

Creating critical mass

It is crucial that the attraction offer a number of differentiated, yet complimentary visitor experiences. By including a range or cluster of different, but complimentary components within the entire attraction precinct, the attraction can provide a comprehensive product. These components may include a visitor centre, museum, interactive facilities, viewing platforms, food and beverage outlets, curio shop, pathways, landscaped gardens, etc. In other words, there will be a range of "things to see and do" to keep the visitor busy for a few hours.

The Greenwich tourism experience, London, United Kingdom

"Zero longitude", "meeting of East and West", "mean time", are some of the concepts that spring to mind when thinking of Greenwich in England. The Greenwich Royal Observatory is after all the point from which every clock and map is based and where one can be in two hemispheres at the same time! However, there are much more to explore at Greenwich than just the observatory.



A number of attractions, facilities and activities that are located near and around the Royal Observatory form a "tourism precinct" that offers a comprehensive and complimentary tourism product. To the tourist, Greenwich offers a variety of experiences around time and space, naval heritage, historic buildings, museums and churches. Some of the attractions offering these experiences include:

- The Greenwich Royal Observatory;
 - The National Maritime Museum;
 - Royal Naval College;
 - Cutty Sark;
 - Gipsy Moth IV;
 - Russian Submarine;
 - Queen's House;
 - Ranger's House;
 - Greenwich Royal Park;
 - Fan Museum;
 - Thames Barrier;
 - Museum of Artillery in the Rotunda;
 - Trinity Hospital;
 - St Afege Church;
 - St Luke's Church;
 - Our Lady of the Sea; and
 - St Margaret's Church.
- The Greenwich Tourist Information Centre and a wide range of tourism support infrastructure, public facilities and amenities support this cluster of attractions.

The range of "places to see and things to do" at Greenwich provide the critical mass needed to make it a successful tourist attraction within London as the destination.

Directing visitor flows

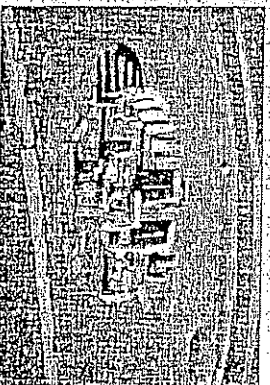
Directing and guiding of visitors around the attraction is an important part of visitor management and is an element that has an influence on the sustainability and success of an icon attraction. It is necessary to direct visitor flows for the following reasons:

- protecting sensitive natural areas,
- ensuring visitor safety;
- manipulating a progressive order of visitor encounters;
- creating a sense of arrival;
- building suspense to achieve the desired a sense of place;
- enhancing the visitor experience by instilling the desired symbolism, meaning and purpose; and
- simplifying the overall visitor management process.

Visitor flows can be influenced and manipulated through distinguishable entry and exit points, designated vehicle and coach parking, visitor drop of zone, orientating visitor centre, appropriate pathways and signage, elevated viewing platforms, appropriately placed rest point, etc.

Moving visitors through Stonehenge, Wiltshire, United Kingdom

Stonehenge, located two miles West of the town of Amesbury, in Wiltshire, England is Britain's greatest prehistoric monument. Built in three phases between 3050 BC and 1600 BC, it stands at the centre of a ceremonial landscape containing 450 scheduled ancient monuments of national importance. Stonehenge exudes a powerful sense of mystery, spiritualness and symbolism, which has enthralled successive generations – why did man build this breathtaking monument, and how was this great engineering feat achieved?



As an icon attraction of England, one is unlikely to experience Stonehenge alone. Even on a cold and wet winters day it attracts more than a 100 visitors on average. In the past one could wander amongst the stones, but increasing visitor numbers has resulted in damage to the monument and necessitated the implementation of visitor management plans. This included directing visitor flows to preserve the monument and the surrounding sensitive environment and to control visitor movement around the site. A road divides the parking area from the main site.

Interactive experiences and engaging the senses

The concept of visitor attractions has undergone considerable change in recent years. Facilities have become much more participative and interplay between the visitor and the environment is encouraged. Successful icon attractions include exhibitions and activities that relate to and involve the audience by combining entertainment and education. The use of modern technology has become vital in this regard. Such exhibitions does not only comprise lighting and sound techniques, but also various effects to create emotions or play on existing emotions in order to elicit response from the visitor/audience and build the desired atmosphere. By including interactive components at an attraction, considerable value can be added to the overall visitor experience.

The interactivity of a visitor experience is closely related to the exploitation of human senses plays an important role in attraction development. The aim is to create something unique through setting the scene, making an impression, creating sensations, evoking emotions, building image and vibe and drawing upon the symbolism and soul of the attractions. In this regard what brings together all these elements is the use of the five senses- smell, sight, hearing, taste and touch.

A good example of an interactive experience that engages the visitor's senses can be found at Land's End, the most westerly points of the United Kingdom.

Return to the Last Labyrinth at Lands End, United Kingdom

Return to the Last Labyrinth is a multi-sensory and audio-visual extravaganza at the visitor complex in Land's End, at the most westerly point of the English mainland in the United Kingdom. This multi-sensory experience capitalise on powerful images such as the fabled Jews, dramatic cliffs and surging Atlantic ocean at Land's End, to enhance the core themes of mystery, legend, adventure and tales of heroism around which the shows are built.

The attraction is housed in a custom built building into which the visitor enters and is taken down, simulating the descent down the steps of a lighthouse. Arriving at the bottom of the steps, visitors must make their way through a dark cavern, with the intention to disorientate them and to make them receptive to surprises such as dangling cobwebs, etc.



