	G	Game viewing
FA	Farm	GC	Golf Course
FD	Food	GF	Guest Farm

FF/FW	Fauna & Flora, flower viewing	GT	Guided Tours
FI, FIT	Fishing, fishing tours		
FL	Flights – scenic, microlites	HB	Historic buildings
FO	Fossil	HE	Heritage site
FOR	Forest	HI	hiking trails
FT	Farm tours	HLR	Holiday Resort
		HR, HT	Horseriding, horse trails
L	Literary tours	HU	Hunting
LB	Bookshop		
LR	Library	MO	Monument
		MU	Museum
NR	Nature Reserve	ME	Memorial Garden
N	nature	MOU	Mountaineering
PA	Paragliding		
R, RA	Rock collection, rock art		
RR, RC	River rafting, river cruise		

About 1 000 attractions were identified. Once again, the range of tourist product is extraordinary, in terms of number of diversity.

5.3 A COMPARISON OF KAROO TOWNS

Karoo towns each have their own distinctive character and assets, providing an extraordinary tourism diversity.

The following table shows the key characteristics of each major Karoo town, based on Heritage, Shopping and Adventure categories:

Table 5: Attractions in Karoo towns

Municipality	**Town**	**Key tourism sector**	**Heritage**	**Shopping/ crafts**	**Adventure Eco-tourism**
Laingsburg	Laingsburg	Overnight Crafts Flood	Laingsburg Flood History	Crafts	Star Gazing Nature Reserves Floriskraal dam Fossils
Prince Albert	Prince Albert	Crafts Cuisine Mountain	Cape Dutch, Karoo & Victorian Architecture	Crafts Cuisine (chef school, olives)	Die Hel (Gamka`s Kloof) The Swartberg Pass & Nature Reserve Seweweekspoort Meiringspoort Gamkapoort dam
Beaufort West	Beaufort West	Overnight Airport	Chris Barnard Museum Blockhouses Rock Painting –	Coffee shops	Karoo National Park Game Hunting

			Nelspoort World's Biggest Painting		
Inxuba Yethemba	Cradock	Overnight Heritage	Cradock Spa Breë Street, Cradock Club Building Cradock Four Olive Schreiner Museum.	Victoria Manor Restaurant	Mountain Zebra National Park Egg Rock, Fish River Commando Drift Nature Reserve
	Middelburg	Overnight Eco-tourism			
Camdeboo	Graaff-Reinet	Overnight Heritage Eco-tourism	Museums (variety in Graaff-Reinet) Pierneef collection	Antiques Restaurants Crafts Chocolates	Camdeboo National Park (which includes the Valley of Desolation),
	Aberdeen	Heritage	Victorian architecture Wall hangings (NG Church)		
	New Bethesda	Heritage	Owl House Kitching Fossil Centre	Art and Craft shops Cuisine	
Rhenosterberg	Vanderkloof	Dam			Vanderkloof Dam and resort
Umsobomvu	Colesberg	Overnight Horses	Colesberg Kemper Museum	Coffee shops	Hunting Farms Doringkloof Nature Reserve
Emthanjeni	Hanover	Overnight		Craft shops	Karoo Conservancy (hippo)
Thembelihle	Hopetown	Overnight Orange River	Concentration Camp Anglo Boer War Toll House Old Bridge		Orange River
Kareeberg	Carnarvon	Overnight SKA	Star-gazing Rhyn's Mission Station Corbelled houses		
Karoo Hoogland	Sutherland	SALT	Star-gazing	Restaurants	
Ubuntu	Victoria West		Historical Buildings Apollo Theatre	Deli Craft Shops	Hunting Guest Farms Nature Reserve Bird Park
Ubuntu	Richmond		Booktown Festival Horse museum	Restaurants	
Kopanong	Gariep Dam	Overnight Dam resort		Restaurants	Game reserve Microlites
	Philippolis	Heritate	Architecture Adam Kok Laurens vd Post		Tiger sanctuaries

A much more detailed comparison of Karoo towns needs to be undertaken. This will require more research. It will be important, to enable the linking of towns in collaborative marketing systems (e.g. towns with strong cuisine offerings, or those with Khoisan Art).

5.4 TOURISM GROWTH PROSPECTS

In 2010, a survey of guest house owners was conducted in 12 Karoo towns.

In the survey of guest house owners, the interviewees were asked whether they thought that tourism would grow. The vast majority (93%) maintained that it will, while 7% were unsure. This suggests a great deal of business confidence and optimism.

The following positive reasons were provided:

- Uniqueness of the area
- Heritage and authenticity
- Climate, desert tourism, natural beauty
- Remoteness, peace and quiet, refuge, unspoilt
- Cheap to visit
- Rural tourism is becoming popular
- Physical safety
- Important large-scale projects in the Karoo, e.g. SALT and SKA
- Physical safety
- Reverse migration – people moving from the cities back to the small towns
- High levels of investment in certain sectors (e.g. accommodation and game farms)
- Eco-tourism
- Karoo hospitality
- Niche markets.

5.5 HOW CAN TOURISM IN THE KAROO BE IMPROVED?

A survey of 260 Karoo tourists were asked what infrastructure needed to be improved in the Karoo.

