Modimolle Municipality

Tourism Strategy and implementation Plan

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1. Scope of Work.

It has been agreed that the following objectives will form the framework for the strategy:

1.1 Investigate International, National and Provincial trends that will dictate the development of a Tourism strategy for the Modimolle Municipality.
   - To analyze international tourism trends
   - To analyze national tourism trends
   - To analyze tourism trends to the Limpopo Province
   - To analyze tourism trends to Modimolle

1.2 Audit of the status quo in the Modimolle Municipal area.
   - Supply Side Analysis
     The supply side analysis includes all aspects than can host tourists in an area. Therefore it includes accommodation, restaurants facilities, tourist’s attractions and the number of tour operators.
     - The main tourist attractions
     - Profile of tourists currently travelling to Modimolle

1.3 Tourism Potential and Expansion.
   - Trends
   - Identify tourism potential of Modimolle

1.4 Identify bankable tourism projects
   Investigate opportunities for:
   - Agri-tourism
   - Eco-tourism
   - Resort & Overnight development (short & long stay)
1.5 Tourism Marketing and Networking plan

Focus will be placed on the following areas:

- Provincial Development and Growth Strategy
- Strengths
- Weaknesses
- Opportunities
- Threats
- Key Role Players
- BEE Participation

1.6 Tourism Implementation Plan

To include the identification of the strategy but does not include detailed business plans for the various identified projects.

  Structure / Role players to implement strategy
  - Prioritization of projects
  - Targets
  - Costing & Budgets
  - Timelines
2. Methodology

2.1 Research

The research phase involved a situation analysis and a benchmarking / competitive analysis. The Situation Analysis involved an assessment of existing information as well as some primary research to supplement the existing information.

During Phase 1 we:

- Met with the client and stakeholders to:
  - Ascertain the scope, constraints and peculiarities of the project;
  - Define the study area of the project;
  - Assess the context and background of the project; and
  - Gain a full understanding and agree on the expected outputs of the assignment.

- Visited the study area to obtain a broad understanding of:
  - The range and standard of tourism facilities in the area, and
  - The overall tourism appeal of the area, including natural, cultural, historical, geological sites and features, etc.

Assessment of existing Information

The team has reviewed and assessed relevant existing studies, plans, strategies and initiatives that might have an influence on the development of a tourism strategy for Modimolle municipal area as a destination. This included:

- The Limpopo Provincial Growth and Development Strategy (PGDS) that set a framework for growth and development and established a vision to make Limpopo a major contributor to national GDP by 2020. The PGDS addresses critical development issues such as economic growth per sector, employment creation, poverty eradication, etc. The PGDS sets out a comprehensive
strategy for amongst others, sustainable rural development, spatial development, spatial development, SMME development, etc.

- the Modimolle IDP and the Communication and Marketing Plan for Modimolle
- A Tourism Growth Strategy for Limpopo Province by the Department of Economic Development and Environment, as well as other studies that may have been conducted for the study area or other similar / comparable areas.
- National and provincial legislation in respect of tourism, as well as marketing strategies, and other relevant studies;
- Cluster strategies of Limpopo Province within which the tourism industry operates, to be able to determine the impact of the industry on the economy as a whole;
- Provincial planning documents to understand the position of each tourism cluster within these documents and how the study area will develop in terms of commercial, residential, industrial, agricultural etc.

The research collection was done by the University of Pretoria: Tourism Department according to the situation analysis framework, i.e.

- Analysis of Current and Future Tourism Demand
- Analysis of Current and Future Tourism Supply
- Analysis of Supportive Aspects
  - Infrastructure
  - Marketing
  - Human Resources and Involvement of BEE
  - Information Resources
  - Institutional Aspects
  - Investment Aspects

2.2 Analysis of Current and Future Tourism Demand

The Team:

- Analysed the flow of tourists in South Africa and Limpopo in particular, as well as products currently incorporated into the itineraries of tour operators.
- Specifically investigated:
  - The flow of tourists through Limpopo;
The key places of interest for visitors to each tourism cluster;

- The criteria they or their clients use to choose such a visit;
- The average size of a group, and
- The frequency of trips

Conducted interviews with a sample of current tourism product owners in the study area to determine current levels of operation, occupancies, length of stay, growth trends, forward bookings, etc.

- Interviewed representatives from tourism organizations within the study area;
- Assessed the size of the tourism industry in Limpopo and potential growth of tourism in the study area, as well as the potential economic benefits of developing an integrated industry in the area with active participation of the private sector.
- Reviewed the available demographic statistics of Limpopo and South Africa as well as the research and statistics available on the leisure habits of the local population, in order to determine domestic tourism patterns;
- Reviewed available statistics and other pertinent data from studies on the region undertaken in order to ascertain the trends in the tourism industry in Limpopo, as well as in respect of the study area;

2.3 Review and Analysis of Current and Future Supply

The Team:

- Interviewed government authorities, tourism industry leaders, developers and others whom we considered appropriate (i.e. LTPB, Dept. of Economic Development, TIL) to define / reassess the likely future supply of tourism products.
- Studied information contained in research documentation, i.e. Local Economic Development Strategy, Modimolle Integrated Development Plan, Communication, Marketing and Investment Strategy for Modimolle Municipality, in order to understand community needs that must be addressed
- Conducted an investigation – through interviews with certain current product owners and reviewed current promotional material of existing tourism

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products, such as accommodation establishments, attractions, conference and function venues, and events to determine:

- Visitor numbers;
- Trends in size;
- Market mix and guest characteristics;
- Rates;
- Seasonality;
- Occupants / patronage;
- Facilities provided; and
- Linkages and flows.

- Assessed whether the municipal area has any unique elements, attractions or features, such as natural features, historical, cultural or heritage sites, etc. that have potential (undeveloped) to become tourist attractions, and whether there are any existing or potential unique elements, attractions or features such as natural features, cultural / historical elements, annual shows, events, etc. which could be linked to the attraction of niche markets.

### 2.4 Gap Analysis

Based on the supply and demand assessments the team:

- Carried out a critical analysis of current tourism product supply in the study area and how this relates to product demand;
- Highlighted the gaps between current tourism product supply and demand and future product supply and demand.
- Specified tourism products in the study area that have significant demand potential and require further development.
2.5 Analysis of Supportive Aspects

Infrastructure:

- Determined the current level of basic infrastructure (such as roads, telecommunication, water, electricity, etc.) supporting the tourism resource base.
- Determined the current level of soft infrastructure supporting the tourism industry, i.e. municipality, community associations, publicity associations, training providers, etc.
- Determined the current level of suppliers supporting the tourism industry, i.e. food and beverage suppliers, construction companies, security services, cleaning services, etc.

Marketing

The Team:

- Assessed the current tourism information system by:
  - Reviewing current information distribution channels such as internet websites, relationships with tour operators, attendance of tourism trade shows, etc;
  - Reviewed current promotional material, such as brochures, advertising, etc.
  - Interviewed current information office staff.

The above was done in order to determine the nature and effectiveness of current distribution and promotional channels.

- Interviewed persons involved in tourism marketing and also obtained information on product owners’ marketing; and
- Reviewed the brochures of inbound tour operators to assess packages available to Limpopo.

Human Resource and Involvement of PDI’s

The Team:
• Estimated the number of people currently employed in the tourism industry in the area (both in government and the private sector);
• Assessed the current training infrastructure such as training institutions, training programmes, etc. (skills base)
• Assessed the number of business owned by PDI’s in the industry in the study area, that could potentially emerge and their ability to cope with the projected increase in demand.

Institutional Aspects

The Team:
• Reviewed the existing tourism structures at national, provincial and local level.
• Developed a proposal for coordinating and managing the tourism strategy, with respect to roles and responsibilities, budgets, capacity, marketing and development.

Potential tourism development projects

The Team:
• Reviewed opportunities for new projects that will be sustainable over the long term.
Since 2000 the international tourism industry has, first and foremost, been dominated and influenced by the combination of an overall weak economy and a high level of uncertainty because of the struggle against terrorism and the looming Iraq conflict. The global economic downturn following the boom and bubble of the late nineties put pressure on expenditure resulting in an increased price sensitivity in general and cost cutting on business travel in particular (less and cheaper). The terrorist attacks of 11 September 2001 added a huge amount of uncertainty to this already difficult climate. This trend has however benefited the South African tourism industry quite significantly. The subsequent war on terrorism and the tension resulting from the threat of an intervention in Iraq prolonged this uncertainty even more (WTO, 2003b:2).

For tourism these abrupt changes of conditions resulted not so much in a decrease in overall volume but, above all, shifts in demand towards trips to familiar destinations closer to home, by car, coach or train instead of plane. Consumers adopted a wait-and-see attitude, with late bookings as a result. Many sectors went and are still going through a difficult time, in particular airlines and all sectors dependent on long-haul traffic. Other products or segments of the market, however, have resisted well or even benefited, such as accommodation other than hotels (apartments, country houses, etc), special interest trips with a high motivation factor related to culture, sports, entertainment, or travel for the purpose of visiting family, friend and relatives (VFR) (WTO, 2003b:2).

This climate has also accelerated a number of changes that were already underway. Low-cost airlines kept on growing in North America, and have developed rapidly in Europe. The Internet has strengthened its role as a means of information and marketing (WTO, 2003b:2). When we look at Africa it shows that African countries that reported data for the corresponding months, increased in January and February, and decreased in March. South Africa maintained the good pulse shown in 2002 (+11%), with an increase of 9% in January 2003 and 7% in February 2003. Even during the month of March 2003,
when most destinations around the world showed declines as a result of the geo-political tension, South Africa only saw a slight decrease of 0.3% (WTO, 2003b:6)

Table 1: International Tourist Arrivals by country of destination

<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>Africa</td>
<td>TF</td>
<td>TF</td>
<td>156</td>
<td>5.4</td>
<td>16.4</td>
<td>26.6</td>
<td>4.4</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>TF</td>
<td>TF(2)</td>
<td>838</td>
<td>-0.4</td>
<td>24.3</td>
<td>24.3</td>
<td></td>
</tr>
<tr>
<td>Kenya</td>
<td>TF</td>
<td>TF</td>
<td>681</td>
<td>3.1</td>
<td>-0.1</td>
<td>1.9</td>
<td>6.1</td>
</tr>
<tr>
<td>Mauritius</td>
<td>TF</td>
<td>TF</td>
<td>4 193</td>
<td>-0.7</td>
<td>2.5</td>
<td>18.6</td>
<td>2.8</td>
</tr>
<tr>
<td>Morocco</td>
<td>VF</td>
<td>VF</td>
<td>6 550</td>
<td>10.9</td>
<td>5.0</td>
<td>8.7</td>
<td>6.8</td>
</tr>
<tr>
<td>South Africa</td>
<td>TF</td>
<td>TF</td>
<td>5 064</td>
<td>-6.0</td>
<td>-8.3</td>
<td>5.3</td>
<td>0.9</td>
</tr>
<tr>
<td>Tunisia</td>
<td>TF</td>
<td>VF</td>
<td>4 906</td>
<td>12.6</td>
<td>4.3</td>
<td>64.3</td>
<td>21.7</td>
</tr>
<tr>
<td>Middle East</td>
<td>TF</td>
<td>TF</td>
<td>1 622</td>
<td>9.7</td>
<td>-8.0</td>
<td>17.5</td>
<td>6.5</td>
</tr>
<tr>
<td>Egypt</td>
<td>TF</td>
<td>VF air</td>
<td>956</td>
<td>14.2</td>
<td>11.6</td>
<td>20.4</td>
<td>5.2</td>
</tr>
<tr>
<td>Jordan</td>
<td>TF</td>
<td>VF air</td>
<td></td>
<td></td>
<td>1.9</td>
<td>17.4</td>
<td>7.9</td>
</tr>
<tr>
<td>Lebanon</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Qatar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>31.8</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>15.8</td>
</tr>
</tbody>
</table>

(Source: (WTO, 2003b:6).

1. Year to date
2. Tourist arrivals in the International Airports of Jomo Kenyatta, Mobassa and Moi, as well as Cruise Ships

As a region, Africa performed comparatively well during the last few years and seems to be influenced more by its own immediate problems than by the geo-political ones. Some
of the African destinations emerged as a safe destination, most importantly South Africa. Of the major tourist destinations, it is anticipated that the North African destinations, Tunisia and Morocco will regain momentum in the more relaxed climate. The renewed growth of South Africa is expected to continue for some time, although the appreciation of the South African Rand might slow down the pace (WTO, 2003a).

The substantial growth of tourism activity clearly marks tourism as one of the most remarkable economic and social phenomena of the past century. The number of international arrivals shows an evolution from a mere 25 million international arrivals in 1950 to the 699 million of 2000, corresponding to an average annual growth rate of 7 per cent. In the same period, international tourism receipts, at current prices and excluding international transport costs, had an average annual growth rate of 11 per cent (WTO, 2003a).

Modern tourism is characterised by strong overall development and by a growing tendency for tourists to visit new destinations, together with tourism product diversification and increasing competition between destinations. New destinations are steadily increasing their market share. By region, this growing dispersion of tourists is illustrated by above-average growth in the number of international tourist arrivals in East Asia and the Pacific, South Asia, Africa and the Middle East and by the below-average growth of the more traditional tourist-receiving regions of Europe and the Americas (WTO, 2003a).
Europe and the Americas are still the main tourist-receiving regions. From 1950 to 2000, international tourist arrivals in these two regions grew at an average annual growth rate of 6.6 and 5.9 per cent respectively. In absolute terms, they registered additional 387 million and 122 million arrivals with respect to the number registered in 1950. East Asia and the Pacific is the region which has most benefited from this transformation of the market. Historic series show that this region experienced the highest growth rate (WTO, 2003a).