The focal point of the *Return to the Last Labyrinth* experience is a massive cave, built to the size of an aircraft carrier. A projection at the front of the cave focuses the visitors' attention of a scene depicting the sea. Authentically is lent to the scene by fake rocks surrounding the screen and a life size model of a shipwreck on the rocks. Dim lighting and audio sound effects imitating the sea provide added realism. Additional giant screens suspended from the ceiling depict the horizon and stormy sky. Fake lightning, wind machines and water sprayers further simulate the stormy weather. Hydraulics beneath the shipwreck rocks lift it up and fro during the simulated storm and makes the whole experience more authentic.

The experience set against the backdrop of a storm, tells the stories and legends of Land's End and provides the visitor with a sensational, exciting and memorable experience, rather than just seeing it in a static museum display. Props and decor in the cave are moved away or replaced to create different scenarios and present different multi-sensory shows. Some of the legends, adventures and experiences related to Land's End recreated in this way include:

- The land of Lyonesse - the legend of the King Arthur and how the mythical land of Lyonesse disappeared beneath the ocean near Land's End.
- The Relentless Sea - the heroic story of a man's struggle to earn a living from the bountiful but unforgiving sea, and
- All-Sea Rescue - a modern day dramatic and realistic re-enactment of a typical all-sea rescue from the treacherous waters of Land's End.

The *Return to the Last Labyrinth* show capitalises on the stimulation of human senses to form an integrated performance that provide a fantastic and memorable visitor experience. It has become an icon attraction that draws visitors to Land's End.

Placing emphasis on the senses enables the creation of different tempos in different areas in order to achieve identity, induce emotion, contrast and fit.

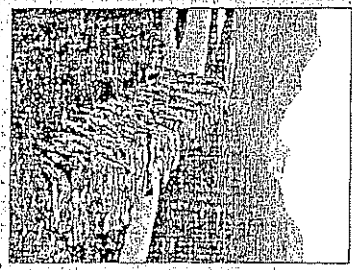
The *Return to the last Labyrinth*' experience represents an extreme in the use of sight, sound and other sensory stimuli. Inclusion of the example in this section does not to imply that the same concepts and use of artificial sensory stimulation should be applied at the Southern most point. As is the case with other examples, the purpose is to provide perspective on the principles driving successful attraction development. Responding appropriately to the local environment and context must remain an overriding consideration in determining the eventual nature and content of the icon attraction for Cape Agulhas.

quotes build suspense and stimulate the visitor to advance along the trail towards the crag. Appropriately shaped rocks from the area are used as way markers along the trail and lead visitors to specific nodes along the trail.

Stone slabs at rest or seating areas have carefully chosen poems sandblasted into them to reinforce a sense of place and the relative insignificance of humans in relation to the grandeur of the landscape.

When visitors reach the point where the thrust is exposed, two large colour coded stone hands carry the key message that the rocks above the thrustline is 500 million years older than the rocks below. The sense of place is further instilled when visitors place their hands on the different rocks.

The ultimate sense of place however, is experienced when the visitor reaches the stone sculpture at the top of the escarpment. No interpretation is provided, but the presence and setting of the sculpture, the breathtaking view and the surrounding landscape affects the visitor in a inspiring, yet subtle way.



The focus is on reaching out to the visitor's senses and emotions through intricate architectural and design attributes of the attraction, theming, use of sensory experiences, etc. Creating a flowing movement through the attraction, landscaping and the utilisation of local raw materials is fundamental in order to achieve this aim.

Design and decor

The use of traditional architecture and design in the construction of attraction components should be reflective of the culture and natural heritage of the surrounding environment. Topography and local climatic conditions are additional considerations that may impact on layout and design. The adoption of styles that depicts such influences should manifest themselves in the built environment at the attraction. Inspiration for example can be drawn from the innovative yet original concept used in the design of the Australian National Wine centre in Adelaide, Australia.

Innovative design at the National Wine Centre, Adelaide, Australia

The National Wine Centre in Adelaide Australia was built as a wine themed attraction and offers visitors the opportunity to experience the diversity and quality of Australian wines in a number of exciting, enjoyable ways. Through its unique design, use of material and the creative utilisation of space, acoustics, light, sound and multi-media technology, this icon of the Australian wine industry offers visitors the chance to experience the culture, atmosphere and essence of the wine production process from growing of grapes to enjoyment of the end product.

Natural elements of the wine industry have been used during construction of the centre in order to enhance the theme, symbolise and represent specific aspects of wine production and create an icon attraction that is unique. Soil from different wine producing regions across southern Australia was used in the construction of the largest rammed earth wall in Australia.



Aesthetically pleasing, the rammed earth wall contributes to the uniqueness of the centre and represents an important element in of the wine industry and the Australian environment. The wall provides a striking backdrop to the three main exhibition halls.

Various wine industry related equipment and building material were also used throughout the construction design and decoration of the centres interior. Different materials and decorations such as barrel tops, stainless steel sheets, scaled down wine making equipment, wine cuttings, bottles, wine glasses, etc. were used as decor and furnishings in the different sections of the centre. The effective use of these materials significantly contributes to setting the scene, creating the desired atmosphere and providing an authentic and enjoyable visitor experience. In addition, building materials used on the exterior of the building were selected so as to allow the entire centre to blend in with the surrounding environment.

Design, layout and decor of an attraction play an important role in being appropriate in a specific location, enhancing a theme and providing a memorable and enjoyable visitor experience.

