

N2 WILD COAST BIODIVERSITY OFFSET PROJECT

Offset Implementation Management Series

Report 5:

Tourism Implementation Plan



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SUBMISSION

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ABBREVIATIONS

CATHSETTA	Culture, Art, Tourism, Hospitality, and Sport Sector Education and Training Authority
DEDEAT	Department of Economic Development Environmental Affairs and Tourism
ECDC	Eastern Cape Development Corporation
ECRDA	Eastern Cape Rural Development Agency
ECPTA	Eastern Cape Parks and Tourism Agency
ECSECC	Eastern Cape Socio-Economic Council
EIA	Environmental Impact Assessment
DEFF	Department of Environment Forestry and Fisheries
DPW	Department of Public Works
DSL	Department of Safety and Liaison
GTAC	Government Technical Advisory Centre
IDPs	Integrated Development Plans
DT	Department of Tourism
NYDA	National Youth Development Agency
PMU	Project Management Unit
PPP	Public-Private Partnerships
S&A	Sigwela and Associates
SANRAL	South African Roads Agency SOC Limited
SAPS	South African Police Service
SAT	South African Tourism
SDFs	Spatial Development Frameworks
SEDA	Small Enterprise Development Agency
SMME	Small Micro and Medium Enterprise
TGSA	Tourism Grading Council of South Africa
WESSA	Wildlife and Environment Society of South Africa

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INTRODUCTION AND BACKGROUND

The South African Roads Agency SOC Limited (SANRAL) is constructing the “new” N2 Road along the Wild Coast in the Eastern Cape. To mitigate the anticipated environmental impacts described in the Environmental Impacts Assessment reports, the Department of Environmental Affairs Record of Decision (April 2010) required the establishment of biodiversity offsets. In this Wild Coast Biodiversity Offset Project (hereafter the ‘Project’), offsets will be sites that will be proclaimed as Nature Reserves or Protected Environments in terms of sections 23 and 28 of the NEM: Protected Areas Act (2003).

SANRAL appointed the Eastern Cape Parks and Tourism Agency (ECPTA) to implement the Project for a period of ten (10) years on the offset sites identified by Botha and Brownlie (2014). The ECPTA’s key mandate within the Project is to ensure that these sites are declared in terms of the NEM: Protected Areas Act (2003), with an appropriate implementation plan with spatial management objectives, responsibilities, budgets, and timeframes. Sigwela and Associates (S&A) were contracted by the ECPTA to undertake the first phase of the Project with the purpose of developing the various implementation management plans that is the focus of this report series.

Considerable work was done to assess the biodiversity, agricultural, economic, and other aspects of these sites during the initial phases of the Project, resulting in a variety of reports such as the “Site Assessment Report”. During this process there was considerable engagement with the affected communities living in and around the proposed offsets. The 14 sites are grouped into three loose geographic areas: The northern Mkhambati-Ntentule Cluster, the central Lambasi-Ntsubane Cluster, and the southern Mount Thesiger-Caguba Cluster (see Figure 1).