WTO’s Tourism 2020 vision forecasts that international arrivals are expected to reach over 1.56 billion by the year 2020. Of these worldwide arrivals in 2020, 1.18 billion will be intra-regional and 0.38 billion will be long-haul travellers.
The total tourist arrivals by region shows that by 2020 the top three receiving regions will be Europe (717 million tourists), East Asia and the Pacific (397 million) and Americas (282 million), followed by Africa, the Middle East and South Asia. East Asia and the Pacific, South Asia, the Middle East and Africa are forecasted to record growth at rates of over 5 percent per year, compared to the world average of 4.1 per cent. The more mature regions Europe and Americas are anticipated to show lower than average growth rates. Europe will maintain the highest share of world arrivals, although there will be a decline from 60 per cent in 1995 to 46 per cent in 2020. By 2010 the Americas will lose its number two position to the East Asia and the Pacific region, which will receive 25 per cent of world arrivals in 2020 with the Americas decreasing from 19 per cent in 1995 to 18 per cent in 2020 (WTO, 2003a).

Long-haul travel worldwide will grow faster, at 5.4 per cent per year over the period 1995-2020, than intra-regional travel, at 3.8 per cent. Consequently the ratio between intra-regional and long haul travel will shift from around 82:18 in 1995 to close to 76:24 in 2020. In economic terms, international tourism receipts are classified as exports and international tourism expenditure as imports. For many countries, international tourism is an indispensable source of foreign-currency earnings (WTO, 2003a).
TABLE 2: FORECAST OF INBOUND TOURISM, WORLD BY REGIONS – INTERNATIONAL TOURIST ARRIVALS BY TOURIST RECEIVING REGION (MILLION)

WTO Tourism 2020 Vision: Forecast of Inbound Tourism, World by Regions
International Tourist Arrivals by Tourist Receiving Region (million)

<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>565.4</td>
<td>1,406.4</td>
<td>1,501.1</td>
<td>4.1</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>Africa</td>
<td>20.2</td>
<td>47.0</td>
<td>77.3</td>
<td>6.6</td>
<td>3.6</td>
<td>5.0</td>
</tr>
<tr>
<td>Americas</td>
<td>108.9</td>
<td>190.4</td>
<td>242.3</td>
<td>3.9</td>
<td>19.3</td>
<td>18.1</td>
</tr>
<tr>
<td>East Asia and the Pacific</td>
<td>81.4</td>
<td>196.2</td>
<td>397.2</td>
<td>6.5</td>
<td>14.4</td>
<td>25.4</td>
</tr>
<tr>
<td>Europe</td>
<td>338.4</td>
<td>527.3</td>
<td>717.0</td>
<td>3.0</td>
<td>55.8</td>
<td>45.9</td>
</tr>
<tr>
<td>Middle East</td>
<td>12.4</td>
<td>35.9</td>
<td>68.5</td>
<td>7.1</td>
<td>2.2</td>
<td>4.4</td>
</tr>
<tr>
<td>South Asia</td>
<td>4.2</td>
<td>10.6</td>
<td>18.8</td>
<td>6.2</td>
<td>0.7</td>
<td>1.2</td>
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<tr>
<td>Intra-regional (a)</td>
<td>466.1</td>
<td>790.9</td>
<td>1,143.3</td>
<td>3.8</td>
<td>82.1</td>
<td>75.5</td>
</tr>
<tr>
<td>Long-Haul (b)</td>
<td>101.3</td>
<td>215.5</td>
<td>377.9</td>
<td>5.4</td>
<td>17.9</td>
<td>24.2</td>
</tr>
</tbody>
</table>


Notes:
(a) Intra-regional includes arrivals where country of origin is not specified
(b) Long-Haul is defined as everything except intra-regional travel

(WTO, 2003a).

INTERNATIONAL TOURISM TRENDS

- International tourists spent an average of R12 000 per person per visit excluding airfare and accommodation and stay an average of 10-14 days.
- International travel trends have changed to shorter but more holidays.
- New tourism concepts and product lines such as ecotourism, adventure, and nature-based tourism are impacting greatly on international travel trends.
- Tourism to Africa shows a steady increase.
- Tourism to South Africa is experiencing significant growth.
- Tourists come to South Africa to experience nature-based eco tourism products as well as our good climate.
- South Africa’s top international markets (excluding tourists from Africa) are UK, Germany, USA, France, Netherlands and Italy.
- South Africa is playing a more and more important role in stabilising tourism in the SADC region.
• Crime is not seen to be South Africa’s major drawback as in the past; in fact the country is seen as a safer destination than during the past five years.

• International tourists are looking for new products/destinations.

• The East and Africa are expected to show significant growth up to 2020, according to WTO forecasts. North-south flows indicate a movement from Asia towards the South East Asian countries (ASEAN) and from Europe towards the Middle East and the north and the south of Africa.

• The increasing affordability of travel and the changing preferences of the consumer have seen a shift in travel patterns from the east-west flows to north-west flows.

• In general, based on current trends, developing countries are receiving an increasing share of international tourists as they improve transportation access, develop tourist attractions, facilities and services and become known as a desirable tourist destination.

• Another fundamental trend internationally is for the commercial facilities and services of tourism to be provided by the private sector, but the government at all levels to be responsible for the overall management of tourism so that it meets national, regional, community, environmental and socio-economic objectives.

• Although international leisure tourism remains focussed on traditional beach holidays, the future growth is expected to be on eco-tourism, cultural tourism, adventure tourism and thematic tourism.
4. SOUTH AFRICA AS A GLOBAL TOURISM DESTINATION

Three prime factors determine the success of any geographical area as a tourism destination. They are attractions, amenities and accessibility, which are sometimes called tourism qualities of the destination (Du Plessis, 2002).

Foreign tourism to South Africa has increased by more than 10 percent per annum since 1988 where as world-wide tourism grew by only 2,4 percent, making South Africa one of the world’s fastest growing tourism destinations. Still, the tourism sector only contributes 4,6 percent to the South African Gross Domestic Product (GDP), compared to 10 percent and more to the economies of the United States and countries in Europe (Du Plessis, 2002).

**Figure 3: International tourism arrivals in South Africa: 1987-1999**
(Source - South African Tourism, 2001)
Figure 3 indicates how tourist arrivals have increased since 1987. A high growth in tourism arrivals is evident for the period 1991 to 1996, with a small decrease in growth in arrivals since 1997. This high growth is known in the industry as the “Mandela bump”. It is also evident that South Africa’s main tourism market is Africa, especially neighbouring countries that tend to visit friends and family regularly, and often come to South Africa for shopping purposes (Du Plessis, 2002).

South Africa's main tourism market source, in respect of the overseas markets, is Europe, especially Germany (205 955 tourists in 1999) and the UK (334 226 tourists), followed by the Netherlands (85 586 tourists) and France (84 460 tourists). USA (North America) is also classified as one of the main tourism markets with 166 236 American tourists visiting South Africa in 1999 (Figure 4).

![Figure 4: Breakdown of overseas tourism markets (1999)](https://example.com/figure4.png)

(Source - South African Tourism, 2001)
The dispersed nature of activity and income complicates the task of collecting relevant information on the amount and pattern of spending by tourists (Du Plessis, 2002; WTO, 1999), but it is estimated that the average tourist spent approximately R12 000 on a trip to South Africa during 2001, excluding airfare (South African Tourism, 2001) and stayed approximately 14 nights in the country (South African Tourism, 2002). The attributes most liked about South Africa remain the scenery and wildlife, while crime, infrastructure and service in South Africa remain disappointments to tourists (SATOUR, 1999).

Table 4 shows the profile of tourists from the top 6 markets to South Africa. The important finding here is that all these tourists have one thing in common and that is nature and scenic beauty. The implication of the above is that nature-based attractions are what these tourists want to experience.

**TABLE 4: MARKET PROFILE OF THE TOP 5 MARKETS TO SOUTH AFRICA**

<table>
<thead>
<tr>
<th>MARKET</th>
<th>REASONS FOR VISITING SA</th>
<th>SPENDING PATTERNS</th>
<th>LENGTH OF STAY</th>
<th>CHANNEL</th>
<th>EDUCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. United Kingdom</td>
<td>Climate, scenic beauty, value for money, wildlife, historic sites, authentic travel experiences</td>
<td>€ 2,657 – € 3,326</td>
<td>11-22 Days</td>
<td>Travel agents</td>
<td>Professionals Middle managers Retired</td>
</tr>
<tr>
<td>2. Germany</td>
<td>Scenic beauty,</td>
<td>€ 3,534 – € 5,233</td>
<td>10-16 Days</td>
<td>Brochures and adverts</td>
<td>Middle to upper</td>
</tr>
<tr>
<td>No.</td>
<td>Country</td>
<td>Destination Description</td>
<td>Cost</td>
<td>Duration</td>
<td>Marketing Strategies</td>
</tr>
<tr>
<td>-----</td>
<td>-----------------</td>
<td>----------------------------------------------------------------------------------------</td>
<td>---------------</td>
<td>-------------</td>
<td>--------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>3</td>
<td>USA</td>
<td>Safari, Natural beauty, Culture, Food, Relaxation, General Holiday</td>
<td>$2000 per person, per trip (average)</td>
<td>Less than 2 weeks</td>
<td>Internet</td>
</tr>
<tr>
<td>4</td>
<td>Netherlands</td>
<td>Wildlife, Culture and Scenic Beauty</td>
<td>€ 4,167</td>
<td>19 Days</td>
<td>Friends, Relatives, Brochures, Previous experiences</td>
</tr>
<tr>
<td>5</td>
<td>France</td>
<td>Culture, History, Nature reserves, Political changes in South Africa, Museums</td>
<td>€ 5,534</td>
<td>10 - 24 Days</td>
<td>Brochures, video’s and media adverts</td>
</tr>
<tr>
<td>6</td>
<td>Italy</td>
<td>Culture, History, Nature reserves, Backpacking</td>
<td>€ 3,410 - € 5,093</td>
<td>10 - 15 Days</td>
<td>External media, brochures and media adverts</td>
</tr>
</tbody>
</table>
(Source: SA Tourism, 2002)

SOUTH AFRICA’S ATTRACTIONS AND STRENGTHS

- Nelson Mandela. (SA no. 1 icon)
- All year round good climate.
- Abundance of African wildlife.
- Scenic beauty in different diversities.
- Diverse cultures and lifestyles.
- Contemporary history, historical events, dark tourism (Anglo-Boer War).
- Unspoilt wilderness areas, wildlife and game parks.
- Great variety of special interest attractions such as adventure activities, whale watching, battlefields, wine lands and winemaking, Fauna and Flora, bird-watching, deep sea fishing, diving, unique archaeological and palaeotogical sites and steam trains.
- Special icons, such as Table Mountain, Robben Island – Nelson Mandela, Kruger National Park, Cape Point, Sun City and Lost City just to name a few.
- Good value for money as a destination, South Africa is affordable.
- First world infrastructure.
- Minimal time change from Europe.

The following broad trends appeared to be prevalent with the South African context, as stated by Heath, (2002), which could have implications for the tourism industry:

- An increase in disposable income and propensity to travel on the part of the previous disadvantaged communities.
- Increased awareness of tourism as a major factor in economic development.
- Increasing privatisation of government controlled enterprises.
- Increasing rationalisation regarding infrastructure. This could result in better utilisation of existing facilities.
- Growth in accommodation facilities coupled to increased diversity in standards and facilities.
• Escalating fuel prices (which affect travel and transport costs)
• Currency revaluations which impact significantly on the destination’s competitive position
• An increased pressure on the infrastructure and facilities in certain popular tourism areas, particularly during peak tourism periods.
• Leading African business and diplomatic role.
• Developed, sophisticated and diverse economy.
• Excellent conference venue infrastructure.
• Retail shopping and medical facilities.
• Good beach products – major attraction for the market.
• South African festivals.

The dominant strength is scenic beauty, followed by African wildlife and diversity of the country and the people. Climate and good value for money are also ranked to be important strengths.
5. Strengths and Weaknesses

The following table summarises how South Africa fares in relation to World Class trends and features in terms of strengths and weaknesses (challenges).

<table>
<thead>
<tr>
<th>WORLD CLASS FEATURES</th>
<th>SOUTH AFRICAN FEATURES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique climatic, geographic, cultural or historical attributes</td>
<td>South Africa is World Class:</td>
</tr>
<tr>
<td></td>
<td>- Unique scenery, Environments and Ecosystems</td>
</tr>
<tr>
<td></td>
<td>- Unique culture and history</td>
</tr>
<tr>
<td></td>
<td>- World Heritage Sites</td>
</tr>
<tr>
<td></td>
<td>- World Famous Landmarks</td>
</tr>
<tr>
<td>Accessible by large, wealthy populations</td>
<td>South Africa is potentially World Class:</td>
</tr>
<tr>
<td></td>
<td>- Strong international transportation and gateways</td>
</tr>
<tr>
<td></td>
<td>- Distance a current barrier to long-hauls</td>
</tr>
<tr>
<td>A critical mass of interrelated supporting industries and infrastructure:</td>
<td>South Africa is expanding:</td>
</tr>
<tr>
<td>- Accommodation</td>
<td>- 10,341 new beds: 38% growth since 1993</td>
</tr>
<tr>
<td>- Transportation</td>
<td>- Declining occupancy rates</td>
</tr>
<tr>
<td>- Restaurants</td>
<td>- 300 private game lodges</td>
</tr>
<tr>
<td>- Entertainment</td>
<td>- Guesthouses, B&amp;B’s hostels, self catering holiday resorts are growing</td>
</tr>
<tr>
<td>- Travel agencies and tour operators</td>
<td>- Deregulation of airlines has lowered price</td>
</tr>
<tr>
<td>- Cleaning, services and repair industries</td>
<td>- Competition in car hire has improved service levels</td>
</tr>
<tr>
<td>- Management and development services</td>
<td>- Coach service is increasing in importance for new destinations and emerging markets</td>
</tr>
<tr>
<td>- Security, banking, communications and postal services</td>
<td>- Number of tour operators increasing although there is a need for</td>
</tr>
<tr>
<td>- Other supplier industries</td>
<td></td>
</tr>
<tr>
<td>Specialisation</td>
<td></td>
</tr>
<tr>
<td>---------------</td>
<td>---</td>
</tr>
<tr>
<td>High degree of competition between travel agents</td>
<td></td>
</tr>
<tr>
<td>Packaging of tourism components are generally lacking</td>
<td></td>
</tr>
<tr>
<td>South Africa lags behind in service excellence</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Excellent basic services and infrastructure</th>
<th>South Africa faces challenges:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Services limited to high-end travellers</td>
</tr>
<tr>
<td></td>
<td>Five Star services compare unfavourably with world standard.</td>
</tr>
<tr>
<td></td>
<td>Strong but regionally developed infrastructure and maintenance</td>
</tr>
<tr>
<td></td>
<td>Access to lesser-known attractions is lacking.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ease of arrival and movement within the country</th>
<th>South Africa faces challenges:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Competitive car hire attaining higher service levels</td>
</tr>
<tr>
<td></td>
<td>Public and private transportation services still substandard</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Investment by private sector in hotels, restaurants, attractions, entertainment, tour operations, etc.</th>
<th>South Africa faces challenges:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Decline in tourism investment from 1997</td>
</tr>
<tr>
<td></td>
<td>Current oversupply of accommodation and other related services</td>
</tr>
<tr>
<td></td>
<td>Safety and security issues jeopardise potential investment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Long-term sustained investment by the public and private sectors in tourism infrastructure, destinations and resorts</th>
<th>Strong commitment from public and private sectors to the promotion of tourism</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Moderate increase in funds for the new development and maintenance of existing infrastructure</td>
</tr>
</tbody>
</table>
Human resources
- Skilled, adaptive and innovative human resources
- Culture of service