Remarkably, 21% of respondents gave an unprompted reply that the Karoo should be “kept the way it is”, which suggests that many people experience the Karoo as authentic and “un-Dysneyfied”. The Karoo as a remote backwater has its own attractions. In the table above, this perspective was captured as “preservation”.

However, other people do need improved infrastructure, such as better roads, signage, picnic spots, resorts, ATMs, medical services, restaurants and public transport. These are listed

Interestingly, several people are concerned about poverty and deprivation in the Karoo, and are concerned about the social environment (*“social upliftment”* in Table 6 below).

Only one person mentioned security as an aspect which needs to be improved. This suggests that the Karoo environment is typically experienced as being safe.

The survey was based on an unprompted (open-ended) question:

Table 6: How can tourism infrastructure in the Karoo be improved?

How can the tourism infrastructure in the Karoo be improved?	Number of responses	% (rounded off)	Type of need
Keep it as it is - no changes	30	21	Preservation
Promote farm stalls, local produce, craft sales	5	4	Products
Maintain heritage and old architecture, including indigenous heritage	8	6	Preservation
Improve or tar the roads	22	15	Infrastructure
Improve signage, provide more information at garages	10	7	Infrastructure
Provide or improve picnic spots	1	1	Infrastructure
Keep the dirt roads - don't tar them	4	3	Preservation
Improve marketing and brochures	17	12	Marketing
Don't over-commercialise	6	4	Preservation
Provide social programmes for the poor	3	2	Social upliftment
Promote ecotourism & sustainable environment	1	1	Nature
Upgrade resorts, provide caravan sites	3	2	Infrastructure
Promote farmstays	1	1	Marketing
Make the Karoo affordable	4	3	Cost
Improve public transport	1	1	Infrastructure
Improve cleanliness and maintenance	6	4	Preservation
Reduce government interference in tourism	3	2	Governance
Improve ATM and credit card facilities	2	1	Infrastructure
Provide emergency medical facilities	1	1	Infrastructure
Improve town planning and zoning	2	1	Preservation
Provide more recreational activities and youth facilities	5	4	Social upliftment
Improve schools	1	1	Social upliftment
Make the Karoo more hospitable	1	1	Marketing
Upgrade telecommunications	1	1	Infrastructure
Provide more restaurants	2	1	Infrastructure
Improve security	1	1	Safety
Reduce heavy truck traffic	2	1	Infrastructure
Total	144	100.0	

5.6 HOW DEVELOPED IS KAROO TOURISM?

South Africa in general, and the Karoo in particular, represents an “early stage” of tourism development (although parts of South Africa are already experiencing a “middle stage”) (SAT 2010b: 90). Such an early stage is characterised by several features – and these indicate steps which need to be taken by tourism planners in the Karoo:

1. The market is uninformed, price insensitive, multi-purpose. Tourists do not have specific or highly distinctive purposes for travel. Decisions to travel to a region are based on curiosity and a desire to explore an unknown destination, rather than on price.

2. The product is very individualized and status oriented. Tourism products are generally small-scale and based on the creativity or whims of the tourism owner, and therefore may be quite diverse. There are few specialised packages.

3. Competitors are few, and the location is a one-stop shop.

4. The tourism “channel” (marketing organisation) is unsophisticated, isolated, and experience based. There are few specialised information providers.

However, the Karoo, like South Africa, is not entirely at the initial stages of tourism development. In some ways, it is moving from the early to the middle stage of tourism development. This new phase is characterised by:

1. Rapid entry of new players, and often overcapitalization
2. The emergence of consolidating forces, such as tourism agencies and touring companies to control pricing and capacity
3. There is more competition than collaboration in the industry, and relationships are typically weak
4. There is still a lack of industry-specific or institutionalized information.

What is now needed, is consolidation of the tourist region, around a few core themes, and developing new tourism value chains around these themes (entrepreneurs providing services to tourist enterprises, and tourist enterprises providing services to other businesses).

6. Tourism demand

6.1 THE SOUTH AFRICAN TOURISM CONTEXT

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

6.1.1 DOMESTIC TOURISM

Domestic tourism offers a mixed picture of success and limitations. In 2007-8, domestic tourism declined (SAT 2009a: 2). There were more tourists (increase of about 20%), but the number of trips declined by 8.4%. However, the average spend per trip increased from R550 to R780. This suggests that the market is growing (more tourists), but the trips are probably longer in duration. This may benefit the Karoo market, which is a long way from the main cities, and is suitable for fewer but longer stays.

Budget tourism is an important aspect of the domestic market. The main disincentive for travel is cost (SAT 2008: 3). Hence a low-budget destination (such as the Karoo) has an advantage.

Travel by domestic tourists has been relatively stagnant, compared to arrivals by air, which increased by around 10% between 2005-7 (SAT 2009a: 12). It is therefore important to think creatively about new domestic destinations.