Creating a sense of arrival and a sense of place

The approach to an attraction is an important element in building suspense. In this regard, the entire attraction should not be revealed at once and visitor flows can be manipulated to achieve the desired build-up of curiosity, emotion, and anticipation and create the desired atmosphere. An appropriate mix of components set in a logical and progressive sequence will contribute to the process of building up to a climax when the highlight of an attraction is revealed, and the visitor realises that he/she has arrived.

Finding the Lost City, South Africa

The well known Lost City at Sun City in the North West Province of South Africa provides a good example of how layout, design and theming at an attraction can build anticipation and provide a sense of arrival to tourists. Visitors to the Sun City resort move from the car park by motorail to the various complexes at the resort. One such complex is the Lost City Entertainment Centre.



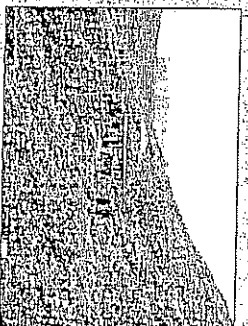
Upon their exit from the complex, visitors find themselves at one end of The Bridge of Time. The impressive bridge of ancient appearance guarded by life-size Elephant statues forms the link between the older part of Sun City and the entrance to the Lost City. When visitors cross the bridge, it shakes as an imaginary volcano erupts, building atmosphere and suspense. After crossing the bridge, the visitor reaches the Kong Gates that leads into the Lost City. The massive and imposing gates open to reveal the Lost City and the Valley of Waves and signals the visitors arrival.

The Bridge of Time and the Kong Gates at the Lost City in South Africa's Sun City resort is an excellent example of how suspense and anticipation is evoked in the mind of the visitor, with the large gates that mark the entrance to the Lost City providing a sense of arrival.

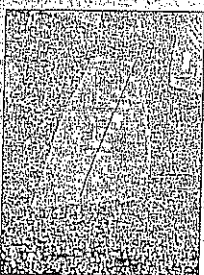
In addition to building up to a sense of arrival, the concept of *genius loci* or sense of place is created in a manner that embrace the visitor, making him/her feel part of the surrounding environment to as large a degree as possible. A large part of the visitor experience involve the "sensory consumption" of the environment and surroundings at the destination. Specific elements such as landscape, architecture, building materials, local culture, distinguishing objects, cuisine, etc. will establish for the tourist a sense of place and entice a second visit, personally or through word-of-mouth.

Building materials captures the sense of place at Knockan Crag, united Kingdom.

Knockan Crag is located on a small escarpment within the Assynt district that lies in the far north-western Scottish highlands and is of great significance to the study of geology. Funding was made available to develop an interpretation project and establish Knockan Crag as a flagship site for presenting earth sciences to a wide audience in a popular way. Development of the site included landscaping, path construction, the building of a visitor centre and the installation of a geological trail to the site's key feature - a spectacular exposure of the Moine Thrust (a geological junction between different rock strata). The development of Knockan Crag illustrates how materials used for interpretation contributes to enhancing the sense or spirit of place that the visitor experiences. The experience starts in the car park where an installation that models the geology of Knockan Crag provokes the visitor to ask, "what happened here and why is it so important?" The Knockan wall is built from various rock types found in the crag and its outline echoes the shape of the crag, simplifying the way in which different rocks form a cliff. A wheelchair friendly path with appropriate signage leads the visitor to the Rock Room, an un-staffed, open shelter with a turf roof that forms the main visitor centre. It has been designed to both blend in with the environment, look interesting and to prompt visitors to get out of their cars.



A series of engraved rocks, each carrying a single arresting word (i.e. thrust, force, grind, slip, stooshe, time, etc.) are embedded in the path to the entrance of the visitor centre to stimulate curiosity and build atmosphere. Upon entering the Rock Room, the visitor is faced a number of exhibits, (i.e., graphic descriptive panels, a time wall depicting Earth's geological evolution, mechanical/interactive exhibits,



geological maps, specimens of rocks, etc.) that combine to provide an interesting way to communicate an otherwise dull and technical subject. The building is open on one side to reveal a spectacular view of the glen below. Interpretative displays identify the peaks that visitors can see and relate the landscape to its underlying geology. Mounted ceramic tiles with striking



1 Introduction

The importance of access, support infrastructure, available skills, critical mass of tourism product, etc. as important factors in destination development have already been discussed. One of the most critical factors however, is the presence of an icon attraction that has the pulling power and acts as the catalyst or motivator for tourists to travel to a particular destination. The southern-most point in itself and its location at the tip of Africa lends itself to the development of such an icon attraction. Careful planning in the development of an attraction that will draw tourists to the Cape Agulhas region and build a successful destination requires that a number of factors be considered. Some of these factors are discussed below.

2 Theming

Themed attractions have become important in tourism destinations in terms of enhancing and showcasing attributes, commercial products, atmosphere, etc. offered by a destination, region or country. Theming of attractions are increasingly used to capture culture and heritage and have even been used to position towns as commercial and technology centres. A theme built around a core component in an attraction allows opportunity to expand the visitor experience by adding components linked to the theme.

Mount Rushmore National Memorial, South Dakota, USA

The Mount Rushmore memorial was the vision of Doane Robinson, the superintendent of the South Dakota State Historical Society, who in the early 1920's had the idea of carving famous western heroes into the skyline of South Dakota. The idea gained support over time and when the sculptor, Gutzon Borglum, came on board, the vision broadened to focus on national heroes rather than just regional ones.