South Africa faces challenges:
- High rate of illiteracy
- Poor service culture
- Lags behind World standards
SUMMARY: NATIONAL AND PROVINCIAL TOURISM TRENDS

- Most domestic tourists travel to Gauteng and KwaZulu-Natal, followed by Limpopo Province.
- 20,9 Million domestic day trips were undertaken in 2000-2001.
- More black tourists are travelling than ever before.
- Inland tourism, including resort tourism, is on the increase in South Africa, therefore becoming more popular.
- Gauteng generates the most tourists of all provinces and borders Limpopo province.
- VFR market is the biggest followed by holiday and business.
- Major growth in trans-frontier parks is creating new development opportunities.
- Growth in travel to neighbouring countries creates new opportunities.
- The average domestic tourist spend R437-00 per overnight trip.
- Domestic tourism remains more important than international tourism in both activity and monetary terms.
- According to WTO, most industrialised countries will soon come close their ceilings for domestic tourism in respect of the proportion of active participants and the incidence of participation. Main growth areas will be in developing countries, where the proportion in active participants in tourism will increase significantly.
- Access, disposable income and proximity are key elements in determining future performance of destinations and the level of growth that can be attained.
- The development of tourism in an area in part to promote conservation of the natural environment, historic places and cultural traditions.
- Achieving conservation objectives balanced with socio-economic objectives.

The following broad trends appeared to be prevalent with the South African context, as stated by Heath, (2002), which could have implications for the tourism industry:

- An increase in disposable income and propensity to travel on the part of the previous disadvantaged communities.
- Increased awareness of tourism as a major factor in economic development.
• Increasing privatisation of government controlled enterprises.
• Increasing rationalisation regarding infrastructure, this could result in better utilisation of existing facilities.
• Growth in accommodation facilities coupled to increased diversity in standards and facilities.
• Escalating fuel prices (which affect travel and transport costs)
• Currency re-revaluations which impact significantly on a the destinations competitive position
• An increased pressure on the infrastructure and facilities in certain popular tourism areas, particularly during peak tourism periods.
6. Limpopo as a Destination

6.1 Introduction
Limpopo is the most northerly situated of the nine provinces in South Africa. It borders three other African countries; Botswana in the west and north-west, Zimbabwe in the north and Mozambique in the north-east and east. The eastern parts of the province include the Kruger National Park, which is the largest protected area in South Africa. The Tropic of Capricorn lies between Makhado and Polokwane, which is the capital city of Limpopo. The province covers a total of 123,280 square kilometres, and has a population of 5,300,000. The majority of the provinces people are living in rural areas.

The Limpopo Province is characterised by dramatic contrasts and reflects the quintessence of the African bush with its giant Baobabs, Marula, Leadwood and Jackalberry trees, savannah grasslands, mountains ranges and bushveld.

Steeped in history, Limpopo celebrates a rich cultural heritage and at many archaeological sites the mysteries of the past and ancient peoples are still unearthed. The present tranquillity of the province belies a turbulent past, to which many monuments and museums attest.

Due to a concerted effort by the private sector and government, much of the land is unspoilt providing sanctuary to the big 5 and a large number of games. Limpopo represents a microcosm of varied and interesting cultures, growing industries and an ever expanding tourism industry.

One of Limpopo's main assets is its unspoilt wilderness areas. The splendour and beauty of the Province, coupled with its wilderness atmosphere and rich habitat diversity, provide unmatched opportunities for eco-tourism development.
Eco-tourism is the core of the provincial tourism industry and the province boasts a well developed portfolio of parks and protected areas. In total there are 54 reserves and game parks, covering 2,8% of the total land area of the province, as well as 33 heritage sites. The vast, relatively unspoilt bushveld areas contributes to the growing tourism industry due to the beauty of it’s landscapes, the diversity and abundance of wildlife, particularly game, as well as it’s cultural diversity.

Game farming is one of the largest land use practices in the province. It is estimated that there are currently close to 4,000 exemption game farms in the province, while an increasing number of cattle farmers switch over to game farming. Particularly the hunting industries are flourishing. Hunters and other tourists from overseas as well as from other provinces in SA bring in much needed revenue. The full potential of these industries have however not yet to be realised. Eco-tourism is undoubtedly the option which can make the greatest single contribution to the development of previously disadvantaged communities and the present government not only supports but, also promotes this kind of development. It is, however, of utmost importance that these developments be planned and managed scientifically to ensure the sustainability and nature of these communal projects. The challenge therefore lies in the fact that development in the rural areas must target the existing space within the tourist market of the province.
6.2 An Analysis Of Tourism To Limpopo

Not only has Limpopo emerged as the province with the highest tourism growth rate in South Africa, but it is also proving to increasingly attract large numbers of tourists all year round.

In an analysis of SA travel trends the following is evident:

![Figure 5: Destination of South Africa’s Domestic Tourism Overnight Trips](source: South African Domestic Tourism 2001; DEAT, 2002a: 49)

Based on the information provided by Figure 5 it is clear that with exception of Gauteng and KwaZulu-Natal, most people travel to Limpopo, Western Cape and Eastern Cape. Therefore, it shows that this province has huge potential, more so as it is also bordering the major tourist market in South Africa, namely Gauteng.

**TABLE 6: DESTINATION OF SOUTH AFRICA’S DOMESTIC TOURISM OVERNIGHT TRIPS BY TYPE OF TRIP**

<table>
<thead>
<tr>
<th>DESTINATIONS</th>
<th>HOLIDAY %</th>
<th>VFR %</th>
<th>BUSINESS %</th>
<th>HEALTH %</th>
<th>RELIGIOUS %</th>
<th>TOTAL SHARE %</th>
</tr>
</thead>
<tbody>
<tr>
<td>EC</td>
<td>14.3</td>
<td>14.0</td>
<td>6.1</td>
<td>4.0</td>
<td>8.8</td>
<td>12.8</td>
</tr>
<tr>
<td>FS</td>
<td>4.5</td>
<td>7.7</td>
<td>8.3</td>
<td>11.4</td>
<td>4.8</td>
<td>6.7</td>
</tr>
</tbody>
</table>
Table 6 shows that religious travel, (28.7%) followed by visiting friends and relatives, (11.1%) as well as going to health resorts and general holiday purposes, (9.2%) are the major draw cards in Limpopo. If one analyse the holiday market, one sees a clear demand for game reserves and nature-based tourism.

Survey respondents were asked to indicate whether they had ever spent more than one night in the Limpopo Province. Just over one in five (22%) said that they had done so. Therefore the product/attraction needs to offer tourists enough opportunity to spend more time in Limpopo. More time spent equals more money spent.

6.3 Domestic Tourist Spending
The average expenditure per capita for all types of overnight trips in South Africa as a whole is R437 of which R182 (42%) was spent on transport, R97 (22%) on accommodation, R105 (24%) on food, R34 (8%) on entertainment and R20 (5%) on gifts.
These results reflected in the figure above, clearly indicates that Limpopo province needs to do more to keep tourists within their borders in order for them to spend money. Products therefore need to be well developed and packaged and the above could be seen as a marketing tool to indicate an affordable destination.

TABLE 7: OVERALL DEMOGRAPHIC PROFILE OF TRAVELLERS TO THE LIMPOPO PROVINCE (N=3 277 409)

<table>
<thead>
<tr>
<th>ORIGIN</th>
<th>%</th>
<th>AGE</th>
<th>%</th>
<th>RACE</th>
<th>%</th>
<th>LSM</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>EC</td>
<td>2.0</td>
<td>18-24</td>
<td>20.6</td>
<td>Black</td>
<td>90.9</td>
<td>1</td>
<td>0.2</td>
</tr>
<tr>
<td>FS</td>
<td>2.0</td>
<td>25-34</td>
<td>22.6</td>
<td>White</td>
<td>7.9</td>
<td>2</td>
<td>7.1</td>
</tr>
<tr>
<td>GT</td>
<td>26.5</td>
<td>35-49</td>
<td>27.0</td>
<td>Coloured</td>
<td>0.6</td>
<td>3</td>
<td>16.7</td>
</tr>
<tr>
<td>KZN</td>
<td>1.4</td>
<td>50+</td>
<td>29.8</td>
<td>Indian</td>
<td>0.5</td>
<td>4</td>
<td>29.0</td>
</tr>
<tr>
<td>MP</td>
<td>5.9</td>
<td>Total</td>
<td>100</td>
<td>Total</td>
<td>100</td>
<td>5</td>
<td>20.8</td>
</tr>
<tr>
<td>NC</td>
<td>0.1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>6</td>
<td>10.7</td>
</tr>
<tr>
<td>LP</td>
<td>53.7</td>
<td>Gender</td>
<td>%</td>
<td></td>
<td></td>
<td>7</td>
<td>6.7</td>
</tr>
</tbody>
</table>
Most tourists to the Limpopo destinations were residents of the province itself (53.7%), followed by Gauteng and North West residents (26.5% and 7.3% respectively). Most of the tourists were 50 years and older (29.8%), though the other age groups were also well presented. 90.9% was black followed by whites and the other two groups dipped below 1%. LSM 3-5 constituted 67% of the tourists. Females made up 55.5% and males 44.5%. The average size of a group travelling to Limpopo’s destinations was 5/6.

(Source: DEAT, 2001b: 78)
6.4 Reasons For Travelling To The Limpopo (Past Twelve Months)
Recent tourists (2002) to Limpopo destinations differed according to type of trip. The tourism survey differentiated between leisure, business, VFR, health and religious trips. The analyses that follow focus only on the most recent trip undertaken in each case.

![Figure 7: Limpopo trip types](Source: DEAT, 2001b: 79)

Most trips (49%) to Limpopo destinations in the last twelve months were for the purpose of visiting friends or relatives (VFR), followed by religion (28%) and holiday (15%). This is an important aspect in terms of proposed development.

<table>
<thead>
<tr>
<th>TOURISM REGION</th>
<th>TRIPS %</th>
<th>LEISURE</th>
<th>VFR</th>
<th>BUSINESS</th>
<th>HEALTH</th>
<th>RELIGION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bushveld</td>
<td>9.8</td>
<td>26.6</td>
<td>58.5</td>
<td>3.5</td>
<td>0.8</td>
<td>7.6</td>
</tr>
<tr>
<td>Valley of the Elephants</td>
<td>19.7</td>
<td>18.8</td>
<td>63.1</td>
<td>2.7</td>
<td>1.1</td>
<td>14.4</td>
</tr>
<tr>
<td>Soutpansberg</td>
<td>20.6</td>
<td>15.1</td>
<td>62.1</td>
<td>1.6</td>
<td>2.6</td>
<td>18.7</td>
</tr>
</tbody>
</table>

TABLE 8: REASONS FOR TRIPS TO LIMPOPO BY TOURISM REGION
Table 7 shows that most trips of all types in the Limpopo were to the Capricorn region. VFR trips were well spread across all the regions, but peaked for the Valley of the Elephants. The location of Moria (the ZCC headquarters) made the Capricorn region a particularly important destination for religious trips. After VFR trips, the most common reasons for visiting the Limpopo were leisure and religion.