Visiting Friends and Relatives (VFR) is still the main reason for domestic trips – around 25-30% (SAT 2009a: 14). This is largely because many black South Africans have, until now, been excluded from the tourism market, due to factors such as cost, but also because of the legacy of apartheid. However, VFR is declining, and holidays have increased as a proportion of domestic trips, but from a low base, from around 3% in 2003 to 6% in 2007 to 16% in 2008 (SAT 2009a: 18). This suggests that we need to understand the growing domestic holiday market: “Holiday travel is the future”, according to SA Tourism.

In 2008, self-catering accommodation was the main form of *paid* domestic accommodation (around 4% of nights, comparable to hotels (also 4%)). Guest houses provided around 3% (SAT 2009b: 22). B&Bs received about 3% of visitor nights, and game parks and backpackers around 0.5%. VFR remains the main form of accommodation (around 80%).

The length of stay of people taking holidays is still very short (around 5 days). It is therefore important to encourage people to visit relatively low-cost destinations, so that they can stay for longer.

For Government, improved geographic spread of tourism is a key goal, as well as reducing the geographic polarization of holiday travel (SAT 2009a: 20). This means that relatively unexplored regions, such as the Karoo, should be promoted.

The main activities of domestic tourists are, in order of importance: Social attractions, shopping, beach, nightlife, and visiting casinos. These are not very relevant to the Karoo. However, the next priorities are of significance to the Karoo: Visiting natural attractions (5% of activities), wildlife (3%) and cultural sites (3%) (SAT 2009b: 24).

Visitors to the Northern Cape tended to have the longest stays – an average of 5.5 days

(SAT 2005: 14). This is presumably because of the long distances to reach the Northern Cape.

Domestic travel is very seasonal, based largely on the school holidays.

SA Tourism has identified important domestic tourism segments (SAT 2009a: 23). There are five main tourism segments of relevance to the Karoo:

(a) **Meetings, Incentives, Conferences and Events (MICE):** This usually refers to business tourism (e.g. conferences), but it can also include special events. The Karoo is already hosting events (e.g. food festivals and literary festivals). Business tourism is growing rapidly (about 118% between 2006 and 2007) (SAT 2009a: 15).

(b) **Independent Young Couples with Families**: These are typically less than 50 years old, with an average spend of R4-5 000 per holiday (2003 figures), who make an average of 1.5 trips per year, at an average length of stay of 10 nights. There are 700 000 such people in South Africa, which makes up 0.7% of the tourism market. This market is valued at R3.5 billion per annum.

(c) **Well-off Homely Couples:** These are typically over 30 years old, with an average spend of R2-3 000 per annum (2003 figures), who make an average of 1.1 trip per annum. The average length of stay is 7.5 nights. There are 800 000 such people in South Africa, which makes up 0.8% of the tourism market. The market is valued at R0.5 billion per annum.

(d) **Golden Active Couples:** These are over 50 years, whose children have left home. They typically spend around R4 000 per holiday (2003 figures), who make an average of 0.5 trips per year, at an average length of stay of 13 nights. There are about 200 000 such people in South Africa, and this market is valued at R1 billion.

(e) The **Young and Upcoming** segment consists of 18-35 year-olds, more than 5 million people, spending about R1400 per holiday, on trips of only 6 nights per average. They make several short trips per annum. The value of this segment is about R3 billion. This means that the Karoo market is smaller, older, more selective, more affluent, and spending relatively long time on trips. However, this may change, as the Karoo develops new niche markets (such as adventure tourism) which appeal to younger people.

6.1.2 FOREIGN TOURISM

The number of foreign arrivals in South Africa has shown steady growth, from 2.5 million in 1993 to 6 million in 2001, to 9.9 million in 2009 (SAT 2010a: 10). However, it is affected by economic and other global events, such as recession, terrorism and epidemics.

The UK, USA and Germany remain the top long-haul markets (SAT 2010a: 12, 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 (SAT 2010a: 13).

Research has shown that foreign tourists are exposed to fewer and less authentic experiences than they desire (SAT 2010b: 36). This is a major opportunity for South Africa

as a whole, and the Karoo in particular. "South Africa, being a long-haul market for all major tourism source markets, has to focus on people who are worldly, well travelled and are interested in other cultures" (SAT 2010b: 70).

There are two segments of the international tourism market, of relevance to the Karoo (SAT 2010b: 72):

- *The Wanderluster Segment:* They are typically younger singles or couples between 25-40 years, and generally do not have children. They are young urban professionals earning higher incomes, and they already have considerable travel experience. Their desired experience centres on nature, culture and adventure with a strong liking for "urban vibe". While also concerned with issues of safety and comfort, these consumers are driven more by the emotional appeal of a destination compared to the more practical NSSAs. They are generally more positive about South Africa in every market than any other segment but they also want to travel the world.

- *The "Next Stop South Africa" (NSSA) segment:* This segment represents our traditional market. They are wealthier experienced international travellers, usually between the ages of 40 and 60 whose children (if any) have left home. They typically look for natural beauty and authentic cultural experiences. They prefer independent or small group travel, and look for luxury and comfort as part of their experience. Safety is a key consideration when choosing a new destination. Safari is a big draw-card when travelling to Africa.

For the international market, the "improve geographic spread" objective has become more important, indicating that tourists are exploring more unknown regions in South Africa. Seasonality has also improved for long-haul markets, providing a more all-year-round revenue stream (SAT 2010b: 82).