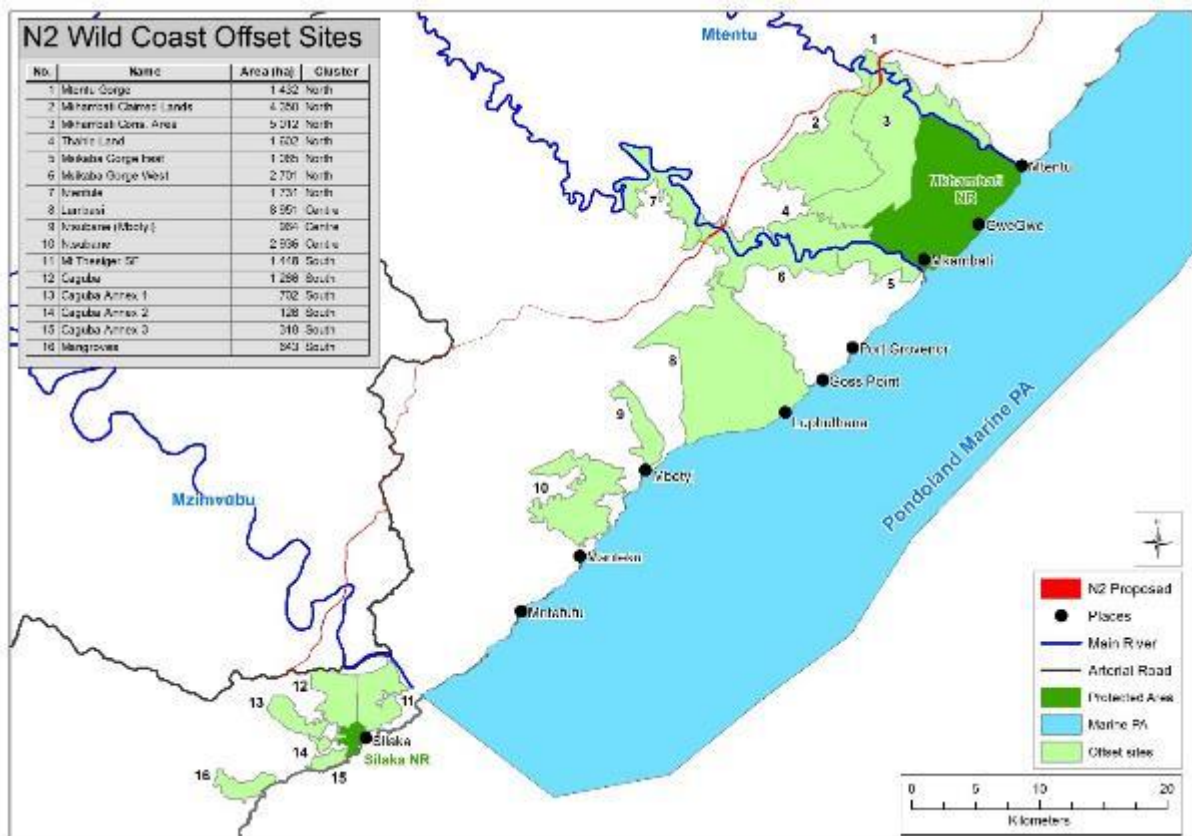


Figure 1 The general context of the offset sites

Against this background, the broad Tourism Implementation Plan is presented here as part of the contractual obligation of the ECPTA to SANRAL. This Implementation Plan is designed to provide guidance and strategic direction on the management of the tourism component of the Project. It integrates and harmonises existing local tourism plans for the Port St. Johns and Ingquza Hill Local municipalities, responsible tourism, and ecosystem management principles (see Report 3 in this series), recognising the strong links between tourism and natural heritage.

The Plan guides the implementation of tourism across the project area focusing on environmentally and socially responsible tourism that supports biodiversity conservation. It recognises the invaluable contribution of tourism to the achievement of biodiversity targets, and the threat to natural resources caused by poorly managed and inappropriate tourism developments. It therefore advocates for proactive mitigation of any adverse effects of tourism developments on biodiversity.

The project area is surrounded by low income communities with varying degrees of poverty indices. Trade-offs and potential synergies exist between optimising for income from tourism and delivering benefits, building, and maintaining a healthy relationship with communities. It is therefore imperative that empowerment of the marginalised and poor communities is a priority in the implementation plan. It also supports product-based marketing with a bias on visitor needs and expectations as well as market-based product development.

Approach

This plan adopts a coordinated, participatory approach involving communities, traditional leadership, the tourism industry, government, and other important stakeholders. It is characterised by active and direct participation of communities and critical stakeholders in all stages of its development, and such participation should continue into the implementation phase. It incorporated other local planning processes such as Spatial Development Frameworks (SDFs) for the municipalities, Integrated Development Plans (IDPs), Environmental Management Plans, Biodiversity Plans, Coastal Management Plans, and Local Tourism Sector plans. Further, it is aligned with principles of eco-based tourism, responsible tourism, and sustainable tourism. This implementation plan is structurally aligned with the National Destination Management Manual (2018), with sections on:

- a) Research
- b) Opportunities and Threats
- c) Action Plans
- d) Implementation and Monitoring
- e) Institutional Arrangements
- f) Concluding Remarks

RESEARCH

The research conducted for this study was undertaken during the situational analysis phase of the N2 Wild Coast Biodiversity Offset Project. Secondary data was obtained from the 2019 Socio-Economic Surveys of the two local municipalities (Ingquza Hill Local Municipality and Port St Johns Local Municipality), documentation review, telephonic consultations with relevant stakeholders as well as through internet research. The research does not include primary tourism surveys, which is a large body of specialist work that was beyond the scope of this project.