The demographic profile of those who undertook VFR trips is given in table 9:

**TABLE 9: OVERALL DEMOGRAPHIC PROFILE OF VFR TRAVELLERS TO LIMPOPO (N=952 240)**

<table>
<thead>
<tr>
<th>ORIGIN</th>
<th>%</th>
<th>AGE</th>
<th>%</th>
<th>RACE</th>
<th>%</th>
<th>LSM</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>EC</td>
<td>1.9</td>
<td>18-24</td>
<td>21.9</td>
<td>Black</td>
<td>92.4</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>FS</td>
<td>1.8</td>
<td>25-34</td>
<td>24.9</td>
<td>White</td>
<td>6.6</td>
<td>2</td>
<td>7.6</td>
</tr>
<tr>
<td>GT</td>
<td>20.0</td>
<td>35-49</td>
<td>23.2</td>
<td>Coloured</td>
<td>0.8</td>
<td>3</td>
<td>19.6</td>
</tr>
<tr>
<td>KZN</td>
<td>0.9</td>
<td>50+</td>
<td>30.0</td>
<td>Indian</td>
<td>0.2</td>
<td>4</td>
<td>30.3</td>
</tr>
<tr>
<td>MP</td>
<td>3.6</td>
<td>Total</td>
<td>100</td>
<td>Total</td>
<td>100</td>
<td>5</td>
<td>19.4</td>
</tr>
<tr>
<td>NC</td>
<td>0.1</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>LP</td>
<td>66.6</td>
<td>Gender</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>NW</td>
<td>4.7</td>
<td>Male</td>
<td>40.5</td>
<td>%</td>
<td>8</td>
<td>%</td>
<td>6.4</td>
</tr>
<tr>
<td>WC</td>
<td>0.5</td>
<td>Female</td>
<td>59.5</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>TOTAL SA</td>
<td>100</td>
<td>Total</td>
<td>100</td>
<td>Total</td>
<td>100</td>
<td>%</td>
<td>%</td>
</tr>
</tbody>
</table>

(Source: DEAT, 2001b: 80)

Most tourists to the Limpopo were residents of the province (66.6%), followed by Gauteng residents (20%). North West contributed a distant 4.7%. Three in ten (30%) of the tourists were 50 years or older, and most were Blacks, falling in LSM 3 to 5 and were females.
TABLE 10: DEMOGRAPHIC PROFILE OF LEISURE TRAVELLERS TO LIMPOPO (N=305 231)

<table>
<thead>
<tr>
<th>ORIGIN</th>
<th>%</th>
<th>AGE</th>
<th>%</th>
<th>RACE</th>
<th>%</th>
<th>LSM</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>EC</td>
<td>0</td>
<td>18-24</td>
<td>20.0</td>
<td>Black</td>
<td>74.4</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>FS</td>
<td>1.5</td>
<td>25-34</td>
<td>16.0</td>
<td>White</td>
<td>23.0</td>
<td>2</td>
<td>5.5</td>
</tr>
<tr>
<td>GT</td>
<td>42.0</td>
<td>35-49</td>
<td>29.7</td>
<td>Coloured</td>
<td>1.2</td>
<td>3</td>
<td>15.9</td>
</tr>
<tr>
<td>KZN</td>
<td>1.5</td>
<td>50+</td>
<td>34.3</td>
<td>Indian</td>
<td>1.4</td>
<td>4</td>
<td>23.5</td>
</tr>
<tr>
<td>MP</td>
<td>5.9</td>
<td>Total</td>
<td>100</td>
<td>Total</td>
<td>100</td>
<td>5</td>
<td>9.3</td>
</tr>
<tr>
<td>NC</td>
<td>0.1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>6</td>
<td>9.6</td>
</tr>
<tr>
<td>LP</td>
<td>38.8</td>
<td>Gender</td>
<td>%</td>
<td></td>
<td></td>
<td>7</td>
<td>10.2</td>
</tr>
<tr>
<td>NW</td>
<td>6.1</td>
<td>Male</td>
<td>49.4</td>
<td></td>
<td></td>
<td>8</td>
<td>26.0</td>
</tr>
<tr>
<td>WC</td>
<td>4.1</td>
<td>Female</td>
<td>50.6</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>TOTAL SA</td>
<td>100</td>
<td>Total</td>
<td>100</td>
<td>Total</td>
<td>100</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Source: DEAT, 2001b: 80)

It is obvious from Table 9 that most leisure tourists were from Gauteng (42%). Second and third were residents of Limpopo (38.8%) and North West (6.1%). Most of the leisure tourists to Limpopo destinations were 50 years and older. Nearly two-thirds (74.4%) were Blacks and nearly one-quarter (23%) consisted of Whites. LSM 8 was the category in which most of the respondents fell (26%) and LSM 4 took second place (23.5%). The genders were evenly balanced.

6.5 Main Attractions

When one analysis tourism destinations or attractions in Limpopo, the following main attractions (in no particular order), were identified:

- Mapungubwe – World heritage site
- Greater Limpopo Transfrontier Park – Traverses South Africa, Zimbabwe and Mozambique
- Kruger National Park
- Rain Queen (Modjadji)
- African Ivory Route
- Makapansgat Valley
- Magoeba’s Kloof
- Baobab trees
- Cultural dances
- Venda myths and legends
- Hunting
- Religious tourism
- Bushveld
- Game reserves
- Nature / game viewing
- Soutpansberg
- Fruit and tea plantations

(Limpopo Tourism and Parks Board, 2003)

### Tourists’ preferences

<table>
<thead>
<tr>
<th>TYPE</th>
<th>ATTRACTIONS</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADVENTURE TOURISM</td>
<td>Hunting</td>
<td>All areas</td>
</tr>
<tr>
<td></td>
<td>Mapulaneng Hiking Trail</td>
<td>Bosbokrand</td>
</tr>
<tr>
<td></td>
<td>Doorndraai Dam</td>
<td>Modimolle</td>
</tr>
<tr>
<td></td>
<td>Tzaneen Dam (Water sports &amp; adventure)</td>
<td>Tzaneen</td>
</tr>
<tr>
<td></td>
<td>Lesedi &amp; Louis Changion trials</td>
<td>Haenertsburg</td>
</tr>
<tr>
<td></td>
<td>Trout fishing</td>
<td>Haenertsburg</td>
</tr>
<tr>
<td></td>
<td>Mountain biking</td>
<td>Haenertsburg</td>
</tr>
<tr>
<td></td>
<td>Sky Diving</td>
<td>Modimolle</td>
</tr>
<tr>
<td></td>
<td>The Ivory Route</td>
<td>Various</td>
</tr>
<tr>
<td></td>
<td>Mokolo Dam</td>
<td>In the Waterberg Mountains</td>
</tr>
<tr>
<td></td>
<td>Micro light Flips</td>
<td>Phalaborwa, Hoedspruit</td>
</tr>
<tr>
<td></td>
<td>Magoebaskloof trails</td>
<td>Tzaneen and surrounds</td>
</tr>
<tr>
<td></td>
<td>Dokolewa and Debegeeni</td>
<td>Tzaneen and surrounds</td>
</tr>
<tr>
<td>Falls trails</td>
<td>Hiking trails</td>
<td>Entabeni hiking trail</td>
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<td>-------------------------------</td>
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</tr>
<tr>
<td></td>
<td>Alldays, Makhado,</td>
<td>Thohoyandou</td>
</tr>
<tr>
<td></td>
<td>Mokopane, Thabazimbi</td>
<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td><strong>CULTURAL TOURISM</strong></td>
<td><strong>Bakone Molapa Northern</strong></td>
<td><strong>Polokwane</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Sotho Open Air Museum</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Rain Queen Modjadji</strong></td>
<td><strong>Modjadji’skloof</strong></td>
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<tr>
<td></td>
<td><strong>and surrounds</strong></td>
<td></td>
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<td></td>
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<tr>
<td></td>
<td><strong>The Nyani Cultural Village</strong></td>
<td><strong>Tzaneen</strong></td>
</tr>
<tr>
<td></td>
<td><strong>The Tsonga Kraal Open-Air Museum</strong></td>
<td><strong>Letsitele</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Phiphidi Falls/Guvhukuvhu Pool</strong></td>
<td><strong>Thohoyandou</strong></td>
</tr>
<tr>
<td></td>
<td><strong>ZCC (Moria)</strong></td>
<td><strong>Polokwane</strong></td>
</tr>
<tr>
<td><strong>NATURE &amp; WILDLIFE</strong></td>
<td><strong>Chuene Crocodile Farm</strong></td>
<td><strong>Near Chueniespoort</strong></td>
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<tr>
<td></td>
<td><strong>Moletzi Bird Sanctuary</strong></td>
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<tr>
<td></td>
<td><strong>The Polokwane Bird Sanctuary</strong></td>
<td><strong>Polokwane</strong></td>
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<tr>
<td></td>
<td><strong>Waterberg Biosphere</strong></td>
<td><strong>Mabatlane</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Polokwane Game Reserve</strong></td>
<td><strong>Polokwane</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Kruger National Park</strong></td>
<td></td>
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<tr>
<td></td>
<td><strong>Mangombe Nature Reserve</strong></td>
<td><strong>Giyani</strong></td>
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<tr>
<td></td>
<td><strong>Manyeleti Game Reserve</strong></td>
<td><strong>Near Orpen</strong></td>
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<tr>
<td></td>
<td><strong>Letaba Ranch</strong></td>
<td><strong>North of Phalaborwa</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Makuya Park</strong></td>
<td><strong>Near Pafuri</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Madimbo Corridor,</strong></td>
<td><strong>Near Musina</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Blouberg</strong></td>
<td><strong>South of Alldays</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Makapan’s Cave</strong></td>
<td><strong>Close to Mokopane</strong></td>
</tr>
<tr>
<td>Nature Reserve</td>
<td>Location</td>
<td></td>
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<td>--------------------------------</td>
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<td></td>
</tr>
<tr>
<td>Atherstone Nature Reserve</td>
<td>Near Thabazimbi</td>
<td></td>
</tr>
<tr>
<td>Timbavati Reserve</td>
<td>Hoedspruit</td>
<td></td>
</tr>
<tr>
<td>Kapama Cheetah Breeding Project</td>
<td>Hoedspruit</td>
<td></td>
</tr>
<tr>
<td>Moholoholo Rehabilitation Centre</td>
<td>Hoedspruit</td>
<td></td>
</tr>
<tr>
<td>Swadini Reptile Park</td>
<td>Hoedspruit</td>
<td></td>
</tr>
<tr>
<td>Hans Merensky Nature Reserve</td>
<td>Letsitele</td>
<td></td>
</tr>
<tr>
<td>The Modjadji Cycad Reserve</td>
<td>Modjadji’skloof and surrounds</td>
<td></td>
</tr>
<tr>
<td>Baobab tree</td>
<td>Mooketsi</td>
<td></td>
</tr>
<tr>
<td>The Blouberg</td>
<td>Alldays</td>
<td></td>
</tr>
<tr>
<td>The Soutpansberg Mountain Range</td>
<td>Makhado</td>
<td></td>
</tr>
<tr>
<td>The Ben Lavin Nature Reserve</td>
<td>Makhado</td>
<td></td>
</tr>
<tr>
<td>The Hangklip Picnic Site and Forest</td>
<td>Makhado</td>
<td></td>
</tr>
<tr>
<td>Langjan Nature Reserve</td>
<td>Makhado</td>
<td></td>
</tr>
<tr>
<td>Mapungubwe</td>
<td>Musina</td>
<td></td>
</tr>
<tr>
<td>Limpopo National Park</td>
<td>Musina</td>
<td></td>
</tr>
<tr>
<td>Matakwe</td>
<td>Musina</td>
<td></td>
</tr>
<tr>
<td>Messina Nature Reserve</td>
<td>Musina</td>
<td></td>
</tr>
<tr>
<td>Erich Mayer and Impala Lily Parks</td>
<td>Musina</td>
<td></td>
</tr>
<tr>
<td>Mphaphuli Cycad Nature Reserve</td>
<td>Thohoyandou</td>
<td></td>
</tr>
<tr>
<td>Lake Funduzi</td>
<td>Thohoyandou</td>
<td></td>
</tr>
<tr>
<td>Thathe Vondo Forest</td>
<td>Thohoyandou</td>
<td></td>
</tr>
<tr>
<td>Nature Reserve</td>
<td>Location</td>
<td></td>
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<td>---------------------------------------</td>
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<td></td>
</tr>
<tr>
<td>The Lwamombo Hill</td>
<td>Between Thohoyandou and Makhado</td>
<td></td>
</tr>
<tr>
<td>Nzhelele Dam and Nature Reserve</td>
<td>Thohoyandou</td>
<td></td>
</tr>
<tr>
<td>Nwanedi Nature Reserve</td>
<td>Thohoyandou</td>
<td></td>
</tr>
<tr>
<td>Lupephe Dam</td>
<td>Thohoyandou</td>
<td></td>
</tr>
<tr>
<td>D'Nyala Nature Reserve</td>
<td>Lephale</td>
<td></td>
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<tr>
<td>Nylsvlei Nature Reserve</td>
<td>Modimolle</td>
<td></td>
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<tr>
<td>Strijdom Nature Reserve</td>
<td>Modimolle</td>
<td></td>
</tr>
<tr>
<td>Doorndraaidam Nature Reserve</td>
<td>Modimolle</td>
<td></td>
</tr>
<tr>
<td>Thabaswa Mountain</td>
<td>Mokopane</td>
<td></td>
</tr>
<tr>
<td>The Game Breeding Centre</td>
<td>Mokopane</td>
<td></td>
</tr>
<tr>
<td>The Percy Fyfe Nature Reserve</td>
<td>Mokopane</td>
<td></td>
</tr>
<tr>
<td>The Marakele Park</td>
<td>Thabazimbi</td>
<td></td>
</tr>
<tr>
<td>Mokolo Dam and Nature Reserve</td>
<td>Mabatlane and surrounds</td>
<td></td>
</tr>
<tr>
<td>Natural hot springs</td>
<td>Bela-Bela</td>
<td></td>
</tr>
<tr>
<td>Mokopa Reptile Park</td>
<td>Bela-Bela</td>
<td></td>
</tr>
</tbody>
</table>

(VEZA, 2003)
6.6 Summary: Tourism trends in Limpopo

- Access, disposable income, on-site entertainment and proximity are key elements in determining future development and performance.
- Tourists are becoming more experienced in their travel habits and expect good quality attractions, facilities and good value for money in their travel expenditures.
- More tourists choose to participate in sports and adventure and learn about the history, culture, nature and wildlife of areas they visit. They are more physically and intellectually active now than previously.
- More tourists wish to pursue their own special interests - including nature and wildlife, visiting historic sites, observing cultural patterns.
- Many tourists are taking frequent but short vacations throughout the year i.e. weekends. The outcome is time efficient product development – offering the visitor maximum thrills in minimum time.
- Business travel and conference/meeting travel will continue growing. Most MICE market tourists function as holiday tourists as part of their stay in an area or as future holiday tourists.
- “Roots” tourism including visiting ancestral home areas is becoming more popular. Nature, cultural, adventure and religious tourism are rapidly growing.
- More tourists are concerned about maintaining and improving their health, hence much development of health resorts and spa’s.
7. Clustering

Tourism clusters are classified as tourism attractions that are located in close proximity to each other and that have the potential to contribute significantly towards accelerated growth in the tourism sector of Limpopo Province.