The sculpturing process took 14 years and when complete, depicted the faces of four American Presidents (Abraham Lincoln, George Washington, Thomas Jefferson and Theodore Roosevelt) to reflect serenity, nobility, power and inspiration. Today it is the largest work of art on earth with each face measuring 60 feet in height, each nose 20 feet long and each mouth 18 feet wide.

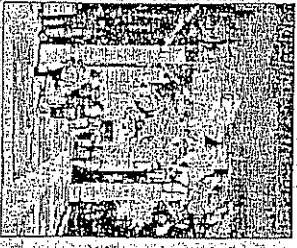


A complementary cluster of tourism products has subsequently been developed around the sculpture as the main attraction and the central theme of memorialising the birth, growth, preservation and development of the United States of America that is captured in the spirits of these great men. The facilities, developed around the memorial, include visitor parking, an amphitheatre, museum/theatre complex, visitor orientation centre, a presidential trail, gift shop, bookstore, and dining facilities. It is not only these facilities that provide the critical mass required to make the monument successful, but also the alignment of the attractions and activities offered to the central theme. Supporting attractions enhance the central theme of American heritage. Some of these include:

- Avenue of flags - outdoor display of the 56 state territory, commonwealth and district flags
- Evening Lighting Ceremony - a 30 minute ranger presentation that concludes with the illumination of the sculpture
- Presidential walk - a 30 minute ranger led and interpretive walk to the base of the sculpture, and
- exhibits and theatre shows on Mount Rushmore and the four presidents

A second theme around the sculpting of the memorial, is expanded on in talks on the carving process, a sculptors studio with interactive displays on Gutzon Borglum and workers involved in the sculpture, historic film footage, exhibits on the tools used, etc.

Theming of the facilities, attractions and activities is successfully used at Mount Rushmore to bring the visitor experience to life and to enhance the attractions symbolic depiction of American tradition, heritage and culture



Careful consideration should be given to the choice of theme to be applied to an attraction in terms of its relevance, the impact it will have in enhancing the visitor experience and the opportunities for product expansion that it presents.

Conclusion

From the above discussion on the various towns in the Cape Agulhas region, it is clear that significant potential for tourism development exists in the region. Each town has different product strengths that should be capitalised upon in order for the town to optimise its role in the regional tourism space economy. However, successful product and destination development is largely dependant on the facilitating role of public sector to ensure that an environment that is conducive to tourism development is created. This will involve investment in both hard and soft infrastructure as discussed above. More specific issues that need to be addressed relate to accessibility, human resources, information systems and the investment climate. Led by market demand, private sector will then be enticed to drive product and market development.

Proper planning allows for the integrated and coordinated development of tourism, where each town in the region will play a specific role. A complimentary set of products and experiences targeted to specific markets will together form the critical mass to make the region a successful destination offering a comprehensive and integrated tourism experience.

		Napier
Goal	Alignment with objective	Recommendation
Destination experience	1.2	Package low impact ecotourism attractions and activities (i.e. fynbos tours, nature photography, hiking trails, horseback riding, etc.)
	1.4	Expansion cultural/heritage tourism products (i.e. arts and craft shops, cultural festivals, etc.)
	1.2	Develop agritourism products through involving local farming community in tourism (i.e. farm stays, wildflower farming tours, etc.)
	1.5	Implement recommendations of Cape Agulhas SDF
Effective destination marketing	2.1	Investigate potential of Napier to position itself as 'Health, Fitness and Wellness' centre of the Cape Agulhas area
	2.6	Investigate potential of Cape Agulhas region as a 'rural endurance and team sport training base'

6.8 Napier

6.8.1 Significance in the regional tourism space economy

In the regional tourism space economy, the small village of Napier is primarily a destination for cultural heritage tourism. The surrounding natural beauty and commercial farming activities provide opportunity to grow into a destination for ecotourism and agritourism.

6.8.2 Evaluation

Its rural character, warm hospitality, interesting architecture, fascinating history, artistic community and the annual horse and cart festival are all elements that make Napier a unique cultural destination. Significant product and market development is required to reach the critical mass that is needed to extend the length of stay and tourism spend of visitors.

6.8.3 Investment requirements

The primary investment requirements for Napier to allow tourism growth related to capacity building and skills development amongst the local community. The provision of appropriate tourism information and signage are additional investment requirements.

6.8.4 Product and market development requirements

Private sector investment is required in terms of product and market development specifically in the areas of ecotourism and agritourism. Coordinated development of cultural attractions will strengthen the cultural and heritage product offering. In order to build its product base, Napier also needs additional accommodation and food and beverage outlets.

The charming character of Napier lends itself to tourism growth and allows for positioning itself as a quaint countryside retreat.

6.7.4 Product and market development requirements

Cultural/heritage tourism ecotourism and agritourism are the three main areas around which product and market development in Elim should be focussed. The historical and cultural influences that shaped the town and community as it exists today holds significant potential for tourism product development. In addition, the unique natural resources and specialised agricultural activity in and around the town can be capitalised upon to compliment and expand the town's product offering and deliver a comprehensive tourist experience. Potential exists to creatively package these products and link Elim's product offering to that of other mission stations or related destinations through developing themed routes i.e. the mission route, slave route, Fynbos route, etc.

Product and market development through partnerships will have as significant impact on the socio-economic upliftment of Elim. Product and market development is normally driven by private sector. The administrative situation regarding issues such as landownership, etc. in Elim provides an opportunity for private sector to form partnerships with public sector and the community to build a successful tourism destination.