Review of legislative and administrative frameworks

Existing legislative and administrative frameworks with a direct impact on the Biodiversity Offset Tourism Implementation Plan were reviewed to gain a broad overview of tourism in the planning domain and to ensure alignment. Listed below are the relevant documents that were reviewed:

- a) White Paper on the Development and Promotion of Tourism in South Africa, 1996: This is a founding policy for tourism in South Africa which provides a framework and guide on tourism development and promotion
- b) Wild Coast Tourism Policy, 2001: This policy is designed to promote, facilitate and regulate tourism development in the Wild Coast.
- c) Wild Coast Environmental Management Plan, 2014: This is a provincial planning instrument to guide and facilitate development for sustainable use of the Wild Coast. Both the Wild Coast Tourism Policy and the Wild Coast Environmental Management are key in determining the nature and the magnitude of tourism developments in the planning domain
- d) Tourism Act 3 of 2014: The Act provides guidance on the development and promotion of sustainable tourism for the benefit of the Republic, its residents, and its visitors
- e) South African National Minimum Standard for Responsible Tourism (SANS 1162), 2011: This provides tools with which people and organisations in the travel and tourism sector can enhance their business activities while simultaneously expanding the socio-economic benefits of tourism for local stakeholders, including but not limited to employees, suppliers and neighbouring communities.
- f) Tourism Destination Planning Manual, 2018: The Manual provides planning support to all tourism planners and practitioners in the tourism industry.
- g) The 2026 National Tourism Sector Strategy, 2020 Eastern Cape Tourism Master Plan, 2017 OR Tambo Master Plan, 2012 Ingquza Hill Tourism Sector Plan and Port St Johns Master Plan: All these strategic frameworks provide a structural framework for the development, management and monitoring of tourism in a destination. They also reflect tourism support programmes that are provided both at national, provincial, and local government level which could be used as part of resource mobilisation in the execution of the plan.
- h) 2020 Integrated Development Plans for OR Tambo District Municipality, Port St Johns and Ingquza Hill Municipalities

Review of cultural and socio-economic context

A very broad review of the cultural and socio-economic context of the planning domain (which refers to the tourism potential sites identified at Port St Johns and Ingquza Hill Local Municipalities) is well articulated in the Situational Analysis Report which is part of the planning documents of the Biodiversity Offset Project. The Situational Analysis Report affirms the significance of culture in Pondoland, and how it can be used to diversify tourism offerings through the development and enhancement of heritage resources while encouraging the development of arts, crafts and creative industries which are main economic activities in the Planning Domain. Engagement with the stakeholders revealed that most art and craft products produced in this area are not informed by customer needs and expectations hence they end up with stock that cannot be sold. The significance of heritage/ cultural tourism cannot be underestimated in the Planning Domain. One example of such heritage tourism is aligned with the history of shipwrecks. Port St Johns was named after the wreck of the Portuguese

ship, Sao Joao in the sixteenth century. Two more shipwrecks were recorded in Grosvenor and Msikaba in the fifteenth and sixteenth century and there are two lighthouses in Port St Johns. This Tourism Implementation Plan therefore creates a platform to identify the opportunities to develop innovative and creative models to realize the huge potential of cultural tourism to build inclusive economic growth and preserve culture.

The socio-economic profile presented in the Situational Analysis Report shows that the Project area has high levels of unemployment and most people depend on government grants, with the youth being worst off. This implies that the Implementation Plan should enhance opportunities for existing employment and skills development programmes whilst facilitating new opportunities from the planned and potential development projects in the Planning Domain. To minimise economic leakage from the community, locally produced goods and employment of locals is encouraged and it will be necessary to develop competencies and skills based on the projects that are to be implemented locally.

Tourism Stakeholder Analysis

Before starting the plan, it was necessary to understand the relevant or critical stakeholders that need to be consulted or be involved during the entire cycle of the development of the implementation plan as they have prominent roles and responsibilities in planning and implementation (Table 1).

Table 1. Key stakeholders for a tourism implementation plan

Stakeholder	Roles and Responsibilities
Eastern Cape Parks and Tourism Agency	<ul style="list-style-type: none"> • Tourism Development • Destination and Marketing • Biodiversity management • Implementing agent for the biodiversity offset project
Department of Tourism	<ul style="list-style-type: none"> • Facilitation and implementation • Co-ordination with international, regional, and provincial government • Planning and policy-making • Development promotion
Department of Environmental Affairs	<ul style="list-style-type: none"> • Conservation and Biodiversity Management
Department of Co-operative Government and Traditional Affairs	<ul style="list-style-type: none"> • Engagement with Traditional Authorities • Community Resolution
Department of Economic Development, Environment and Tourism	<ul style="list-style-type: none"> • Planning and policy making • Conservation management • Tourism development • Regulation and monitoring
Eastern Cape Development Corporation	<ul style="list-style-type: none"> • Tourism Investment • Commercial Film and Television Production • Arts and Craft (Market Access and influencing product development)
Eastern Cape Rural Development Agency (ECRDA)	<ul style="list-style-type: none"> • Rural Tourism • Magwa- Majola - Lambasi Agri-tourism corridor • Development of Magwa Falls
Eastern Cape Provincial Arts and Culture Council (ECPACC)	<ul style="list-style-type: none"> • Locations Catalogue • Film production
OR Tambo District Municipality Ingquza Hill Local Municipality Port St Johns Municipality	<ul style="list-style-type: none"> • Land use planning and control over land use and land allocation • Provision and maintenance of tourist services, sites and attractions • Marketing of specific local attractions