Limpopo Government has adopted the cluster concept as the fundamental approach for development planning at the provincial, district and municipal levels. It is a vehicle to raise the international competitiveness and investment rating of the province, to combine public and private sector contributions to development and to align the interventions of various public development institutions for greater impact. In practical terms it means the value chains of each destination or cluster should be mapped and extended as the basis for rapid increases in the contribution from tourism to provincial GGP. (A Tourism Growth Strategy for Limpopo Province, February 2004) The provincial cluster approach should serve as a reference framework in the identification and promotion of new tourism projects. The following clusters were identified:

- Family and Recreation
- Game and Golf
- MICE (sport, conferences, infrastructure, etc.)
- Game and Safari (hunting and game)
- Special Interest (heritage, birding, 4x4, fishing)
- Mega Conservation Areas (Biospheres, TFCA’s, conservancies)

Public sector interventions in accelerating the growth of the tourism industry include the commercialization of provincial game reserves, education and skills development with specific reference to the tourism sector, improvement of infrastructure and collective destination marketing.
The Provincial Strategy (February 2004) further recommends that the cluster value chain maps should become the basis for the identification, analysis, packaging and marketing of new development projects between provincial economic cluster members and the private sector operators that are already conducting business within the emerging clusters. This approach should facilitate many new opportunities for public-private partnerships. It also becomes the basis to align the interventions of all parastatals, as well as interventions from the infrastructure and social clusters. Interaction with the private sector within the cluster development context is encouraged.

National, as well as district and municipal tourism development interventions should also be mobilized within the cluster context for greater impact. It is anticipated that tourism development strategies per destination may be more appropriate than municipal tourism strategies, because destinations do not recognize municipal boundaries. Clusters of attractions are also more effective in drawing tourists than single and often isolated products.

Strategic linkages between destinations (clusters of attractions) are also an effective strategy to keep tourists in the province for longer periods, which will benefit the industry. The next table provides a summary of the destinations that impact on the Modimolle municipal area and the proposed tourism projects that are associated with each destination.

### Projects per destination impacting on Modimolle Municipal area

<table>
<thead>
<tr>
<th>CLUSTER</th>
<th>PROJECT NAME</th>
<th>PROJECT DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modimolle and the Springbok Flats</td>
<td>Heritage View Mountain Estate (proposed)</td>
<td>Wellness Centre and Estate development half way between BelaBela and Modimolle</td>
</tr>
<tr>
<td>Rust de Winter Dam (proposed)</td>
<td>Government reserve to be commercialised. Family based lodge development</td>
<td></td>
</tr>
<tr>
<td>Fish Eagle golf estate, Rust de Winter Dam (proposed)</td>
<td>Retief Goosen designer golf course and security estate</td>
<td></td>
</tr>
<tr>
<td>Golf Course developments</td>
<td>Waterberg estate and golf course (proposed) Elements Golf course (under constr) Gary Player designer golf course (proposed)</td>
<td></td>
</tr>
<tr>
<td>Modimolle and the north eastern bushveld</td>
<td>Middelkop Outdoor Leisure estate (proposed)</td>
<td>Equestrian centre, polo field, 4x4 track, Wing shooting, 9hole members golf course</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>BelaBela Magnet (proposed)</td>
<td></td>
<td>To be identified</td>
</tr>
<tr>
<td>Modimolle and the north eastern bushveld</td>
<td>Doormdraai Dam ([proposed])</td>
<td>Government reserve to be commercialised. Lodge and leisure related accommodation linking to water based activities</td>
</tr>
<tr>
<td>Middlefontein development</td>
<td></td>
<td>Several new projects planned on claimed land, including lodge and holiday resort. Upgrading of existing facilities such as caravan Park,</td>
</tr>
<tr>
<td>Nylsvlei Reserve (proposed)</td>
<td></td>
<td>Govt reserve to be commercialised. Could be linked to Middlefontein. World class bird watching.</td>
</tr>
<tr>
<td>Kranskop Game &amp; Nature Reserve</td>
<td>10 km from Nylsvlei. Lodge &amp; chalet development</td>
<td></td>
</tr>
<tr>
<td>Donkerpoort Dam</td>
<td></td>
<td>Day visitor, caravanning, water based activities</td>
</tr>
<tr>
<td>Verloren Estate</td>
<td>10km from town on old road. Leisure estate development. Services agreement with municipality</td>
<td></td>
</tr>
<tr>
<td>Modimolle Town</td>
<td>Tourism Magnet (site to be identified).</td>
<td>Creation of magnet to encourage visitors to spend time in town. Land next to Nyl River possibility.</td>
</tr>
<tr>
<td>Koro Creek</td>
<td></td>
<td>Golf Estate</td>
</tr>
<tr>
<td>Mabatlane Town</td>
<td>Mabatlane Facelift (proposed)</td>
<td>Upgrade general appearance of the town.</td>
</tr>
<tr>
<td></td>
<td>Mabatlane Magnet (proposed)</td>
<td>Creation of magnet same as Modimolle. Investigate existing venues.</td>
</tr>
<tr>
<td>Modimolle and the central Waterberg</td>
<td>Waterberg Biosphere Reserve, including the Moepel Farms</td>
<td>Could be incorporated into the Biosphere Reserve. Eco tourism based developments</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
8. Modimolle as a Destination

8.1 The area:

According to historians, Thomas Baines, a well known explorer, naturalist and painter, tells a fascinating story of how the Nyl River received its name. Known to the locals as Mokgalakwena (meaning “fierce crocodile”), the north – flowing river was mistakenly believed to be the Nile River by a group of Voortrekkers, known as the Jerusalemgangers, who arrived in the area in 1986. A pyramid-shaped hill nearby (Modimolle mountain) strengthened their conviction that they had crossed Africa and reached Egypt.

Today the Town of Nylstroom has been renamed Modimolle, after the prominent hill close by which the locals regard as their holy mountain (Modimolle meaning ‘Place of the spirits’). The town is the commercial centre of the Waterberg District and is famous of its export grapes and soft fruits such as peaches and watermelons. Other important products are cattle, game, peanuts and maize.

Regarded as the gateway to the Waterberg, the area is particularly known for its variety of outdoor recreation options, ranging from horse safaris, hiking and nature trails, to luxury hunting safaris. Bird watching at the internationally famous Nylsvlei Nature Reserve, where up to 200 species are easily spotted in the course of the day, also attracts many visitors to the area.

The pleasant climate with hot summers and moderate winters makes Modimolle a year round holiday destination, only one and a half hours’ drive from Johannesburg on the N1 to Zimbabwe. The road from Bela-Bela to Modimolle along the R101 route offers both an alternative to the toll road and exceptional beauty and scenery.

Famous South Africans associated with Modimolle include Advocate JG Strijdom, a former Prime Minister of the Union of South Africa; the artists Erich Mayer and Pierneef.
who both lived and worked in the area and the architect Gerhard Moerdijk, who specialized in churches, public and government buildings such as the Union Buildings and the Voortrekker Monument in Pretoria.

8.2 Sight Seeing and Other Activities

Historic sights, in and around Modimolle include the JG Strijdom House and Museum where the former statesman lived for twenty years and which has been declared a national monument, as well as places related to the Anglo Boer War concentration camp established here in 1901.

Historic churches include the Reformed church in Calvin Street, designed by Gerhard Moerdijk and built in 1929 and next to it, the oldest church building in Limpopo dating back to 1889, which has also been declared a national monument.

Other architectural gems include Bakker’s Pharmacy with its pharmaceutical and photographic antiques, the façade to the commando offices, Ons Hoop Building and the FH Odendaal Hospital.

Train enthusiasts will enjoy the original locomotive used on the line between Pretoria and Modimolle after the line was completed in 1898, which now has pride of the place at the railway station. A ride on the luxury colonial train, the Nylsvlei Express to the nearby Boekenhout station also makes for a fun outing.

Donkerpoort Dam, some 11 km northwest of the town on the R517 is a popular fishing spot for carp, bream, black bass and barbel. It is also a very popular spot for general water sport.

The eight hot springs resorts, located within a radius of 40 kilometres around Nylstroom, offer a variety of recreation and accommodation facilities and draw thousands of visitors to the area annually.
The unique Nyl floodplain located 30 kilometres from Modimolle, is a principal wetland of 16 000 hectare and is home to the largest variety of water birds in the southern hemisphere. Approximately 20 percent of the floodplain is formally preserved as the Nyosvllei Nature Reserve and also provides sanctuary to endangered species of mammals, including endangered antelope such as the Roan and Tsessebe.

Typical bushveld savannah surrounds the grassveld floodplain which receives its water from ten rivers and steams that flow from the Waterberg onto the plain. In years of high rainfall, when the entire floodplain is likely to become inundated, as many as 80 000 water birds can be attracted to the wetland.

In all, 104 of the 365 bird species recorded here are water birds and 87 species are breeding here. Nyosvllei’s bird list include 37 red-data listed species, amongst them the critically endangered Bittern. The reserve supports important population of several water bird species that have restricted breeding ranges in South Africa, including the Lesser Gallinule and Dwarf Bittern.

Apart from the floodplain birds which come and go according to conditions and seasons, there is also a great variety of interesting savannah birds to be seen.

The reserve was listed in July 1998 as a RAMSAR site, an internationally important habitat for waterfowl.

Nyosvllei is an easy one-and-a-half-hour drive from Johannesburg and is open to day visitors and campers. The reserve is open daily from 06:00 to 18:00 through out the year. Visitors are allowed to walk or ride bicycles on the good road system within the reserve. Five bird’s hides, that overlook permanent water spots, are popular with bird watchers.

Friends of Nyosvllei and the Nyl Floodplain are a voluntary organization that arranges regular outings and information courses at the reserve.
8.3 Modimolle Tourism Information
Modimolle Municipality
Tel: 014 717 5211
Fax: 014 707 4077
E mail: admin@modimolle.gov.za

ACTIVITIES:

Hiking
Bukane Caravan Park
Tel: 014 717 1053
Kiepersol Hiking Trails
Tel: 014 715 2295
Kierieklapper Hiking Trails
Tel: 014 721 0790
Lekkerbreek Hiking Trails
Tel: 014 715 2593

Off Roading
Bukane Caravan Park
Tel: 014 717 1053
Shamack Trails
Tel: 014 717 5890
Waterberg 4X4 Adventures
Tel: 014 721 0820

ANNUAL EVENTS AND FESTIVALS
Grape festival – January
Tel: 014 717 4691
Modimolle Cycling Festival – February
Tel: 014 719 9211
Art Collage – September
Tel: 014 717 4270

GENERAL INFORMATION
Friends of Nylsvlei and Nyl Floodplain
Tel: 012 667 2183
Nylsvlei Nature Reserve
Enquiries & Camp bookings
Tel: 014 743 1074

MODIMOLLE AIRFIELD
Co-ordinates
S24 41.12 E028 26.30
Contact no: 083 268 0052

DISTANCES
Distance from Polokwane 148 km
Distance from Mokopong 45km
Distance from BelaBela 27 km
Distance from Pretoria 130 km
Average summer maximum 33°C
Average winter maximum 19°C
8.4 Mabatlane as a Destination

Mabatlane, in the heart of the Waterberg was established at the turn of the century and is possibly best known for its game and holiday farms. Other important products produced in the area include high quality grapes, tobacco, peanuts and maize.

Mabatlane is situated 64 km from Modimolle, 88km from Lephalale and 30km from Mokopane. Game farms in and around Mabatlane offer visitors hunting, game watching, hiking and horse trails. A landing strip for light aircraft is also available. There is a variety of interesting sightseeing i.e. The Anglican Church at Twenty Four Rivers, which was designed by Sir Herbert Baker and is still in use. The well known writer Eugene Marais established himself at Doornhoek and made the Waterberg his laboratory. Mabatlane hosts regular game festivals and auctions, which is great fun and interesting to experience.

The Waterberg Mountains can be described as a large inverted saucer stretching from Modimolle and Mokopane in the east as far as Thabazimbi in the west. Within the central core is a vast basin dissected by numerous rivers, the principal being the Mokolo, which rises in the southern hills’ watershed and flows in a north westerly direction. It is here that the principal activity of tobacco farming takes place, owing to the good supply of water. The town of Mabatlane services the needs of these activities. The outer perimeter of the mountain range is spectacular, the highest part being in the south and south-west encompassing the Marakele National Park and recently formed Welgevonden Game Reserve.

8.5 Supply side analysis

The supply side analysis includes all aspects than can host tourists in an area. Therefore it includes accommodation, restaurants facilities, tourist’s attractions and the number of tour operators.

See Appendix B

9.1 Introduction

The basic principles of any marketing plan are the same. The purpose is to match the product to the right target market, achieving the desired results, in this case, attracting more tourists to the target area and growing the industry within the framework of regional economic development. Marketing is more than just advertising; it constitutes four essential elements (the four P’s), i.e. Product, Price, Place and Promotion. A good marketing plan incorporates a combination, or all of these elements. As with any business venture, the entry into the market should be well planned and properly managed.

“... marketing...is more than just advertising”

The challenge with tourism marketing is that the principal products are experiences and hospitality. These are intangibles and much more difficult to market than tangible items such as household appliances. The consumer also needs to travel to the product in order to experience it and as such, you don’t get a second chance to make a good first impression. You can’t take travel for a test drive. The tourism marketing message should focus on consumer experience and be inviting enough to create expectations.

For the consumer the tourism experience is made up of a number of components including; transportation, accommodation, shopping, food, entertainment, touring and events.