Goal	Alignment with objective	Recommendation
Destination experience	1.2	<ul style="list-style-type: none"> develop agritourism products around the local wild flower drying and packaging industry such as guided tours, visitor participation programmes and souvenir retail.
	1.4	<ul style="list-style-type: none"> upgrading of the slave monument as a cultural tourist attraction and incorporating it with the historic role of the town in the area
	1.2	<ul style="list-style-type: none"> creation of specific ecotourism products such as hiking trails and guided tours showcasing the unique flora of the area
Effective destination marketing	2.2, 2.3	<ul style="list-style-type: none"> innovative product packaging focussing on mission station heritage
Strategic investment	3.1	<ul style="list-style-type: none"> Tarring and general upgrading of gravel roads linking Elim to other centres in the region in order to facilitate easy access to both tourists and general commercial traffic
	3.2	<ul style="list-style-type: none"> improve tourism information systems and provision of appropriate tourism signage
Sustainable future	4.2	<ul style="list-style-type: none"> implementation of capacity building initiatives where members of the community can be educated and trained to work in the tourism industry
Industry development	5.5	<ul style="list-style-type: none"> creating and enabling environment for attracting investment and facilitation of public/private/community partnerships tourism awareness and business development capacity-building programmes

6.7 Elim

6.7.1 Significance in the regional tourism space economy

Its origin as a Moravian mission station makes Elim an important destination for cultural and heritage tourism. It is also a unique destination for ecotourism due to the occurrence of the Elim Fynbos that can only be found here, while commercial drying and packaging of wild flowers for the export market and other farming activity presents opportunity for the town to grow into an agritourism destination.

6.7.2 Evaluation

Elim is a unique town where the church plays a significant role in the lives of the community in terms of land ownership and preserving community values and traditions. Only members of the church may own land and specific construction/architecture guidelines apply in order to maintain the town's unique character. Poor access, low volumes of through traffic and high unemployment has resulted in a generally impoverished community. However, it is possible to alleviate the situation and bring socio-economic growth to Elim through responsible development of the significant tourism potential that exist in the area. Responsible tourism development can build the skills capacity, create jobs and foster civic pride amongst the community of Elim. This process has already started when funding was made available to restore and convert one of the church buildings into a guesthouse. The poor performance of the guesthouse is a good example of the results of poorly planned tourism development. In the case of Elim tourism product development occurred in isolation, without regard for factors such as market access, marketing, accessibility, availability of appropriately skilled human resources, etc. However, within the integrated tourism development plan for the Cape Agulhas region, an opportunity exists for Elim to develop into an important destination and expand its tourism offering significantly.

6.7.3 Investment requirements

As is the case with most of the towns in the region, poor road infrastructure impedes accessibility and subsequently tourism growth. Public sector investment in upgrading road linkages to the town is paramount for the growth of tourism. Other investment requirements include provision of services, tourist information and signage and facilitation of capacity building to ensure the availability of appropriately skilled human resources. Opportunities for public-private-community partnerships exist in this regard.

Suiderstrand		
Goal	Alignment with objective	Recommendation
Destination experience	1.2	<ul style="list-style-type: none"> ▪ development of low impact ecotourism products (i.e. hiking mountain biking, horseback riding, etc.), outdoor adventure and sport products (i.e. diving, fishing, etc.)
Strategic investment	3.1	<ul style="list-style-type: none"> ▪ general upgrading of the access road to Suiderstrand
	3.2	<ul style="list-style-type: none"> ▪ provision of signage
	3.3	<ul style="list-style-type: none"> ▪ accommodation provision in the form of an exclusive lodge or a few bed and breakfast type establishments
Sustainable future	4.3	<ul style="list-style-type: none"> ▪ The development of Suiderstrand should be limited to low impact, small scale primarily due to its location and to preserve its unique character

6.6 Suiderstrand

6.6.1 Significance in the regional tourism space economy

Suiderstrand is a small coastal village a few kilometres west of L'Agulhas and the southern-most point. It is surrounded by the Agulhas National Park and comprises a residential area and a small private nature reserve. In the tourism space economy, Suiderstrand is a destination and is primarily visited by the domestic second homeowners market, but has limited tourism infrastructure. It is also a popular fishing spot for locals and domestic visitors.

6.6.2 Evaluation

As the town does not have electricity connections, it caters for a limited and niche market consisting primarily of holiday homeowners and fishing enthusiasts. Access is possible only by gravel road. Current tourism products offered relate to ecotourism and sport and recreation.

6.6.3 Investment requirements

Upgrading of the gravel access road will be required as well as signage and provision of services such as electricity, water and sewerage.

6.6.4 Product and market development requirements

Potential exist to develop tourism products focussing on niche markets under the ecotourism, adventure tourism and sport and events product categories. Niche market development will be supported by appropriate accommodation provision.

Product and market development requirements

If L'Agulhas is to become the primary destination in the region, it must capitalise on the abundance of available resource to inform product and market development. Based on market requirements, L'Agulhas must build the required critical mass of tourism product to provide a visitor experience that will maximise length of stay and tourism spend. Overall product development must compliment and centre around the southern-most point as the icon attraction. Now is the time to realise the potential that exists for developing new and innovative products based on the geographical extremity of the town's location. In addition, product and market development opportunities exist in accommodation provision, sun, sea and sand tourism, ecotourism, culture and heritage tourism, adventure tourism and retail and entertainment tourism.