	<ul style="list-style-type: none"> • Facilitation of local community participation in the tourism industry Ownership and maintenance of certain plant (e.g. ports and airports) • Facilitate establishment of public transport Licenses, in line with a national framework Promote and financially support local publicity association
Private Sector (Wild Coast Tourism Association, Wild Coast Holiday Association, Port St Johns Tourism Forum)	<ul style="list-style-type: none"> • Product development • Collaborative marketing • Route Development particularly the new ones linking the N2 Toll Road • Involve local communities in establishing partnerships, purchase of goods and services from communities and employment of local labour • Business Surveys
Film Makers	<ul style="list-style-type: none"> • Film Production
SANRAL	<ul style="list-style-type: none"> • Developer of N2 Wild Coast Toll Road
Eastern Cape Socio-economic Council	<ul style="list-style-type: none"> • N2 Corridor • Oceans Economy • Research (Socio-economic Profile)
Local Communities	<ul style="list-style-type: none"> • Organise themselves to play a more effective role in the tourism industry and interact with government and role players at all levels • Identify potential tourism resources and attractions • Support and promote responsible tourism and sustainable development • Participate in decision-making with respect to major tourism developments planned or proposed for the area
Visitors	<ul style="list-style-type: none"> • Provide information during data collection (visitor surveys) • Add greatly to the availability of local knowledge on tourism

The Tourism Market (Demand Analysis)

To undertake a formal and informed market analysis, it was important to review the current drivers of tourism demand at regional level as well as at the local level. Further, current markets and their performance were reviewed through evaluating customer views and opinions about some destinations, community engagement (using a questionnaire) and the Trip Advisor platform. Tourism data for both municipalities was obtained from the 2019 Socio-economic Survey, which reflects 2018 data. Naturally, these data are very different to the current Covid-19 situation, but the trends are still valid to a degree.

Port St Johns Local Municipality

Visitor Arrivals

- Visits to Friends and Relatives (VFR) tourism was 83 900 and had an average annual growth rate of 3.98%
- Other (Medical, Religious, etc) tourism had the second highest share at 15.50%,
- Leisure / Holiday tourism at 7.23% with an average annual growth rate of -7.68% from 2008 (18 400) to 2018 (8 250). There was no research information to further understand the contributory factors that led to the decrease of leisure tourism, however, engagements with the tourism stakeholders attributed this to poor access to the Wild Coast, safety and security particularly crime as well as drownings in the Port St Johns beaches.

- Business tourism had the smallest share of 3.72% of the total tourism within Port St Johns Local Municipality. Port St Johns has inadequate conferencing / meeting facilities and this might be the cause to the low numbers in business tourists.

Origin

- The number of trips by tourists visiting Port St Johns Local Municipality from other regions in South Africa has increased at an average annual rate of 1.28% from 2008 (92 800) to 2018 (105 000).
- The tourists visiting from other countries increased at a relatively high average annual growth rate of 7.10% (from 4 390 in 2008 to 8 730).
- International tourists constitute 7.65% of the total number of trips, with domestic tourism representing the balance of 92.35%.

Bed nights

- From 2008 to 2018, the number of bed nights has decreased at an average annual rate of -4.27%
- The international tourists had an average annual increase of 9.79%.

Spend

- Port St Johns Local Municipality had a total tourism spending of R 391 million in 2018 with an average annual growth rate of 7.7% since 2008 (R 185 million).

Average Spend

- A total per capita spending of R 2,300 which reflects an average annual increase of 6.64% from 2008 was recorded. Port St Johns Municipality ranked first in terms of tourism spend per capita in the OR Tambo District Municipality.

Tourism spend as share of GDP

- In 2018, tourism spending as a percentage of GDP was 15,24%

Ingquza Hill Local Municipality

Visitor Arrivals

- Visits to Friends and Relatives (VFR) recorded the highest number of visits in 2018 at 40 500, with an average annual growth rate of -7.87%.
- Other (Medical, Religious, etc) tourism had the second highest share at 24.44%, followed by Leisure / Holiday tourism at 3.35%.
- The Business tourism had the smallest share of 1.77% of the total tourism within Ingquza Hill Local Municipality.