6.2 PROFILE OF THE KAROO TOURIST

A survey of 183 tourists (foreign and South African travellers) was undertaken in 12 towns in the Karoo, during the period 10 May to 10 August 2010 – which included the FIFA month.[1]

More than half (53%) were in the age bracket 36-55, and an additional 19% were 56 years or older. Typically, these are people with school-going children (who may be at school when the trip takes place), or people whose children who have left home.

However, there was a fair smattering of people in the 26-35 age group (17%), and young people in the 18-25 age group (7%).

The education profile reflects a well-educated category of traveller. More than half (57%) had university degrees, a further 18% had some university education, and an additional 9% had a diploma.

In terms of income, more than half (60%) were in a middle-income category of R120-600 000 per annum. About 12% were more affluent (more than R600 000), while only 12% earned less than R120 000.

In terms of domestic tourist categories, these tourists are likely to be in the "Well-off Homely Couples" or "Golden Active Couples" categories. In terms of foreign tourists, these travellers may fall into either the "Wanderluster" or "Next Stop South Africa" segment.

6.3 THE KAROO TOURIST

It is important to understand the current tourism market in the Karoo.

Tourists have several reasons for visiting the Karoo:

Table 7: Reasons for visiting the Karoo

Reason for visiting	Number of mentions	Percentage
En route to a city outside the Karoo	47	21
Holiday in the Karoo	62	28
Motoring/camping holiday around SA	27	12
Motoring/camping around Southern Africa	4	2
Business	34	16
Tourism related to FIFA	20	9
Other	26	12
Total	220	100.0

Through-travellers are typically from Johannesburg, Pretoria, Cape Town, Port Elizabeth and Durban. Significantly, new through-routes in the Karoo are offering alternatives to the N1 highway; these routes include the Namaqualand/Upington “Green Kalahari” Route and the Cape Town/Graaff-Reinet route to the Eastern Cape interior.

An important tourist sector, which has not been studied adequately, is weekend tourism, particularly on long weekends. This affects, particularly, the Little Karoo and towns such as Prince Albert and Steytlerville. Weekend tourism in the Karoo, from Bloemfontein and Port Elizabeth, should also be encouraged.

Some tourists learnt about it from guide books or from word of mouth. Then there were a smattering of other reasons to visit the Karoo, which suggests the type of people who made the choice to stay over in this region: sightseeing, curiosity and visiting unique places; visiting farms, game farms or game parks; they enjoyed history and heritage; and they liked doing nature-based activities. Clearly, many tourists did some research about the Karoo before their visit.

Tourists were asked whether they would like to return to the Karoo:

Table 8: Desire to return to the Karoo

Would you like to return?	Number of mentions	Percentage
Yes	158	76
No	11	5
Maybe	17	8
Total	186	89

The tourists also gave unprompted replies about the Karoo experiences which they enjoyed most (in declining order of importance) : Natural beauty and landscapes, open vistas, fresh air and sunshine, peace and tranquillity, heritage, wild animals, open vistas, friendly people, authenticity and charm, food and local products.

The survey of tourists included open-ended questions on what they like about the Karoo. The following types of responses were received. These were then categorised as: Authentic, Convenience, Curious, Loyal, Rest, and Excitement:

- "Authentic": People's need to have a unique, meaningful experience
- "Convenience": Utilitarian considerations
- "Curious": People's desire to seek new experience and to find things out for themselves – they may not actually like the new experience, but at least it is novel
- "Excitement": People's desire for thrills and an element of danger
- " Rest": People's desire to be quiet and tranquil
- "Loyal": People who return out of a sense of fondness for the familiar locality.

Table 9: Types of motivations to stay over in the Karoo

Why did you choose to stay over in the Karoo?	Type of motivation
History, heritage site	Authentic
Sight-seeing, curiosity, unique place	Curious
Good geographic position, halfway stop	Convenience
Just passing through	Convenience
Work or business	Convenience
Natural environment, game park, dam	Authentic
Visiting friends and family	Convenience
Psychological experiences, atmosphere	Authentic
Good clean accommodation	Convenience
Word of mouth, reputation	Curious
Nice, quaint town	Authentic
Previous visits	Loyal
Holiday, relaxing	Rest
Activities, adventure	Excitement
Hunting	Excitement
Learnt about it from media or guide books	Curious
Learnt about it from internet	Curious
Climate, dry, warm	Convenience
Agri-tourism, farmstays	Authentic
Art	Authentic
Cuisine	Authentic
Photography	Authentic
Affordable, value for money	Convenience
Health and wellness	Authentic
Research	Curious
Sport	Excitement

The frequency of the responses gives an impression of several different motivations. Based on this classification of reasons, the following motivations are listed, in order of priority:

Table 10: Motivations for staying over in the Karoo

Type of motivation	Percentage of mentions
Authentic	34 %
Curious	16
Convenience	34
Loyal	5
Rest	3
Excitement	7

A large category (28%) was travelling through the Karoo *en route* to another city outside the Karoo. However, a slightly larger category (30%) claimed to be having a *holiday in the Karoo*. This is a significant statistic, as it indicates that the Karoo is becoming a holiday destination.