The plan will guide the marketing decisions and assist in allocating resources. It incorporates:
9.2 Overall guiding principles and Core Values

The following cross cutting or overall principles should guide the strategy:

- Customer driven – Hospitality and good experiences creates life long customers
- Quality – Quality service and products bring the tourist back. The foundation for quality is comprehensive training, evaluation and accreditation programs for both management and staff.
- Accessibility – Good infrastructure, effective signage, easy to access information
- Sustainability – Regard the marketing strategy as an investment to be sustained over the long term.
- Skills development – An ongoing essential principle to guarantee quality
- Business excellence – The business of tourism requires excellence to remain competitive

9.3 Shared vision, commitment and buy-in

It is important to determine the factors, internally and externally, that will affect or impact on the implementation of the strategy. Clearly, unless there is a shared vision, commitment (financially) and buy-in or support, by all the principles and role players, little or no success will be achieved.

9.4 Market identification

Identifying and understanding your target markets should be the foundation of your marketing plan.

In order to succeed in the competitive market, it is important to tailor your message and product offering to your customer’s requirements. By understanding how your region and product might appeal to the market, you can tailor your product, marketing and promotional activities to attract new business.

Customer characteristics such as age, socio economic background, lifestyle choices and personal values, as well as identification of their key needs, will further define the market.
Targeting particular market segments enables you to more effectively tailor your message and your marketing and promotional activities. Many travel and tourism products make the mistake of trying to appeal or address all markets and all people. It is impossible to be all things to people.

What are the specific markets and segments that are most likely to be targeted?
From the research it is evident that most trips (49%) to Limpopo destinations in the last twelve months were for the purpose of visiting friends or relatives (VFR), followed by religion (28%) and holiday (15%). This is an important aspect in terms of determining the market. The Bushveld region (including Modimolle municipal area) received approximately 10% of visitors to Limpopo. Most trips to the study area were for the purpose of VFR (58.5%), followed by holiday and leisure (26.6%) and religion (7.6%)

It is interesting to note that most tourists were Limpopo residents (66.6%), followed by Gauteng residents (20%). 30% of tourists were 50 years and older. There is a very strong indication that in general, average occupation rates in the study area are below 45%. This sends a strong message that there is not a shortage of bed nights in the study area, but rather a lack of coordinated marketing to promote the area properly. Some other important trends to consider:

- Tourists are becoming more experienced in their travel habits and expect good quality attractions, facilities and good value for money in their travel expenditures.
- More tourists choose to participate in sports and adventure and learn about the history, culture, nature and wildlife of areas they visit. They are more physically and intellectually active now than previously.
- More tourists wish to pursue their own special interests - including nature and wildlife, visiting historic sites, observing cultural patterns.
- Many tourists are taking frequent but short vacations throughout the year i.e. weekends. The outcome is time efficient product development – offering the visitor maximum thrills in minimum time.
• Business travel and conference/meeting travel will continue growing. Most MICE market tourists function as holiday tourists as part of their stay in an area or as future holiday tourists.
• “Roots” tourism including visiting ancestral home areas is becoming more popular. Nature, cultural, adventure and religious tourism are rapidly growing.
• More tourists are concerned about maintaining and improving their health, hence much development of health resorts and spa’s.

The statistics clearly indicate that marketing should be focused on Limpopo (local) and Gauteng markets, aimed at the day and weekend visitor (families), encouraging them to take more but shorter breaks, as captured in the section dealing with Limpopo tourism trends.

• Marketing objectives. Are the objectives for each target market measurable, achievable, time-specific, non-ambiguous and flexible?
• Marketing strategy. What is the best combination of the four P’s for each of your target markets, branding, advertising etc
• The action plan. What are the actions needed to make the plan work, who will do it and when?
• The marketing budget. How much do you have to spend and how will you allocate the resources?
• Monitoring and evaluation. How will you manage and measure the performance of your marketing efforts?

9.5 The Marketing Message.

Focus on the STAR BRANDS

Effort and resources must be focussed on branding the area as:
Proposed Brands

• the Waterberg Experience
• Waterberg Incorporated
• Destination Waterberg
• Route R101 Waterberg
• Waterberg Xtreme
Supporting Brands:
- Outdoor Xperience
- Xtreme Sport
- 4x4 Xperience
- Xtreme birding
- Xtreme hiking etc.

Focus on **MAKE IT EASY**
- For the industry to succeed, Modimolle Municipality must make it easy for visitors to …..
  - Find information
  - Easy destination booking
  - How to get here
  - How to get around
  - Enjoy their visit
  - Decide to return

Focus on **SUPPORTING THE BEST**
- Targeting excellence in business support
  Tourism is not a leisure activity – it is a business
- Quality networks to support SME’s
  Encourage private sector and government to develop a support base for skills development and mentorship programmes in the Tourism industry i.e. Tour operators, Hotel Management and Service staff etc. (See BEE Scorecard page ? for detail)
- Clear investment criteria
  Modimolle Municipality must develop their own set of clear investment criteria and preferably added incentives other national and provincial incentives
- Making the transition
Commitment, both political and institutional. Identify champions (public and private) to take charge, support and build the tourism industry.

- Professional partnerships within the industry
  Link-up with industry leaders on national and provincial level i.e. Development Bank, IDC, LimDev, TIL, etc.

**Focus on being NO 1 FOR THE BUSINESS**

- Tourism as a Business is a top priority

**Focus on EXCELLENT EVENTS**

- Promote the bigger Modimolle area, including Bela Bela, Mokgopong etc.
- Decide on annual themes and events to be included on the annual calendar i.e.
  - Grape festival,
  - Limpopo wildlife expo and game auction at Mabatlane,
  - Cycle event,

- New events to be identified:
  - National 4x4/offroad event
  - National/international sky diving event
  - Strategise on how to best take advantage of the opportunities offered by 2010 Soccer World Cup

**POLISHING THE GEMS**

Upgrading and maintaining existing attractions. Focus on interesting GEMS for the family

- Natural attractions i.e. Nyl river and environment, existing hot springs
- Buildings of national importance i.e. churches etc.

**Focus on INTELLIGENCE LED**

- Central data and booking system
- Tourgate portal to supply necessary industry information to tourists
9.6 Setting Your Marketing Budgets

There is no rule that specifies how much should be allocated to the marketing budget. This is often a difficult decision to make, as financial resources would often be focussed on other priorities, so much more in the case of a municipality. As domestic tourism is the “bread and butter” of most tourism operations and the industry in general, most marketing budgets are spent on domestic marketing activities.

“...domestic tourism...is the bread and butter of the industry”

Therefore, the bulk of the budget earmarked for tourism marketing will be spent on domestic or local marketing. It will further be very important to thoroughly research and plan any targeted international marketing to maximize the small portion of the budget allocated to this area, should it feature in the plan at all.

The strategy must make provision for co-operation with other tourism associations in order to maximise financial resources. The marketing budget will be determined in consultation with the Municipality.

9.7 The 4 P’s

Product (Marketing message)
Your product is the combination of ‘goods and services’ that make up the visitor experience, including the standard of your facilities and equipment, the level of service you provide and the quality of your interpretation.
The development of the message should be guided by the type of experience or holiday needs the target market seeks.

When developing the product:

- Consider the product from the consumers view and focus on the benefits for them; otherwise you might have a product that nobody wants.
- Think of the characteristics that make your product a unique selling proposition (USP), your point of difference from the competition.
- Remember that the characteristics of your product or service that directly meet your customer’s needs may differ according to the market and customer you are getting.

It is often difficult to attract international visitors to an area outside established destinations, as they may have limited time and knowledge of these areas. However, by working co-operatively with the Provincial Tourism Board, to promote the destination as a whole, increasing awareness may create a better chance that visitors will take the time to visit the area.

“...tourism is in essence a service industry...”

It is important to work in cooperation with local operators and create a package that will make your product more enticing. As tourism is essentially a service industry it is important that quality standards permeate every aspect of your operation. Operators that successfully meet certain standards can use their accreditation in their marketing programs. Consumers and the travel trade are increasingly choosing product suppliers based on their accreditations, as it provides an assurance that suppliers are committed to professionalism both operationally and in delivery of service.
Price
Although price is not really relevant in the context of this strategy, as Modimolle municipality will market a generic product, it is sufficient to say that Price will always contribute to the popularity of the destination.

Place (Distribution)
Distribution is the vital information link between the product and the market. It is not enough to have a perfectly tailored product and expect visitors to beat a path to your door. While word of mouth and direction may be an essential part of the marketing mix, other mediums will have to be engaged to assist in getting the message across. A distribution strategy considers the ‘place’ your product is sold.

- **Tourism Information Centres**
As many local travellers arrive in the area with limited travel arrangements planned, local distribution through visitor or tourism information centres (displays, brochures, pamphlets) already play an important role. Close co-operation between information centres of Modimolle, Mabatlane and other community tourism organisations are important. The establishment of a Destination Development & Marketing Organisation for Waterberg will contribute to co-ordinated efforts.

- **Media to consider for advertising**
An advertising campaign is proposed to first of all build brand (see marketing message) for the area, and secondly to communicate messages to the different target markets in an effort to attract more tourists to the area. Advertising can be an expensive option, especially when marketing internationally, therefore the choice is to advertise in those publications that will reach the identified local target market. It is anticipated that advertising is likely to play an important role in the domestic brand building and marketing strategy.

Cooperative advertising with partners is another great way to share the costs and package with other travel products (TIL, LPTB)
In choosing the different media, affordability and cost effectiveness play an important role. For this purpose television (too expensive) and direct mail (not applicable) has not been considered.
Advantages and Disadvantages of major advertising media:

<table>
<thead>
<tr>
<th>Media</th>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
</table>
| Magazines and Trade Journals                | • Reach of issues is high for demographic and geographic segments  
|                                            | • High quality production  
|                                            | • Ad lasts as long as magazine or journal is kept  
|                                            | • Issues are often read by more than one person  
|                                            | • Credibility of magazine or journal can benefit ad  
|                                            | • Must place ad well in advance of publication  
|                                            | • Provide limited flexibility in gaining attention  
|                                            | • Provide incomplete control over location of ad in issue  
| Internet                                    | • Accessible worldwide  
|                                            | • Information immediately available  
|                                            | • Cost effective to develop and maintain  
|                                            | • Act as portal  
|                                            | • Not everybody have access  
| Outdoor advertising, incl. Billboards, Posters, | • Relatively inexpensive  
|                                            | • Many repeat exposures  
|                                            | • Only very limited message possible  
|                                            | • Cannot reach well-defined target markets  
|                                            | • Very short exposure time  
| Radio                                       | • Audio capability  
|                                            | • Low costs relative to other media types  
|                                            | • Short lead time needed to place ad  
|                                            | • Can reach demographic and geographic segments  
|                                            | • No visual capability  
|                                            | • Short exposure time  
|                                            | • Provides little flexibility in gaining attention  

Reaches large audiences
Reaches audiences in cars

Newspapers
- Reach large audiences
- Can reach segments by locale
- Short lead time needed to place ad
- Credibility of newspaper can benefit ad
- May be relatively expensive
- Provide little flexibility for use of creativity
- Limited reproduction quality (i.e. little or no use of colour)
- Short life carries over to ad

Proposed Media

<table>
<thead>
<tr>
<th>Medium</th>
<th>Media</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio</td>
<td>• Radio Jacaranda</td>
</tr>
<tr>
<td></td>
<td>• Highveld Stereo</td>
</tr>
<tr>
<td></td>
<td>• Radio Metro</td>
</tr>
<tr>
<td></td>
<td>• Thobela FM, etc.</td>
</tr>
<tr>
<td>Print</td>
<td>• Getaway Magazine (trade)</td>
</tr>
<tr>
<td></td>
<td>• Local (Provincial) newspapers</td>
</tr>
<tr>
<td></td>
<td>• Weekend newspapers (travelling sections)</td>
</tr>
<tr>
<td></td>
<td>• Sowetan</td>
</tr>
<tr>
<td></td>
<td>• You Magazine</td>
</tr>
<tr>
<td>Outdoor Advertising</td>
<td>• Billboards welcoming visitors to “brand” at: N1,</td>
</tr>
<tr>
<td></td>
<td>Entrances to the area</td>
</tr>
<tr>
<td>Internet</td>
<td>• Currently under construction. Link to Tourgate and other provincial sites for maximum exposure</td>
</tr>
</tbody>
</table>

Consumer behaviour and travel distribution patterns are greatly influenced by the profile of the markets targeted. International consumers may buy a wholesale package from a local travel agent before leaving home, or book at their hotel’s tour
desk following their arrival. The booking may be channelled through an inbound tour operator or conference organizer. Consumers may have found the product on the Internet, in a guide book or received a recommendation from a friend.

- **Promotion**

Promoting the product to consumers and the travel trade requires an understanding of the target market and the most cost effective way to reach them. The promotional mix usually comprises a combination of:

*Advertising; print, radio, the internet, public relations; media releases*

Each option has its strengths and weaknesses. A good promotional strategy should include a mixture of promotional activities that can be refined.

Many destinations and operators choose to promote their product co-operatively through marketing opportunities offered, such as trade shows. Many of these opportunities are cost-effective and offer greater exposure and impact than activities undertaken by individual destinations, especially in the national and international market place.

No matter what promotion activities you choose, tracking the impact of your advertising spends is paramount. It will help you decide which campaigns to continue and which one’s need refinement.

- **Public Relations**

When executed well, public relations can be the most cost-effective segment in the promotional strategy. Media coverage can reach far more people than what the limited advertising budgets can afford. A media story may also be far more persuasive and in-depth than a small size advertisement. Consumers are more likely to be engaged by, and indeed trust, a first-hand account of a destination than they are by paid advertising.

Publicity from media campaigns and media familiarization tours is commonly described as ‘free’ because there is little cost involved compared to advertising.
Unlike advertising, however, there is no guarantee of placement or message and you still incur the cost of providing the service,

The key to success is developing ‘media ready’ materials that will encourage a journalist or an editor to write a feature on the area. The media looks for newsworthy stories that are new, different or unique, have ‘human interest’ element or provide eye catching and emotive visuals.

Modimolle Municipality must develop a media kit that includes key information, such as details about available accommodation, resorts, game farms and lodges and package tours offered, pricing, operating hours and contact information. Publicity is one element of an overall marketing plan and it should complement the total marketing mix and strategy.