Origin

- The number of trips by tourists visiting Ingquza Hill Local Municipality from other regions in South Africa has decreased at an average annual rate of -6.60% from 2008 (107 000) to 2018 (54 100).
- The tourists visiting from other countries decreased at an average annual growth rate of 1.39% (from 2 970 in 2008 to 3 410).
- International tourists constitute 5.93% of the total number of trips, with domestic tourism representing the balance of 94.07%.

Bed nights

- From 2008 to 2018, the number of bed nights spent by domestic tourists has decreased at an average annual rate of -11.89%
- International tourists had an average annual increase of 2.68%.

- The total number of bed nights spent by tourists decreased at an average annual growth rate of -10.40% from 741 000 in 2008 to 247 000 in 2018.

Spend

- A total tourism spending of R 166 million in 2018 with an average annual growth rate of -0.3% since 2008 (R 171 million).

Average Spend

- A tourism spend per capita of R 536 and an average annual growth rate of -1.57%
- Ingquza Hill Local Municipality ranked third amongst all the regions within O.R. Tambo in terms of tourism spend per capita

Tourism spend as share of GDP

- In Ingquza Hill Local Municipality the tourism spending as a percentage of GDP in 2018 was 4.20%. Tourism spending as a percentage of GDP for 2018 was 3.50% in O.R. Tambo District Municipality, 4.17% in Eastern Cape Province. Looking at South Africa as a whole, it can be seen that total tourism spending had a total percentage share of GDP of 5.89%.

Visitor Profile

Visitors to the two municipalities include leisure and business travellers, from domestic and international markets. The profile of these visitors, derived from the Tourism Sector Plans of the Local Municipalities, is summarized as follows:

- Leisure Tourists (Domestic) predominantly make use of private accommodation while those Visiting, Friends and Relatives (VFR's) stay with families. The Coast is mainly a honeymoon spot, budget friendly, adventurous, adrenalin seekers, events, and festivals.
- Leisure Tourists (International) comprise mainly of independent travellers, with a relatively small number of small/medium tour groups. International leisure travel is generally spread from February to October. The main source markets include Europe (UK, Germany, Netherlands) and Canada.
- Business Tourists (Domestic) are predominantly from the domestic markets and include contractors working on infrastructure projects, government personnel attending meetings staying for an average of two days. Business travel is generally evenly distributed throughout the year, except for the December/January period as most government employees go on holiday. This also refers to students doing research studies particularly in the Mkambati area and those attending Career Expos especially in Port St Johns.
- Business Tourists (International): Port St Johns attracts international business travellers in the film industry, although this is not presently a steady/predictable supply. International business travellers could generally be in evidence at any time of the year except during the peak leisure seasons of April and December/January.

Potential new markets

Listed below are the identified new/emerging market segments which should be targeted in the planning domain and be included in the marketing plan. Some of these market segments are outlined in the South African Tourism Strategy.

- High life enthusiasts: This segment relates to travellers that want to boost their social status, and to experience the finer things in life in new and different settings

- Adrenalin Seekers: This segment relates to TV shows, specialised magazines interested in adventure, excitement and experiencing unspoiled nature
- Spiritual Travellers: These are religious groups that want to hold their spiritual retreats away from the busy life
- Spontaneous budget explorers: This segment relates to travellers who want to discover new people, places and adventures.
- New Horizon Families: This segment is interested to educate their children, and to provide them with the opportunity to broaden their perspectives.
- Seasoned leisure seekers: Having grown up going on regular holidays, this group of consumers understands the value of travel experiences and memories over commodities
- Well to do Mzansi Families: Travel to escape the city, stress and pressures of daily lives

Target Markets (Domestic Tourists)

- Target VFR travellers in the area for conversion into domestic tourists by promoting the tourist attractions and activities in the area and increase the supply of day visit facilities
- Attract business travellers to the area to return as leisure travellers by marketing the unique products and experiences offered in the Planning Domain.
- Target scientists and post graduate students for scientific research particularly around Mkambathi

In the foreign tourism market, the following are the most important targets:

- Foreign visitors from Europe and the Americas (for holiday travel) – these travel to the coastal and inland areas

Current marketing initiatives

Data for current market initiatives was obtained from the Tourism Sector Plans, telephonic interviews with relevant individuals from the two municipalities, reviewing websites and social media platforms.

Ingguzza Hill Local Municipality (IHLM)

IHLM does not have a marketing unit, however, there is a marketing plan which is incorporated in the Local Tourism Sector Plan. The IHLM does not have a dedicated tourism website, but a page within the IHLM website. This page is poorly maintained and is not engaging. This municipality also has a Tourism Brochure and a Tourism DVD. The IHLM participates in the domestic trade and consumer shows like Tourism Indaba, Macufe Festival and Grahamstown National Arts Festival

Port St. Johns LM

Marketing in Port St Johns is implemented by the Port St Johns Development Agency which develops marketing plans annually. The tourism website is linked to that of the Development Agency. There is also a Visitor Information Centre that is attached to the Development Agency. The Development Agency also has a tourism brochure and a booklet. A Port St Johns Tourism Forum is active and does marketing of its tourism businesses online and through collaboration with ECPTA.