6.5 WHAT DO TOURISTS LIKE TO DO IN THE KAROO?

During their stay in the Karoo, these tourists looked forward to the following activities: Eating out at restaurants; which suggests that these are affluent tourists who enjoy cuisine; visiting game farms or game parks, visiting museums or heritage sites, and shopping.

When asked what activities they plan to undertake, the tourist interviewees recorded the following:

Table 11: What do tourists like to do in the Karoo?

Type of motivation	Number of responses (includes multiple responses)	Percentage
Eating out at restaurants	120	28
Shopping	59	14
Visiting museums or heritage sites	98	23
Visiting private game farms	40	9
Visiting public game parks	41	10
Visiting friends and relatives	45	11
Other	26	6
Total	429	100.0

The most frequently cited activity was *eating out* (29% of responses), which suggests that a focus on Karoo cuisine may well be an important aspect of future tourism product. Similarly, *shopping* (14% of responses) is an important issue, which suggests that a focus on Karoo craft production and marketing may be important. Visits to *heritage sites* remains a very important activity (23% of mentions), which implies that the management and marketing of Karoo museums and heritage sites should be a top priority. *Game parks and game farms* together constitute 19% of responses, with obvious implications for the management and marketing of the Karoo natural resources.

When asked how long the tourists plan to stay in the Karoo on *this* trip, the majority (40%) maintained that they were only staying for one night. A significant minority (26%) were staying for two nights, 18% for 3 nights, 9% for four nights, and the remainder for 5 nights and longer. This suggests that at least 60% of people made a point of remaining in the Karoo for longer than an overnight convenience stop, which suggests the beginnings of the "Karoo as destination" (even though it may only be an interim destination on the way to

another locality).

Tourists were also asked whether they regarded the Karoo as a potential destination in future:

Table 12: The Karoo as a future destination

Will you consider the Karoo as a destination in future?	Number of responses	Percentage
Yes	160	75
No	12	6
Maybe	19	9
Total	191	90

A remarkable majority (75%) maintained that they would like to return to the Karoo as a destination. Nine percent of responses were indecisive, indicating that they may well be persuaded, by means of effective information and marketing campaigns.

6.6 WHAT DO TOURISTS FIND MOST APPEALING ABOUT THE KAROO?

then categorised into various headings: Landscape, Psyche, History, Products, Society and Novelty.

Table 13: Types of attractions in the Karoo

What do you enjoy about the Karoo?	Type of attraction
Openness	Landscape
Cleanness	Landscape
Fresh air	Landscape
Peace, tranquillity, silence, solitude	Psyche
Unspoilt, quaintness, authenticity, beauty	Psyche
Heritage	History
Remoteness, desert	Landscape
Local products	Products
Hospitality, friendly people	Society
Night skies, stars	Landscape
Nature, scenery, landscape, dam, veld, sunsets, birdlife, climate, wildlife, parks, hunting, nature activities	Landscape
Safety	Society
Food and wine, Karoo lamb, restaurants	Products
Ambience, relaxing	Society
Good management	Society
New experiences	Novelty
Political history	Society
Dust roads	Landscape
Good roads	Landscape
Small towns	Landscape
Fossils	History

These categories received different levels of responses:

Table 14: Prevalence of attractions in the Karoo

Type of attraction	Prevalence of mentions
Landscape	50
Psyche	20
History	4
Society	20
Products	6
Novelty	0.2

Five people spontaneously mentioned the safe environment as an aspect of the Karoo which they enjoy.

6.7 CONCLUSION

The Karoo tourist market consists of two main categories: Travellers passing through the Karoo, and tourists who are making the Karoo a destination – either as a mini-destination *en route* to other destinations (e.g. coastal cities), or increasingly, as a destination in its own right.

The passing-through and short stop-over markets are already fairly well developed. People are increasingly combining *convenience* considerations with a definite preference to stay over in the Karoo as a special experience – often at the same town, guest house or guest farm, because they are loyal to those localities or service providers. These considerations provide a reliable tourist market, particularly along the main highways.

However, many towns are now positioning themselves as niche destinations, based on tourist attractions as diverse as river rafting, astro-tourism, palaeontology, literary tourism, mountains, and architecture. A major new step is now required, to identify the comparative advantages of different Karoo towns and subregions.

The overview of Karoo tourists show that they are generally middle-aged and elderly (the over-30 market), who like to experience new and authentic places. The extraordinary diversity of tourist attractions will make the Karoo appeal to a wide array of travellers who will respond to desert tourism marketing campaigns. For this, a united approach to Karoo tourism marketing is required.

7. Tourism strategies and outcomes

This section proposes several major interventions to promote tourism in the Karoo as a holistic region.

7.1 REGIONAL TOURISM INSTITUTIONAL ALIGNMENT

This Regional Strategy is based on the premise that collaboration between the four Karoo provinces can be secured. This will be required at two levels:

1. Strategic tourism planning, in the provincial Departments of Tourism
2. Tourism marketing, involving the provincial Tourism Agencies (NCTA, CTRU, ECTB and ECTB).