Goal	Alignment with objective	L'Agulhas Recommendation
Destination experience	1.1 1.2 1.2	<ul style="list-style-type: none"> implement recommendations regarding key building infrastructure, road infrastructure as per the Spatial Plan for the Southern-most Point develop ecotourism opportunities within the newly proclaimed Agulhas National Park develop adventure tourism focussing on outdoor activities and events such as hiking, mountain biking, responsible quad biking, snorkel and scuba diving, etc.
Effective destination marketing	2.1	<ul style="list-style-type: none"> work with Western Cape Tourism to develop a regional brand with the Southern most point at the core
Strategic investment	3.1 3.2 3.3	<ul style="list-style-type: none"> maintenance of the R319 to facilitate easy access to L'Agulhas and establishment of a road link with the existing coastal route between Cape Town and the Garden Route development and upgrading of tourism information points and signage to attractions develop a variety of accommodation options to meet the market requirements in terms of capacity, standard and quality.
Sustainable future	4.2	<ul style="list-style-type: none"> facilitate capacity building and skills development amongst the local community to ensure an available and appropriately skilled human resource pool
Industry development	5.5 5.4	<ul style="list-style-type: none"> make available suitable land for product development combined with provision of the required services and infrastructure needed to create attractive investment opportunities for private sector facilitate programmes to develop high-quality locally designed and produced merchandise for retailing at Southern most experience

6.5

L'Agulhas

6.5.1

Significance in the regional tourism space economy

In both the regional and national tourism space economy, L'Agulhas is an important destination. Not only for its beaches and natural beauty, but also most importantly for its location at the southern-most tip of the African continent. The town as a destination has suffered from poor accessibility, and has had to contend with the erroneous perception that Cape Point on the Cape Peninsula is the southern-most point. L'Agulhas now has the opportunity to reclaim its rightful position as the destination and town at the tip of Africa.

6.5.2

Evaluation

Uncoordinated product development, poor access and inadequate marketing have led to L'Agulhas becoming just another seaside town. Like Struisbaai, L'Agulhas is a popular destination for holidaymakers and second homeowners during traditional holiday periods in the domestic market. Accommodation provision is therefore basic and affordable comprising of self-catering establishments and camping facilities. A small assortment of guesthouses and bed and breakfast establishments provide more upmarket accommodation. Although tremendous potential exists, tourism products are limited and can broadly be categorised as sun, sea and sand attractions, ecotourism products and culture/heritage tourism. There is a need to expand the product base and build a stronger destination with the southern-most point as an icon attraction. L'Agulhas as the primary destination and the southern-most point as an icon have the potential to draw tourists into the Cape Agulhas region and spur the growth of tourism.

6.5.3

Investment requirements

In the future tourism space economy of the Cape Agulhas region, L'Agulhas will have an important role to play as a honey pot destination, and public sector investment should be directed with this in mind. Facilitating easy access to L'Agulhas is the most important investment requirement. In this regard the quality of the R319 linkage with Bredasdorp should be maintained and strong consideration must be given to the possibility of linking L'Agulhas to the coastal route that currently extend from Cape Town to Die Dam. In addition to improved access, investment in tourism infrastructure (information systems, services, human resource, etc.) is required that will attract private sector investment in product development.

Struisbaai		
Goal	Alignment with objective	Recommendation
Destination experience	1.5	<ul style="list-style-type: none"> ▪ Adopt measures to improve visual appeal of town, e.g. control over outdoor advertising, tree planting and landscaping, planning guidelines and design controls for future residential development
Effective destination marketing	2.2	<ul style="list-style-type: none"> ▪ Capitalise on opportunities in sun, sea and sand tourism, ecotourism and adventure tourism through new and innovative product development in attractions and activities ▪ Consider product packaging options with other destination towns in the region
Strategic investment	3.1	<ul style="list-style-type: none"> ▪ Maintenance of the R319 linking Struisbaai with Bredasdorp
	3.2	<ul style="list-style-type: none"> ▪ Improve signage to attractions
	3.3	<ul style="list-style-type: none"> ▪ Expansion of current accommodation supply in terms of capacity and standard to be in a position to cater for larger groups

6.4 Struisbaai

6.4.1 Significance in the regional tourism space economy

Struisbaai has primarily developed as a sun, sea and sand holiday destination for the domestic market during traditional holiday periods. With growth of the number of second or holiday homes, Struisbaai has developed a limited retail, entertainment, food and beverage and other commercial activity base, serving mainly residents in and visitors to the town and adjacent L'Agulhas. It is also a destination for ecotourism and outdoor activities and may play a distribution point role for visitors exploring the southern-most point and other attractions in the Cape Agulhas area.

6.4.2 Evaluation

Struisbaai predominantly comprises of holiday homes with some accommodation establishments catering for the domestic market. The town's main attraction lies in its beautiful beaches and natural beauty of the surrounding area. Development and upgrading of existing tourism products and the introduction of new products will enhance the attractiveness of the town as a tourism destination. Potential also exists to expand the commercial sector to deal with future demand as tourism grows in Struisbaai, L'Agulhas and the surrounding area.

6.4.3 Investment requirements

Struisbaai primarily requires investment from public sector to facilitate expansion of its tourism product base. In this regard the primary requirement is in the on-going maintenance of the road linkage with Bredasdorp (R319) to make the town accessible to a wider market. Public sector investment for tourism is further required in the provision of services, tourist information and proper signage to attractions in and around Struisbaai, general town beautification and creating a conducive environment for private sector investment. Private sector investment and product development will not be forthcoming if public sector does not show commitment to tourism growth and provide an attractive investment climate.