Planning Domain

Within the Planning Domain, owners of the various developed products are responsible for their own marketing whilst those that are undeveloped benefit from the product owners close to their facilities or from bloggers and ECPTA. The undeveloped attractions were found to be poorly or not profiled (e.g. Pushungana Pools, and Ntentule Falls).

TOURISM SUPPLY ANALYSIS

Experiences, products, and activities (Current offerings)

Tourism supply analysis relates to the experiences, products and activities that are on offer in the local destination. Table 2 shows the list of products, experiences, and activities per each cluster. This list includes assessment of market readiness for each product using the following criteria as outlined in the Destination Management Manual:

- Visitors can easily find out all they need to know about the experience – what it is, how much it is, where to find it, hours of operation, etc.
- Visitors can find the location/site – using maps, signs, google maps, GPS.
- There are regular hours of operation so that visitors are not disappointed when they arrive.
- The experience is of good quality, meets all licensing and regulatory requirements.
- The experience offers good value

Table 2: List of current product offerings and activities

Name	Key Features	Activities/ Events	Facilities	Market Ready
Mkambati-Ntentule Cluster				
Mkambati	Natural Attractions Strandloper, Horseshoe, Mkambati, Msikaba, Misty Waterfalls A variety of bird, marine and mammal species Diverse Natural Habitat Spectacular scenery Dune and Indigenous Forests Rare and endemic plants and trees Rivers/Estuaries Nature Reserve Beaches	Rock and surf fishing, Game viewing Birding Ocean swimming Canoeing Snorkelling Hiking/Walking Mountain biking Whale and dolphin viewing	3 Cottages 1 Main Lodge Vulture Restaurant	Yes
	Cultural Experiences Shipwrecks Mpondo Culture			
Ntentule Falls	Natural Attractions Matheko river and Msikaba Confluence Open grassland	None yet	None	No Still need to conduct studies and do mapping
	Cultural Experiences Two sets of Caves Burial Caves used during time of wars	None yet		
Pushungana Pools	Natural Attractions Stunning water features Plant species	Swimming Walking	None	No Due to absence of development
Mnyameni Falls	Natural Attractions Mnyameni River Mnyameni Beach Mnyameni Pool	Swimming Picnic Hiking Walking	Homestays	No Due to absence of development
	Cultural Experiences Rock Shelters Rock Paintings Caves - Late Iron Age	None yet	None yet	

Lambasi-Ntsubane Cluster				
Ntsubane Mbotyi	Natural Attractions Water Falls Mbotyi Rivers Ntsubane Indigenous Forests Snake diversity Birding Beach	Canoeing Horse Riding Fishing Hiking Whale and Dolphin watching Guided village walks Tours (Own vehicle)	Mbotyi River Lodge Backpackers Mbotyi Campsite	Yes No Poor/dirty ablution facilities
	Cultural Experiences Arts and Craft	Sardine Run	None yet	Yes
Magwa Falls and Fraser Falls	Natural Attractions River Gorge	Swimming Hiking	None	Yes, however, require development
Lambasi Msikaba Gorge	Natural Attractions Msikaba River Msikaba Estuary Variety of plant species Birding area with a Vulture Colony Waterbluff	Walking Swimming Rock and surf Fishing Snorkelling	Accommodation Vulture Deck which needs refurbishment	Yes
	Cultural Experiences Spectacular rock formations Msikaba sandstone formation	None yet	None yet	No
Mount Thesiger Caguba Corridor				
Ntafufu River Mouth	Natural Attractions Confluence of four rivers Ntafufu estuary Beach Mangrove Forests Part of a Marine Protected Area Diversity of bird species	Bird watching Canoeing Cultural excursion Diving Fishing Hiking Swimming	Ntafufu Ecolodge Ntafufu Campsite	Yes No It is not operational
	Cultural experiences Cultural Village Traditional Xhosa Villages	None yet	None yet	No
Umngazana Mouth	Natural Attractions Estuary Mangrove Forests Bird Species Umngazana River	Boat Cruises Bird Walk Picnics Kayaking Trail Running Fishing Motor Boating Guided Hikes	Umngazi Hotel Cultural Village	Yes
Mt Thesiger – Mpembeni	Natural Attractions Rivers Variety of indigenous plant species Mount Thesiger Forest Reserve Dam Mount Thesiger Trail	Walking Picnics Photographic opportunities	None	No Due to absence of development
Isinuka Springs	Cultural Attractions Mudcaves Sulphur Pools	None yet	None	No Improve access to the Mudcaves

				Ablution facilities Showers at the Pools
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Amenities and Services

Except for Mbotyi, where there is a small town, none of the offset sites have the amenities like Visitor Information Centres, Petrol stations, shops, banks, and grocery stores etc. Most do not have directional and welcome signage; particularly those that are undeveloped with no product owners.