Thereafter, collaboration must be secured between Karoo District Municipalities, Local Municipalities, and their respective tourism committees (District Tourism Organisations, Local Tourism Organisations and Community Tourism Organisations).

Once a framework agreement has been established between the four Karoo provinces (facilitated by the National Department of Tourism), then incremental, piece-meal collaboration can be developed between Karoo towns, on common themes.

A suitable institutional vehicle will need to be created, i.e. a shared Karoo Tourism Agency, backed by the National Department of Tourism, which assists the four Karoo provinces to co-ordinate their tourism strategies.

The role of the Central Karoo District Municipality, with Beaufort West as the central town, as a rural tourist node is a crucial lever to mobilise government and private resources. However, the DM should be seen within a broader regional context. There are many linkages between the Central Karoo and areas outside the Central Karoo, including Graaff-Reinet (the other key Karoo town), Carnarvon (hosting SKA), Sutherland (hosting SALT), Richmond (the Karoo booktown), Victoria and Britstown (two key Karoo tourism towns), and links with Colesberg and Gariep Dam along the N1 highway.

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 in Beaufort West, although with satellite offices in other towns.

Such a proposed Karoo Tourism Agency will be the main driver of this Karoo Tourism Strategy. It will be critical to create a strong Board, representing Karoo provinces and District Municipalities, as well as the private sector. The leaders of the Agency should be very experienced in tourism product development and marketing. The initiative should receive adequate funding from national and provincial authorities, as well as private subscriptions and corporate grants.

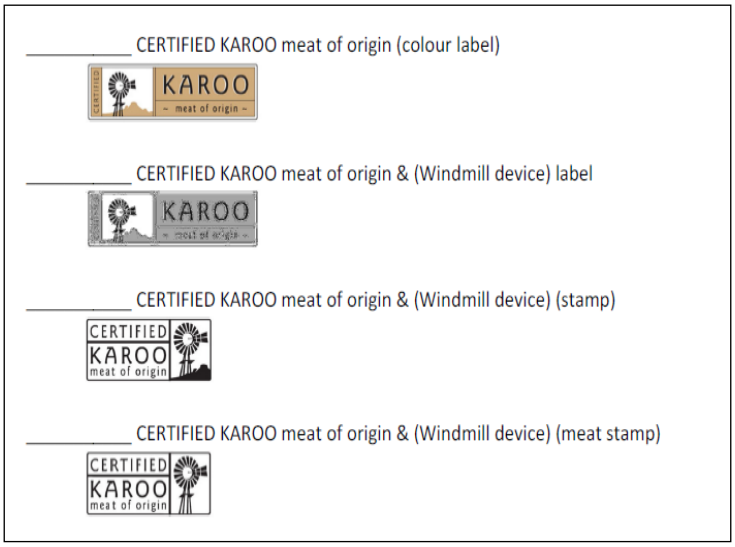
7.2 REGIONAL BRANDING

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, which Karoo tourist operators can use to declare their authenticity as Karoo enterprises.

A similar certification mark has already been registered by the Karoo Development Foundation, on behalf of the people of the Karoo, for the Karoo Lamb project: (see the official Karoo Lamb website: http://www.karoomeatoforigin.com)

Figure 3: Karoo Lamb branding



A Karoo Crafts brand name has been registered, which can be used by Karoo crafters to certify the authenticity of their products:

Figure 4: True Karoo Crafts

A study of existing Karoo brands should be undertaken, to promote synergies between them. An overarching Karoo brand should not detract from regional, route or niche tourism brands which have already been developed. Examples of existing Karoo brands are Route 62, Karoo Highlands Route, Karoo Heartland Route, and Richmond Booktown.

7.3 REGIONAL TOURISM PRODUCT DEVELOPMENT

During this process, a key discussion will be around the identification of tourism products at regional scale. Tourism service providers can be engaged to conduct feasibility studies to identify region-wide attractions and products.

Subsequently, donor and government funding should be secured for product development, particularly to promote SMMEs, skills training, employment and heritage conservation.

The process will involve the hosting of Value Chain Workshops and Meetings, including the definition of tourism routes, and linkages between 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.

The process of identifying regional tourism products will involve certain generic procedures:

- Identifying the key partners
- Developing terms of reference for business plans, and writing funding proposals
- Supporting community tourism initiated projects linked to larger projects
- Promoting community and crafts centres
- Creating effective information centres

A data-base of over 1 000 Karoo tourism attractions exists already.

Important new tourism sectors need to be identified, researched and promoted. This should include, for example, literary tourism (e.g. Olive Schreiner, NP van Wyk Louw), “struggle” tourism (e.g. the Colesberg Museum), Anglo-Boer War tourism (e.g. block houses and commando routes), hunting, mountain biking, hiking, rock art, and cemetery tourism (linked to genealogy websites). In many cases, these attractions already exist, but need to be researched, developed, and marketed as tourism themes, routes or niches.

7.4 SHARED REGIONAL MARKETING

Based on the identification of existing and potential Karoo attractions, a shared marketing strategy is needed between the four Karoo provinces.

This approach can be based on the “co-opetition” model, which entails horizontal competition between enterprises, but vertical cooperation in certain areas, such as marketing and research. A regional organization is necessary to promote such shared initiatives.