- **Personal Selling**

There is nothing better than personal contact to build rapport with the market. Trade shows and sales missions are excellent opportunities to meet with a large number of targeted clients in one place at one time. Consumer and trade shows are open for attendance by the general public and a good opportunity to talk directly to the consumer.
10. Marketing Strategy

10.1 Vision
To be recognised as one of the premier tourism destinations in Limpopo

10.2 Mission
To market, facilitate, co-ordinate and implement marketing and product development programmes that will contribute to the social and economic growth of the Modimolle Municipal area.

10.3 Core Values
Customer driven
Quality of Service and Products
Accessibility
Sustainability
Skills Development
Business Excellence

10.4 Specific Objectives (Key Performance Areas)
Modimolle Municipality will strive to contribute to social and economic growth and transformation of the industry by:

- Create linkages with provincial and national tourism authorities
- Determine structure to manage strategy and capacitate management to implement roll-out. (Marketing & Development agency)
- Increasing tourist volumes, specifically day and weekend visitors
- Increasing length of stay
- Increasing tourist spending throughout the whole area
• Establishment of Tourism database to measure and manage performance (Link with Provincial).

Overall Objective:
• Promoting investment opportunities for SMME as well as the Private Sector.

Due to lack of an available tourism database for the municipality, no detailed statistics in terms of tourism volumes, length of stay and spending are available.

Based on the Limpopo Provincial statistics and objectives, targets should correspond with provincial targets.

10.5 Market Identification
What are the specific markets and segments that are most likely to be targeted?
From the research it is evident that most trips (49%) to Limpopo destinations in the last twelve months were for the purpose of visiting friends or relatives (VFR), followed by religion (28%) and holiday (15%). This is an important aspect in terms of determining the market. The Bushveld region (including Modimolle municipal area) received approximately 10% of visitors to Limpopo. Most trips to the study area were for the purpose of VFR (58.5%), followed by holiday and leisure (26.6%) and religion (7.6%)

It is interesting to note that most tourists were Limpopo residents (66.6%), followed by Gauteng residents (20%). 30% of tourists were 50 years and older. There is a very strong indication that in general, average occupation rates in the study area are below 45%. This sends a strong message that there is not a shortage of bed nights in the study area, but rather a lack of coordinated marketing to promote the area properly.
10.6 Branding Tourism in Modimolle

Main Theme

“MODIMOLLE ON THE MOVE”

Effort and resources must be focussed on branding the area as the gateway to the Waterberg meander and all its natural and other attractions. Modimolle Mountain can be used as the icon for the area. Focus must be on highlighting experiences in the different destinations i.e. Modimolle, Mabatlane and Mabaleng.

Sub-themes have been identified in the following areas and marketing and developments should be focussed on them:

- Outdoor Sport & Recreation
- Wildlife, Birding, Hunting and Safari’s
- Family and recreation
- Agri-Tourism
Modimolle area

Modimolle lacks the essential character and appeal of a holiday town. Special effort should be made by the municipality and the private sector to uphold the cleanliness of the town. An attractive Tourism Centre as well as a magnet in the form of shopping facilities, tourist shops and more restaurants will encourage tourists to spend more time and money in town. Municipal land next to the Nyl river seems to be the ideal location to create a “waterfront” attraction. Modimolle must develop into a tourist attraction in its own right. The all year round excellent malaria free climate is a major strength.

1. Outdoor Sport and Recreation

Current Gems

- Sky diving
- 4x4 Opportunities i.e. Aardwolf and off-roading (close to Gauteng)
- Cycling (Annual event)
- Canoeing, boating and fishing (Donkerpoort)
- Golf (To link up with BelaBela)
- Hiking trails (Link up with Mabatlane)

The Gap:

- 2010 Soccer World Cup
- No National/provincial events

Proposal:

- Liaise with SAFA and Provincial department of Sport, Arts and Culture to promote Modimolle as venue for sports training
- Market Modimolle as ideal location for spectators to use as base for planning their itinerary for 2010.
• Liaise with National and Provincial authorities to promote Modimolle as venue for sporting events in above mentioned sports

The message:
Promoting Modimolle as the ideal all year round sport and recreation location in SA. Proximity to Gauteng, the biggest market, is a major strength.

Implementation (Distribution of the message)
• See Appendix A

2. Wildlife, Birding, Hunting and Safari’s

Gems
• Modimolle Mountain
• Nylsvlei Nature Reserve and Wetlands
• Doorndraai Nature Reserve
• Other reserves
• Private Hunting Farms

Gap:
• No co-ordinated marketing
• Lack of proper day visitor facilities
• Lack of infrastructure to accommodate day visitors and weekend visitors (Roads, signage, water, camping etc.)

Opportunity:
• Investigate Day visitor facilities, recreational activities at Modimolle Mountain
• Link up with “Friends of Nylsvlei” and Provincial Tourism Board to promote Nylsvlei as world class bird watching opportunity.
• Market infrastructure development opportunities to private sector
• Market Hunting opportunities in liaison with private sector

The message:
Experience the thrill of ……..

- Wildlife
- Bird watching
- Hunting
- Game watching

Implementation (Distribution of the message)
• See Appendix A

3. Family and Recreation

Gems:
• Hot springs in the area
• Doorndraai Dam
• Middlefontein Development
• Donkerpoort Dam
• Caravan Parks (See appendix B)
• Nylsvlei Express

Gap:
• Occupation rate of less than 50%
• No co-ordinated marketing
• Lack of proper information and statistics on establishments (Database)
• Lack of Infrastructure to accommodate visitors
• No tourist magnet to attract visitors

Opportunity:
• Increase the occupation rate to 65% within 24 months
• Co-ordinated marketing of establishments
• Fast track the development of an informative web-site
• Link up with Provincial database and Tourgate to provide tourism information and accommodation
• Nylsvlei Nature Reserve
• Waterfront development next to the Nylriver (Magnet for the CBD)
• Development of the Middlefontein farms into a range of Leisure facilities. (Private Sector)
• Verloren Estate

The message:
Outdoor Family fun in the sun

Implementation (Distribution of the message)
• See Appendix A

4. Agri-Tourism

Gems:
• Extensive Grape farming (Grape Festival)
• Other soft fruits and vegetables

Gap:
• General public not informed of the extent of the industry and production processes (cultivation) in the area.
• Grape Festival not widely promoted

Opportunities:
• The municipality should develop a Grape Route (similar to the wine route in WC) in association with owners (PPP’s)
• Additional development opportunities for SMME’s can be established in this industry.
• Identify municipal/government/private land for the establishment of an upmarket lodge to accommodate foreign students and/or international visitors to work on grape and watermelon farms (See projects)
• Production of miniature vegetables and herbs

**The message:**
Fruit for thought.

**Implementation (Distribution of the message)**
• See Appendix A
**Mabatlane and the Mabaleng area**

Mabatlane is an important destination in the provincial *African Ivory Route* concept and is regarded as the centre for Game hunting and Safari holidays. A wide variety of private and public sector products exist within the area. Unfortunately the town has lost its attractiveness due to the unplanned informal sector development. Modimolle municipality must develop a “face lift” strategy in conjunction with the private sector and District Municipality. Mabatlane has the potential to become a highly visible destination in the area.

One of the biggest problems in this area is the fact that roads infrastructure and signage are very poor and needs to be upgraded.

Mabaleng is well known for game farming, herb production and flower cultivation.

1. **Outdoor Sport and Recreation**

**Current Gems**

- 4x4 Opportunities
- Hiking trails
- Hot air ballooning
- Helicopter trips
- Horse trails

**The Gap:**

- No co-ordinated marketing initiatives
- No National/provincial events

**Proposal:**
• Liaise with National and Provincial authorities to promote Modimolle (Mabatlane) as venue for sporting events in above mentioned sports
• Promote Golf Course development (Development of the Entabeni Golf Course)
• Promote Equestrian Events

The message:
Promoting Modimolle as the ideal all year round sport and recreation location in SA. Proximity to Gauteng, the biggest market, is a major strength.

Implementation (Distribution of the message)
• See Appendix A

2. Wildlife, Birding, Hunting and Safari’s

Gems:
• Waterberg Biosphere
  The greater majority of tourism development options and opportunities have already been identified and taken up by the private sector (Tourism Growth Strategy, Dept. of Economic Development, Environment and Tourism)
• 5 Star Lodges and Nature reserves
• Marakele Nature Reserve
• Game viewing
• Safari’s
• Game auctions.
  Annual provincial game auction, wildlife conference and outdoor exhibition attract visitors and business people country wide.
• Hunting

Gap:
• No co-ordinated marketing initiatives to create visibility
• Skills training and job creation for SMME

Opportunity:
• Development and privatisation of the Moepel farms. Promote the linkage between Moepel and the Waterberg Biosphere reserve to Provincial Government and special interest groups.
• Liaise with the provincial Department of Roads and Transport to prioritise road between Modimolle and Mabatlane for upgrading.
• Grow the occupancy rates of existing lodges by co-ordinated marketing initiatives
• Encourage length of stay and daily spend by offering more activities (Conference to encourage upgrading of facilities)
• Promote Mabatlane as excellent location for the film industry
• Create opportunities for value added products such as processing skins, horns etc for furniture and curio industry.
• Abattoir specialising in venison meats and products
• Investigate support of marketing programmes for the hunting industry.
• Skills training programme for the hunting industry

The message:
Experience the thrill of ……..

Wildlife
Bird watching
Hunting
Game watching

Implementation (Distribution of the message)
• See Appendix A

3. Family and Recreation
• Various Game farms and Lodges
• Biltong Festival

Gap:
• Low occupation rate in general
• Lack of day visitor facilities
• No Co-ordinated Marketing

Opportunities:
• Increase the occupation rate to 65% within 24 months
• Co-ordinated marketing of establishments
• Fast track the development of an informative web-site
• Link up with Provincial database and Tourgate to provide tourism information and accommodation
• Facelift of the Mabatlane town in general. Historical and cultural attributes need to be upgraded and marketed.
• Market cultural experiences if the area through the website and tourism publications

The message:
Outdoor Family fun in the sun

Implementation (Distribution of the message)
• See Appendix A

4. Agri-Tourism

Gems:
• Herb production
• Grape farming
• Flower production (Mabaleng)
• Cheese making (Goats milk)
Gap:
• Not well known

Opportunities:
• Link up with Modimolle to be included in the development of a Grape route
• Encourage private sector to increase production of herbs and establish sales distribution points. Possible job creation for new entrants.
• Promote Rose farms as visitor’s attraction.
• Promote goats cheese making as a visitor’s attraction

The message:
Fruit for thought.

Implementation (Distribution of the message)
• See Appendix A
11. Suggested implementation schedule: (Proposed 12 month roll-out plan)

The following suggested implementation schedule is only an indication of the order and priority in which the processes should take place. Timeframes and budget to be established and confirmed by the Municipality.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Medium</th>
<th>Timeframe</th>
<th>Responsibility</th>
<th>Estimated Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Est. a Marketing organisation</td>
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<td>Jan 2006</td>
<td>Municipality</td>
<td>N/A</td>
</tr>
<tr>
<td>Image and message creation</td>
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<td>Feb 2006</td>
<td>Municipality</td>
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<tr>
<td>Advertising</td>
<td>Print: (12 months) - Getaway - You - Sowetan - Provincial newspapers</td>
<td>Monthly Monthly Monthly Monthly</td>
<td>Marketing Org.</td>
<td>R60,000 R60,000 R60,000 R20,000</td>
</tr>
<tr>
<td>Radio: (3 months) - Jacaranda - Metro - Highveld - Thobela/Phala Phala/Munghana</td>
<td>Weekly for 3 months</td>
<td>Marketing Org.</td>
<td>R45,000 R45,000 R45,000 R30,000</td>
<td></td>
</tr>
<tr>
<td>Billboards - N1, 4x entrances</td>
<td>Once off</td>
<td>Marketing Org.</td>
<td>R50,000</td>
<td></td>
</tr>
<tr>
<td>Image Creation</td>
<td>Brochure: Colour A4 (8 pages incl. Cover) 5,000 copies</td>
<td>Annually</td>
<td>Marketing Org.</td>
<td>+/- R40,000</td>
</tr>
<tr>
<td>Fast tracking of Web-site implementation</td>
<td>Internet</td>
<td>Ongoing</td>
<td>Marketing Org.</td>
<td>N/A</td>
</tr>
<tr>
<td>Create online information database for accommodation &amp; General info/stats</td>
<td>Internet</td>
<td>Once off</td>
<td>Marketing Org.</td>
<td>R50,000</td>
</tr>
<tr>
<td>Promotion</td>
<td>Magazines &amp; Newspapers</td>
<td>Ongoing</td>
<td>Marketing Org.</td>
<td>Free</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-------------------------</td>
<td>---------</td>
<td>----------------</td>
<td>------</td>
</tr>
<tr>
<td>Public Relations</td>
<td>All Media:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>National and Provincial</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>decision makers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Road Show</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Marketing Org</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Mayor and MM</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Shows and Exhibitions</td>
<td>Ongoing</td>
<td>Marketing Org</td>
<td>R30,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Estimated Cost</strong></td>
<td></td>
<td></td>
<td></td>
<td>R710,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
12. Proposed structure to implement the Marketing Strategy

The proposed structure for managing tourism marketing and development, as well as other sectoral development within the framework of regional economic development (Destination Development & Marketing Organisation - DDMO) is as follow:

[Diagram of proposed structure]

- SA Tourism Board
- Limpopo Tourism Board
- Destination Development & Marketing Organisation
- Modimolle Tourism Association
- Vaalwater Tourism Association
- Other Tourism Associations
- Municipalities
- Private Sector
- Community Involvement
Role of a DDMO
- Co-ordinated Destination development & marketing
- Tourism business and other sectoral business development
- Source funding from participating structures, IDT, private sector, etc.
- Vision management: "... To provide the best tourism offer in Limpopo..."
- Strategy management
- Organisational Management