Basic infrastructure and services

- Connectivity: There is inadequate Information Technology (IT) infrastructure (limited network coverage)
- Water: None except at lodges and reserves.
- Sanitation: None except at lodges and reserves.
- Electricity: None except at lodges and reserves.
- Access and feeder roads.
 - Generally there is poor access to all sites.
 - Roads inside the Mkambati Nature Reserve leading to the waterfalls are non-existent
 - Very poor access road to Pushungana Pools and Mnyameni Falls
 - Access road to Magwa Falls is not well developed

Events

There are no events that are hosted directly in the planning domain. However, the ones identified below are championed by the municipalities and the private sector, and occur in the general vicinity of the offset sites.

Table 3. Major events in the area

Mount Thesiger Caguba Cluster	Sardine Run	Annually in July
	Wild Coast Isingqisethu Cultural Festival	Annually in September/October
Lambasi Ntsubane Cluster	Sardine Run	Annually in July
	Wild Coast Mountain Bike Run	
Mkambathi Ntentule Cluster	Tourism Month Celebrations	Annually in September
	Business Conference	Annually in April

Developments within the Planning Domain

There are developments which are either planned or are being implemented within the Planning Domain that will have an impact on the Tourism Implementation Plan.

- a) SANRAL has planned to implement the following projects:
 - Construction of Mtentu and Msikaba Bridge – under construction. The cable car used for transporting materials and equipment across the gorge can be used as a tourism opportunity during the operational phase of the bridge.
 - Establishment of a Visitor Information Centre next to Msikaba

- Visitor Information Centre next to Msikaba
 - Access Road from Mnyameni Falls to link with the N2
 - Two short access roads from the N2 to Ntentule Falls
 - Mbotyi to Mazizi pedestrian facilities
 - Caguba Access Road
- b) Accommodation Facilities at Mkambathi Nature Reserve by ECPTA
 - c) Cable car Feasibility Study by ECPTA at Mt. Thesiger
 - d) Msikaba Estuary Management Plan by ECPTA
 - e) Establishment of Magwa- Majola- Lambasi Agri-Ecotourism Corridor with huge eco-tourism investment project at Magwa Falls by ECRDA / DRDAR
 - f) PSJ Small Harbour & Town Development by Department of Transport
 - g) Revamping and facilitate licensing of 3 boat launch sites (Business Plan) by Port St Johns Municipality
 - h) Mtentu Community Programme – Upgrading of gravel road to surface road by Mbizana Local Municipality

Potential projects across the Planning Domain were suggested by various stakeholders during the situational analysis phase and are clearly articulated in the situational analysis report, and will not be repeated here.

STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS AND GAPS

Opportunities

Tourism Element	Opportunities
Products and experiences	The development of a high-quality vibrant tourism products could attract huge spending on public infrastructure thus creating a stimulus to attract private sector investment
	Waterfalls create an opportunity to establish diverse range of adventure tourism activities across the entire planning domain
	Opportunity to expose unknown destinations that have a potential of attracting visitors like Ntentule Falls, Isinuka Springs etc.
	<p>Opportunities for unemployed youth and tourism SMME's in some of the projects identified in the implementation plan which are as follows:</p> <ul style="list-style-type: none"> a) Tourism Data Collectors and Research Analysts for tourism b) Scientific researchers particularly around rare and endemic plant species in the Mkambati Ntentule Cluster c) Tour Guides for the identified Tourism Routes d) Site/ Adventure Guides e) Professional Event Organisers for the Signature Events f) Tourism Ambassadors and Food Safety officers in addressing safety of tourists g) Training of youth to conduct energy audit in the energy efficiency program h) Opportunities for SMME's and youth in accessing government support programs like mentorship, business development support and marketing support, learnership and youth employment creation programmes i) Opportunity for improving the existing and developing new art and craft product (creative industries). SMME's will benefit from market access support and training, skills development programs to improve the product quality based on market demand j) Opportunity to unleash the potential of the Planning Domain as a film destination and explore the associated benefits that can be exploited by the local communities and youth across the film value chain. Potential business opportunities relate to film producing, scriptwriting, acting, script reading, art directing, photography and many others k) Opportunities presented by the COVID-19 in terms of digitalisation of tourism businesses, safety and security of destinations and accessing related government incentive schemes l) Opportunities for the local communities and private landowners in proposed Biodiversity Agreements include investments in social services as well as investments in livelihoods. Benefits can also include direct employment which translate into salaries and wages m) Opportunities for the local communities in the proposed Public Private Partnerships include the following: <ul style="list-style-type: none"> o Shareholding o Skills transfer to communities o Strengthening the tourism sector's linkages with related sectors e.g. agriculture in the Magwa Lambasi Agritourism corridor, arts and craft in all polygons, transport, aquaculture (downstream opportunities) o Procurement of locally produced goods and employment of local people