7.5 TOURISM SKILLS DEVELOPMENT

The Karoo Tourism Strategy should be used to promote employment in the tourism sector. This requires extensive efforts to train local residents in the hospitality industry, tour guiding, cuisine, and supplementary activities, such as transport, construction, and building renovation. Where possible, such training should be certified, leading to career progression in the tourism sector. However, more informal training programmes should also be recognised and promoted.

The Tourism and Hospitality Education and Training Agency must be a partner of the Karoo Tourism Agency, to co-ordinate and fund training programmes.

7.6 PROMOTING SME'S

SMEs (Small and Medium-sized Enterprises) are critical to the economy, as they are the main creator of jobs. SMEs are typically formally registered businesses, often serving niche markets. They may be managed from home, or from formal business premises. They are often well developed in terms of technology, clientele and business sophistication.

The challenges faced by SMEs are often to reach new markets, adopt new technologies, find skilled staff, and access higher levels of capital. Many SMEs have already invested heavily in their enterprises, but find it difficult to break through key constraints. Business support systems, such as finance from commercial banks, may be required.

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.

7.7 PROMOTING MICRO-ENTERPRISES

Micro-enterprises may be either formal or informal. Formal micro-enterprises consist of the entrepreneur and a few employees; informal micro-enterprises may not employ any staff at all, or only employ people on a very *ad hoc* basis, without formal contracts.

It is therefore important not to confuse "micro-enterprises" with the "informal sector".

Furthermore, neither micro-enterprises nor informal businesses are necessarily low-income. Many middle-class people may operate informal enterprises, such as informal catering or "home industries".

The common theme linking various types of micro-enterprises is that they can identify very niche markets, based on the work of the entrepreneur with just a few workers or helpers. These are typically in activities which have low barriers to entry, such as very small B&Bs (often only 1-2 rooms in an existing house), crafts, or catering (often based in an existing residence).

At the very low-income end of the spectrum are activities undertaken by relatively poor people, such as street-level craft manufacture or sales.

Micro-enterprises are often very vulnerable to changing markets, economic recessions or other setbacks or shocks. They often (but not always) have very limited savings or capital, low levels of technical skill, very little insurance, and unreliable work forces, who are not formally employed. Micro-enterprises play a crucial role in assisting households to survive and to develop business skills, but they face significant risks, and their failure rate is high.

It will be important in the Karoo Tourism Strategy to identify the most effective points of entry of poor people into the business system. This may well be in the craft and catering sectors, rather than accommodation, which requires more capital inputs and expertise. In countries such as Australia, indigenous art has been developed deliberately from extremely poor origins into highly sought after art forms. Institutions such as the Cape Craft Development Institute (CCDI) can play an important supportive role. The four provincial Departments of

Arts and Culture can assist in developing Karoo crafts.

As the tourism sector in the Karoo expands, there will be a growing demand for artisans (builders, painters, plumbers, electricians) to service the guest houses and restaurants. These are ideal micro-enterprises, as they involve one person with qualifications, and several employees who learn on the job. It is through these value chains (money passed from entrepreneur to entrepreneur), that local economic multipliers will be created, and the leakage of money to the cities will be curtailed.

7.8 PROMOTING APPROPRIATE INFRASTRUCTURE

Karoo tourism requires:

1. Signage
2. Road maintenance (tarred and untarred roads)
3. Urban street maintenance
4. Central Business District refurbishment in the Karoo towns (including offering incentives and guidance to private sector, with appropriate municipal regulations)
5. Well managed attractions, such as museums, picnic sites, walks, and camping sites
6. Municipal services, e.g. cleaning road verges, cemeteries and waste disposal sites
7. Safe parking facilities.

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

7.9 CENTRALLY LOCATED AIRPORT

The Karoo requires an effective system of transport, using all modalities, such as air, road and rail.

A major issue is the creation of an airport, with an all-weather runway, night lights and scheduled flights. A central Karoo airport would link with larger centres and airports, such as Cape Town, George, Port Elizabeth, Bloemfontein, Johannesburg, Pretoria and Windhoek.

Such an airport should also be linked with other Karoo airports and airfields, in a “hub and spoke” system of centre-periphery air transport linkages. Airports such as Graaff-Reinet, Carnarvon and De Aar would receive more traffic.

There is a *prima facie* argument that the “hub” airport of the Karoo should be located in Beaufort West, for three reasons:

- The logistics infrastructure in the town (N1 highway and main north-south rail link).
- Beaufort West is centrally located in the Karoo, equidistant between the Western Cape, Northern Cape and Eastern Cape. A radius of 200 km from Beaufort West will reach the following towns: Prince Albert and Merweville in the Western Cape; Graaff-Reinet and Aberdeen in the Eastern Cape; Sutherland, Fraserburg, Victoria West, Carnarvon and Strydenburg in the Northern Cape.
- Beaufort West is one of the three strongest retail centres in the Karoo (on a par with Graaff-Reinet and Calvinia).