Main Objective
- Destination Development and Management

Central role
- Strong sense of purpose, clearly stated SHARED VISION necessary for effective management
- NO effective management – NO Competition
- Focus on establishing and maintaining competitive advantage for the region
- Actions to be directly connected to strategic purpose, which is economic growth and empowerment
- The DDMO structure must be BROADLY OWNED and must service the bigger region
- Must establish LINKAGES and create NETWORKS with provincial and national structures
- The strategy must be ANNUALLY refreshed
13. Projects

1. **Project name: Doorndraai Dam Nature Reserve**

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Size of the reserve</td>
<td>+/- 7000ha including the Doringdraai dam</td>
</tr>
<tr>
<td>Location</td>
<td>Foot slopes of the Waterberg mountain range approx. 20 km east from the N1 and 75km north-east of Modimolle, bordering the Waterberg biosphere reserve</td>
</tr>
<tr>
<td>Topography</td>
<td>Grassland and open savanna habitats below the dam. Wall, rock and riverine habitants around the dam</td>
</tr>
<tr>
<td>Climate</td>
<td>Medium rainfall (+/- 500mm). Hot summers, mild winters – malaria free</td>
</tr>
<tr>
<td>Unique and special features</td>
<td>Renowned Birding site and prime angling spot. Well known for water based activities.</td>
</tr>
<tr>
<td>Current utilization</td>
<td>Medium intensity water based activities</td>
</tr>
<tr>
<td>Utilization Potential</td>
<td>Leisure and outdoor related development such as a Leisure village i.e. camping, up market caravan park and lodge related development</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access</td>
<td>Easy access from the N1. Large sections of gravel road in a fair to poor state</td>
</tr>
<tr>
<td>Proximity to established tourism destination</td>
<td>Close to Mokopane and Waterberg biosphere</td>
</tr>
<tr>
<td>Competition</td>
<td>Will have to compete with established venues and lodges in the area</td>
</tr>
<tr>
<td>Current demand</td>
<td>Will attract day visitors, campers and anglers (current) Demand will have to be created (marketing)</td>
</tr>
<tr>
<td>Approx. Investment Cost</td>
<td>R15m</td>
</tr>
</tbody>
</table>
## 2. Project name: Donkerpoort Dam Reserve

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Size of the reserve</td>
<td>To be confirmed by the municipality</td>
</tr>
<tr>
<td>Location</td>
<td>Foot slopes of the Waterberg mountain range approx. 12 km east from Modimolle on the R33</td>
</tr>
<tr>
<td>Topography</td>
<td>Small portions grassland around the dam, including wall, rock and riverine habitats.</td>
</tr>
<tr>
<td>Climate</td>
<td>Medium rainfall (+/- 550mm). Hot summers, mild winters – malaria free</td>
</tr>
<tr>
<td>Game and Birdlife</td>
<td>Large variety of birdlife, typical of the area.</td>
</tr>
<tr>
<td>Unique and special features</td>
<td>Well-known angling spot. Popular for water based activities.</td>
</tr>
<tr>
<td>Current utilization</td>
<td>Low intensity water based activities. Facilities in a poor state.</td>
</tr>
<tr>
<td>Utilization Potential</td>
<td>Leisure and outdoor related development such as a caravan park and day visitor facilities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access</td>
<td>Easy access from the Modimolle / Mabatlane road. Approx. 8 km of gravel road in a fair state</td>
</tr>
<tr>
<td>Proximity to established tourism destination</td>
<td>Close to Weesgerus Holiday Resort</td>
</tr>
<tr>
<td>Competition</td>
<td>Will have to compete with established venues in the area</td>
</tr>
<tr>
<td>Current and future demand</td>
<td>Will attract day visitors, campers and anglers (current) Demand will have to be created (marketing)</td>
</tr>
<tr>
<td>Approx. Investment Cost</td>
<td>R3m – R4m</td>
</tr>
</tbody>
</table>
3. Project name:
Middlefontein Lodge development on land adjacent to link of N1 & R101 (claimed land) JV between community & Private sector

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Size of the reserve</td>
<td>Total size of land: 12,381ha</td>
</tr>
<tr>
<td>Location</td>
<td>Both sides of the N1 approx 25km east of Modimolle. The bulk of the land is located on the western side of the N1 stretching towards the foot slopes of the Waterberg mountain range</td>
</tr>
<tr>
<td>Topography</td>
<td>Grassland and typical bushveld open savanna habitats, including a portion of the Nylsvlei. To the west of the N1 the land is mountainous.</td>
</tr>
<tr>
<td>Climate</td>
<td>Medium rainfall (+/- 550mm). Hot summers, mild winters – malaria free</td>
</tr>
<tr>
<td>Game</td>
<td>Common species – Kudu, Bushbuck, Blue Wildebeest, Impala, Duiker, Waterbuck, Zebra, Giraffe, Warthog occur on fenced in portions of the land</td>
</tr>
<tr>
<td>Unique and special features</td>
<td>Bird watching at Nylsvlei</td>
</tr>
<tr>
<td>Current utilization</td>
<td>Various. From game farming, caravan park to cattle farming and Hiking trails</td>
</tr>
<tr>
<td>Utilization Potential</td>
<td>Leisure and outdoor related development such as a Leisure village i.e. camping, up market caravan park and lodge related development. Master plan in development phase.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access</td>
<td>Easy access from the N1 and the R101. Large sections of gravel road in a fair state</td>
</tr>
<tr>
<td>Proximity to established tourism destination</td>
<td>Close to hot water spring resorts</td>
</tr>
<tr>
<td>Competition</td>
<td>Will have to compete with established venues and lodges in the area</td>
</tr>
<tr>
<td>Current demand</td>
<td>Will attract day visitors, campers, travellers, holiday makers. Demand will have to be created (marketing)</td>
</tr>
<tr>
<td>Approx. Investment Cost</td>
<td>R10m – R12m</td>
</tr>
</tbody>
</table>
4. **Project name: Development of a lodge on municipal / community land (NEW)**  
**Project Description:** To accommodate foreign students to work on grape, watermelon and other farms. Students will pay for the opportunity to enjoy a working holiday (PPP Project)

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Modimolle</td>
</tr>
</tbody>
</table>
| Unique and special features| Training in eco and wildlife skills. Education centre for local scholars and overseas students.  
Exchange scheme between local and overseas students to experience different lifestyle & cultures. Students from overseas will pay for a working holiday and the demand is very high.  
This centre could be utilised for conferences and training of tourism related skills i.e. hotel and food industry |
| Funding                    | Funds to establish this project can be sourced from the EU.                                                                                                                                               |
5. **Project name: Waterberg Meander Train route (Revival)**

**Project Description:** Revival of a tourism train route between Modimolle and Mabatlane.

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Modimolle to Mabatlane</td>
</tr>
<tr>
<td>Unique and special features</td>
<td>The existing railway line between the 2 towns follows a mountainous and scenic route.</td>
</tr>
<tr>
<td></td>
<td>The development of new mining activities at Lephalale is going to necessitate upgrading and development of the railway line from the Coal fields to Witbank area via Modimolle. (shortest route)</td>
</tr>
<tr>
<td></td>
<td>This project could lead to the upgrading of both Modimolle and Mabatlane stations. In the case of Mabatlane this could lead to the creation of a magnet and the facelift of the town.</td>
</tr>
<tr>
<td></td>
<td>Stopovers combined with smaller community projects could be created along the route.</td>
</tr>
<tr>
<td>Funding</td>
<td>The private sector could be engaged through a tender process.</td>
</tr>
<tr>
<td></td>
<td>Funds for skills development for the secondary projects can be sourced from the EU.</td>
</tr>
</tbody>
</table>
6. **Project name:** Development of a Grape Route  
**Project Description:** Development of a route visiting all the major Grape farms experiencing production and processing of grapes. This can be linked to the establishment of a home industry where locals can sell products.

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Modimolle Municipal area</td>
</tr>
<tr>
<td>Unique and special features</td>
<td>Development of a route visiting all the major Grape farms experiencing production and processing of grapes. This can be linked to the establishment of a home industry along the route where home industry products can be sold i.e. cheese, jam, mampoer.</td>
</tr>
<tr>
<td>Funding</td>
<td>Funds to establish this project can be sourced from the EU.</td>
</tr>
</tbody>
</table>
7. **Project name: Modimolle Waterfront Development**  
**Project Description:** Development of a shopping centre, restaurants and curio shops next to the Nyl river in town. Proposal call for potential developers to indicate their interest.

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Modimolle Municipal land</td>
</tr>
<tr>
<td>Unique and special features</td>
<td>Development of a magnet for the town in the form of a tourist shopping facility i.e. restaurants &amp; curio shops. Sell also goods and curios from the area. The Tourism Marketing and information centre will be hosted at this venue for maximum exposure. The setting on the banks of the Nyl river will contribute to the ambience of the development.</td>
</tr>
<tr>
<td>Funding</td>
<td>Private sector to be invited to submit development proposal with costing</td>
</tr>
</tbody>
</table>
8. **Project name: Facelift for Mabatlane**  
**Project Description:** Revamping and facelift of the Mabatlane town

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Mabatlane</td>
</tr>
<tr>
<td>Unique and special features</td>
<td>Enhance the look of the town to attract more tourists and establish it as the international Game auction Hub of the Gaming industry. Develop proper infrastructure i.e. Conference and accommodation facilities to provide for this industry. Investigate feasibility and need for a tarred airstrip. Other community related projects such as processing of hides and skins into furniture and other goods can be attracted to the area</td>
</tr>
<tr>
<td>Funding</td>
<td>Municipality and District municipality to engage private sector in planning.</td>
</tr>
</tbody>
</table>
9. **Project name:** Skills Development Training programme (new)
   **Project Description:** Skills training to produce home made products from wood, metal, paper and other materials.

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Modimolle Municipal area</td>
</tr>
<tr>
<td>Unique and special features</td>
<td>Skills programme and curio making to be combined with an open market where handmade articles, home industry goods and fresh produce can be sold.</td>
</tr>
<tr>
<td>Funding</td>
<td>African millennium foundation/ EU</td>
</tr>
</tbody>
</table>
10. **Project name: Modimolle Mountain (new)**  
**Project Description:** Day visitor related infrastructure

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Modimolle Municipal area</td>
</tr>
<tr>
<td>Unique and special features</td>
<td>This centrally located mountain has the potential to attract large numbers of day visitors from the province and Gauteng. Investigate the development of facilities such as picnic spots, hiking routes, lookouts. The construction of a cable way to the top of the mountain must be investigated.</td>
</tr>
<tr>
<td>Funding</td>
<td>EU (business plan)</td>
</tr>
</tbody>
</table>
14. References

1. Limpopo Growth and Development Strategy, January 2005
3. Domestic Tourism Report, SA Tourism Strategic Research Unit, April 2004
4. Modimolle Integrated Development Plan, June 2004
8. Waterberg District Municipality: Local Economic Development Plan, 2004
10. A Tourism Growth Strategy for Limpopo Province, DFED, 2004
12. DEAT see DEPARTMENT OF ENVIRONMENTAL AFFAIRS AND TOURISM.
17. MUNICIPAL STRUCTURES ACT 117 see SOUTH AFRICA

18. MUNICIPAL SYSTEMS ACT 32 see SOUTH AFRICA


32. STRISA see THE SUSTAINABLE TOURISM RESEARCH INSTITUTE OF SOUTHERN AFRICA CC

34. VEZA see VISIT & EXPLORE SOUTH AFRICA.

35. VISIT & EXPLORE SOUTH AFRICA. [CD-ROM].

36. WTO see WORLD TOURISM ORGANISATION


This document has been compiled by:

Ikando (Pty) Ltd, t/a iTMaster

In association with:

University of Pretoria - Tourism Department
Tourgate
## 15. Appendix A – Marketing detail

<table>
<thead>
<tr>
<th>Medium</th>
<th>Media</th>
<th>Themes/Gem/Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>• Trade magazines (i.e. Getaway, Wild &amp; Game, etc.</td>
<td>• Outdoor sport and recreation</td>
</tr>
<tr>
<td></td>
<td>• Provincial Newspapers</td>
<td>• Birding</td>
</tr>
<tr>
<td></td>
<td>• Weekend Newspapers</td>
<td>• Hunting &amp; Safari’s</td>
</tr>
<tr>
<td></td>
<td>• You Magazine</td>
<td>• Family and recreation</td>
</tr>
<tr>
<td></td>
<td>• Sowetan</td>
<td>• Family and recreation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Family and recreation</td>
</tr>
<tr>
<td>Internet</td>
<td>• All well known search engines</td>
<td>• All Themes and Projects</td>
</tr>
<tr>
<td>Outdoor advertising</td>
<td>• Billboards welcoming visitors at N1 tollgate and entrances to town</td>
<td>• Main Theme</td>
</tr>
<tr>
<td>Poster, Posters</td>
<td></td>
<td>• “Modimolle on the move”</td>
</tr>
<tr>
<td>Radio</td>
<td>• Radio Jacaranda</td>
<td>• All special events</td>
</tr>
<tr>
<td></td>
<td>• Highveld 94.7</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Radio Metro</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Thobela FM</td>
<td></td>
</tr>
<tr>
<td>Public Relations</td>
<td>• Liaise with Provincial dept’s and authorities</td>
<td>• All themes and projects</td>
</tr>
<tr>
<td></td>
<td>• Liaise with National dept’s and authorities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Liaise with potential Investors</td>
<td></td>
</tr>
<tr>
<td>Personal Selling</td>
<td>• Outdoor Exhibitions</td>
<td>• Promote region’s generic advantages and gems</td>
</tr>
<tr>
<td></td>
<td>• Provincial Exhibitions</td>
<td></td>
</tr>
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<td></td>
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<td>----------</td>
<td>-----------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td></td>
<td>International Exhibitions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(in collaboration with TIL, Parks &amp; Tourism Board)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>National Exhibitions</td>
<td></td>
</tr>
</tbody>
</table>
16. Appendix B – List of establishments