6.4.4 Product and market development requirements

Due to its location en route and adjacent to L'Agulhas and the southern-most point, we believe that private sector investment in product and market development in Struisbaai should compliment and enhance the offering of the aforementioned. The domestic traditional holiday market will probably remain the primary market for Struisbaai as a destination. However, significant potential exist to gain market share in the growing international market as tourists have to pass through Struisbaai to reach L'Agulhas and the southern-most tip of Africa. Struisbaai is in a position to capitalise on its location en-route to L'Agulhas and the southern-most tip by showcasing its product offering and compete for valuable tourism spend. Opportunities exist for product and market development in the areas of sea, sun and sand tourism, ecotourism, adventure tourism and retail and entertainment. By focusing product development in Struisbaai to compliment the product offering in L'Agulhas and at the southern-most point, both towns can share in the benefits gleaned from offering a more integrated experience to tourists.

Arniston/Waenhuiskrans		
Goal	Alignment with objective	Recommendation
Destination experience	1.2	<ul style="list-style-type: none"> capitalise on existing potential by developing new markets and products for ecotourism attractions, outdoor adventure activities
	1.5	<ul style="list-style-type: none"> implement recommendations of Arniston SDF to enhance attractiveness of culture and heritage attractions
Effective destination marketing	2.4	<ul style="list-style-type: none"> develop the MICE market and encourage product development in this regard – e.g. incentive groups, meeting and training groups, etc.
Strategic investment	3.1	<ul style="list-style-type: none"> maintenance of the R316 as primary access route to facilitate easy access, and to attract tour groups and other future markets. Consideration should also be given to the possibility of creating of linkages with L'Agulhas/ Struisbaai and the possible link-up of these towns with the coastal route originating in Cape Town
	3.2	<ul style="list-style-type: none"> develop spatial and investment plan for the upgrading and development of Arniston harbour in order to improve working conditions for local fishing community and facilitate opportunities for adventure tourism product development
Sustainable future	4.2	<ul style="list-style-type: none"> support current private sector initiatives to accelerate skills development and capacity building that will empower previously disadvantaged communities
Industry development	5.4	<ul style="list-style-type: none"> increase retail, food and beverage and entertainment opportunities - e.g. local arts, craft shops, restaurants, etc.

6.3

Arniston/Waenhuiskrans

6.3.1 Significance in the tourism space economy

The quaint fishing village of Arniston/Waenhuiskrans has grown from a seaside hideaway for second homeowners and the domestic market during traditional holiday periods into a destination for the international FIT and domestic weekend break markets. It is also a popular destination for ecotourism/outdoor adventure activities and cultural and heritage attractions. In addition to its role as a destination, Arniston/Waenhuiskrans also functions as a base or distribution point for tourists exploring the region.

6.3.2

Evaluation

Despite its relatively limited accommodation capacity, Arniston/ Waenhuiskrans offers a high quality of tourism products and services. The product base is still relatively small and there is significant room for expansion and development in order to achieve the critical mass required to ensure sustainable future growth. Strong partnerships between private sector stakeholders and local communities are ongoing and have been very successful to date. Accessibility however, remains a hampering factor for tourism growth.

6.3.3

Investment requirements

Alleviating poor accessibility is a primary concern in unlocking Arniston/Waenhuiskrans' full tourism potential. Once this obstacle has been overcome there will be a requirement for additional infrastructural investments in terms of service provision, signage and capacity building in order to attract the private sector investment required for sustainable growth. Public sector investment will also facilitate required expansion of commercial activity and job creation.

6.3.4

Product development and marketing requirements

Although a requirement exist for expanding sun, sea, and sand related products, more significant potential lies in the development of ecotourism, cultural/heritage tourism and outdoor adventure products. This will lead to a requirement for expansion of accommodation supply and create opportunities for product development relating to food and beverage and entertainment facilities. There may also be a future requirement to develop the MICE product dependant on future plans for OTR (Overberg Test Range) facilities outside Arniston/ Waenhuiskrans. Marketing of the area's product offering must be specifically targeted to attract the markets that will be responsible for sustainable growth of tourism in Arniston/Waenhuiskrans.

Bredasdorp		
Goal	Alignment with objective	Recommendation
Destination experience	1.4	<ul style="list-style-type: none"> increase retail and entertainment opportunities - e.g. local arts, craft and curio shops showcase the town's unique history and heritage – e.g. promote events, museums, heritage buildings and local culture and traditions
Effective destination marketing	2.2	<ul style="list-style-type: none"> capitalise on agritourism opportunities – e.g. combine leisure activities with participation programmes on a working farm
	2.4	<ul style="list-style-type: none"> make available conference and meeting venues to stimulate growth of MICE – e.g. hosting regional/industry focussed conferences and meetings
Strategic investment	3.1	<ul style="list-style-type: none"> improvement to information provision systems such as tourism signage and tourist-friendly information points
	3.2	<ul style="list-style-type: none"> on-going maintenance of road linkages to coastal destinations, (the R319 to Struisbaai/ L'Agulhas and the R316 to Arniston/ Waenhuiskrans) in order to improve ease of access and safe distribution of tourists
	3.3	<ul style="list-style-type: none"> expansion of accommodation provision
Sustainable future	4.1, 4.2 4.2, 4.3	<ul style="list-style-type: none"> establish community-based 'ryndos garden' pilot project offer seminars to prospective entrepreneurs- focussing on project proposals, business plan development, funding sources, partnership formation, marketing

6.2 Bredasdorp

6.2.1 Significance in the regional tourism space economy

Bredasdorp is the largest town in the area and serves as the administrative centre for the regional municipality, and the main commercial centre for the region's farming and rural population. In the regional tourism space economy, Bredasdorp is primarily a staging post for tourists travelling between Cape Town and the Garden Route and other destinations in the area. In addition, it also fulfils a distribution point role for the coastal destinations in the Cape Agulhas region and to a lesser extent functions as a destination in its own right. The town will continue to play a strategic support role in the region's tourism growth, particularly in terms of distributing supplies and tourists throughout the region.