7.10 SPECIAL TOURISM INITIATIVES

Once the Karoo Tourism Agency has been created, a range of special programmes can be set in motion:

1. Promoting District, Local and Community Tourism Organisations throughout the Karoo
2. An annual Karoo Week
3. A calendar of Karoo Events and Festivals
4. Video marketing of Karoo highways, routes and locations
5. Niche-based routes and relationships, linking Karoo towns
6. A data-base of game farms and lodges
7. A data-base of hospitality service providers
8. Promoting municipal facilities management
9. Developing the Orange River, Gariep Dam and Vanderkloof Dam area (the “Karoo Riviera”)
10. Developing the SALT/SKA area as the foremost astro-tourism region in the world
11. Developing the Beaufort West Airport as the central Karoo airport, with scheduled flights and car rental, linked to other Karoo airports in a hub and spoke system
12. Negotiating with Spoornet about Karoo Railway Tourism
13. Developing Karoo geo-parks
14. Promoting game farms and hunting tourism, and increasing the multipliers from this form of tourism in local Karoo towns
15. Promoting weekend tourism
16. Creating and maintaining partnerships with other desert regions in the world.

7.11 KAROO TOURISM RESEARCH

Ongoing tourism will be required, on a range on key themes:

1. Business intelligence, regarding the tourist market in the Karoo
2. Data-bases and qualitative information on Karoo tourism assets and products
3. Tourism trends
4. Environmental impacts of tourism, and the impacts of other sectors (such as mining and transport) on tourism
5. Tourism economic multipliers
6. Tourism training systems
7. The “business ecology” of Karoo towns, and the role and prospects of the tourism sector
8. Changing tourism perceptions about the Karoo.

8. Next steps

Several key institutional interventions are now required to conceptualise Karoo tourism as a regional approach.

Step 1: Create informal networks across provincial and district boundaries, through the DTO/LTO/CTO structures, and the creation of informal and semi-formal trans-boundary collaboration and collaborative networks. This can be done through workshops, conferences, and joint projects, such as those of Open Africa.

Step 2: Conduct a full product audit and gap analysis and a review of current institutional arrangements in each of the different regions. In particular, the relationships between municipalities, tourism information centres, DTOs, LTOs, CTOs, provincial marketing agencies and provincial tourism departments, need to be clarified and streamlined. National funding should be secure for this research. All tourism stakeholders should be consulted during the process. Provincial tourism departments should be involved in designing the research methodology.

Step 3: Facilitation by the National Department of Tourism (NDT) of an interprovincial discussion on a Karoo tourism strategy, and drafting an MOU.

Step 4: Signing an interprovincial MOU, with the National Department of Tourism as a key partner and custodian.

Step 5: More formal co-ordination of institutions, e.g. the four provincial Departments of Tourism and their associated Provincial Tourism Associations, District and Local Municipalities, publicity associations, heritage organisations, and local community-based organisations, through a single Karoo Tourism Agency. A suitable funding strategy must be devised, consisting of a combination of a national grant, provincial grants, and private sector subscriptions.

Step 5: Promoting the development of a Karoo Airport in Beaufort West, with a tarred runway, scheduled flights (e.g. SA Express), car rental, and “hub and spoke” links to other Karoo airports and airfields.

REFERENCES

Department of Trade and Industry (DTI) (2010), *Industrial Policy Action Plan (IPAP) 2.*

Eastern Cape Government (2009), *Tourism Master Plan 2009-2014*, Department of Economic Development and Environmental Affairs East London.

Free State Provincial Government (2005), *Provincial Growth and Development Strategy, 2005-2014,* Bloemfontein. http://www.fs.gov.za/FSGDSChapters.htm

National Department of Tourism (2011), *National Tourism Sector Strategy.*

National Department of Tourism (2011a), *Draft Rural Tourism Strategy.*

National Planning Commission (2011), *National Development Plan*, Pretoria.

National Presidency (2010), "Guide to the Outcomes Approach".

Northern Cape Government (2005), *White Paper on Northern Cape Tourism*, Kimberley.

South African Tourism (2009a), *Marketing Mzanzi to South Africans,* Pretoria.

South African Tourism (2009b), *Domestic Tourism 2008 Performance,* Pretoria.

South African Tourism (2010a), *South African Tourism Annual Report 2009/2010,* Pretoria.

South African Tourism (2010b), *The Marketing Tourism Growth Strategy for South Africa, 2011-13,* Pretoria.

Western Cape Provincial Government (2010), Department of Economic Development and Tourism, *Five-Year Strategic Plan, 2010-2015*, Cape Town.

Western Cape Provincial Government (2012), Department of Economic Development and Tourism, *Annual Report 2011-2012*, Cape Town.

Thanks to Karoo stakeholders who commented on the draft Strategy:

1. Ms Nicole Crozier, UrbanEcon, Port Elizabeth
2. Prof Ronnie Donaldson, Stellenbosch University
3. Charles Roux, Bergkant Lodge, Prince Albert
4. Francois Viljoen, Open Africa and independent consultant
5. Jill Waterman
6. Dr Daan Toerien, Centre for Development Support, UFS

ENDNOTES

1. The fact that the survey was held during FIFA month may have over-reflected international visitors, compared to the usual tourism profile in the Karoo, as well as through-travelers, who could not access flights during that period.