6.2.2 Evaluation

Bredasdorp's location in terms of the road network in the Overberg, emphasise its role as a staging post and distribution point for destinations in the Cape Agulhas region. In this regard, existing local government and private sector support for tourism bodes well for the future growth and development of tourism in the entire Cape Agulhas region. In addition, significant potential for tourism exists in and around Bredasdorp in terms of its natural, historical and cultural resources. Innovative utilisation and packaging of these resources offer opportunities for product development in order to strengthen its position as a destination. There are, however a number of issues around availability of funding, infrastructure linkages, information provision, availability of appropriately skilled human resources, etc. that still need to be addressed if the tourism growth potential of Bredasdorp is to be realised.

6.2.3 Investment requirements

Public sector investment required for Bredasdorp would primarily include general upgrading of roads and linkages with coastal towns, improved information provision and capacity building. Once these public sector investments are made in and around Bredasdorp, it will be easier to attract private sector investment in product development and service delivery to the town as well as to the Cape Agulhas region in general.

6.2.4 Product and market development requirements

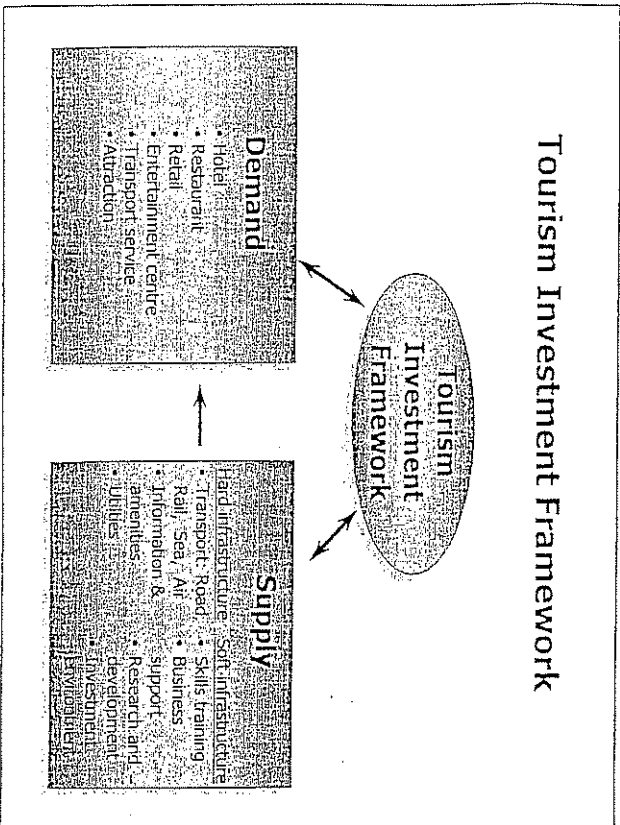
Focus must be placed on strengthening Bredasdorp's role as a staging post and distribution point for the region. Although development requirements for Bredasdorp must be more concentrated around tourism infrastructure provision to improve access to, and direct visitor flows through the entire Cape Agulhas region, there are also specific product development requirements in order to enhance Bredasdorp's role as a destination. Opportunities for product and market development exist in the areas of agritourism, cultural and heritage tourism, and retail and entertainment products. To strengthen Bredasdorp's role as a distribution point it will be necessary to expand the towns accommodation supply as well as build its general commercial, trade and investment capacity.

ris approach shows support and enables private sector to identify synergies, limit risk due to clustering and achievement of critical mass and open discussion on marketing opportunities and linkages. Linkages between complimentary products are fundamental to growth. The application of TIF to investment opportunities is critical both to credibility and to delivery. If investment opportunities are not identified then TIF will be in danger of being labelled another "talk shop". This must be avoided at all costs.

The TIF provides recommendations and direction for investment requirements. Guidance regarding the potential and interventions required at specific locations are detailed in the final section of the report. It now becomes a matter of prioritisation and focus. Investment requirements for the southern-most point for example should be given top priority. Using TIF and the Tourism Spatial Framework assessment as a base, the Cape Agulhas Municipality can communicate the rationale for specific projects to the relevant delivery department or agency. The projects are therefore placed in the pipeline and will be assessed according to defined criteria.

The investment requirements identified in the Tourism Development Framework are primarily supply side measures. By investing in the supply side, it is possible to achieve future leverage of private sector investment. Synergies at a supply level could also result in public and private sector partnerships. Figure 5.2 illustrates the approach.

Figure 5.2 Tourism Investment Framework links supply and demand



Answering the question of what difference an investment will make has been the main basis for our recommendations. Ultimately, the success of delivery for recommendations made on investment opportunities will be dependant on communication, structured decision making, clear definition of responsibilities and the commitment and level of engagement from stakeholders.

6 CAPE AGULHAS REGIONAL TOURISM DEVELOPMENT AND INVESTMENT FRAMEWORK

6.1 Introduction

The regional framework examines each town in the Cape Agulhas region and applies the principles of establishing a tourism development and investment framework as discussed previously to each area. Specific investment, product development and marketing requirements are discussed for each town and key recommendations aligned to the goals and objectives are made.