	<ul style="list-style-type: none"> ○ Socio-economic development initiatives that lead to the upliftment of communities
Natural areas	<p>Potential to become one of the best adventure destinations that is recognised internationally e.g. Ntentule falls (second longest falls in Africa), Water Bluff (falls directly to the sea), Magwa falls (resembling Victoria Falls), Mtentu and Msikaba bridges (longest in the Southern Africa).</p> <p>Opportunity of becoming a film destination capitalising on the rich natural and cultural diversity in the planning domain</p>
Events	This presents an ideal opportunity to partner with the private sector to host signature events for further exposing the destination
Basic Infrastructure	Provision of basic infrastructure in support of tourism development in the Planning Domain could receive priority focus

Strengths, Weaknesses and Gaps

Tourism Element	Strengths	Weaknesses	Gaps
Tourism Data	Availability of socio-economic survey reports for each municipality	No dedicated personnel for tourism research and dependent on Statssa and SAT	Lack of specific Planning Domain tourism data to provide a true picture of tourism demand and supply information.
Products and experiences	Wide range of attractions and activities that appeal to numerous markets segments.	Poor packaging of attractions and activities	Undeveloped products and experiences portfolio in the Planning Domain
Natural areas	The Planning Domain is endowed with an abundant supply of natural iconic attractions which are a visitor drawcards.	Inefficient or lack of management structures in some natural areas	Natural areas are undermarketed and poorly/inadequately profiled
Events	Isingqisethu Cultural Festival and Sardine Run draw huge amounts of people	Poor resourcing of festivals and events	Poor coordination of signature events
Infrastructure	Huge investment on product development attracts spending in public infrastructure	Limited funding for public infrastructure investment	Poor or inadequate provision of basic services (water, access, electricity, sanitation) in the Planning Domain

Threats and Mitigation Measures

Tourism Element	Threats	Mitigation Measures
Tourism Market Demand	Global financial crisis and low domestic visitor arrivals and limited foreign arrivals	Aggressive marketing and promotion of the Planning Domain as an adventure destination with unique product offerings
Safety and Security	The outbreak of the COVID-19 pandemic and its effects on tourism performance	Awareness creation on COVID-19 tourism industry standard protocols
	Crime (real and perceived)	Develop a multi-sectoral Local Tourism Safety and Security Plan

Natural areas	Poorly managed and inappropriate tourism developments in ecological sensitive areas	Conduct feasibility studies and environmental impact assessments in all environment sensitive areas
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Target Setting

Vision

The Tourism Vision statements of the OR Tambo DM and the two Local Municipalities were reviewed:

Ingquza Hill Local Municipality	A developmental, economically viable municipality where communities enjoy equitable access to services in an environmentally sustainable manner
Port St. Johns Local Municipality	A destination of choice that promotes inclusive economic growth for a sustainable and unified municipality
OR Tambo District Municipality	A sustainable and vibrant tourism destination which is compelling to visitor

Based on these vision statements the proposed Tourism Vision for the Planned Domain is: **“A sustainable, vibrant, nature- and culture-based tourism destination that promotes inclusive economic growth”**

Goals and Objectives of this Tourism Implementation Plan

Goals	Priority	Objectives	Time Frames
Enhance tourism research capacity in the planning domain	Tourism Research	Ensure availability of accurate, authentic and up to date tourism data in the planning domain	Annually
Ensure that the planning domain remains relevant to its current and future markets	Marketing	Strengthen marketing and promotion of the planning domain in various platforms	Annually

Reduce seasonality	Domestic Tourism	Develop and host a range of events to showcase the planning domain	Annually
Increase supply of quality, market ready product offerings	Domestic Tourism	Improve current product offerings and develop new ones	Continuous
Adequate provision and maintenance of enabling basic infrastructure (water, electricity, communication networks and roads) in the planning domain	Domestic Tourism	Support and facilitate the provision of basic infrastructure (water, electricity, communication networks and roads) for growth of tourism in the planning domain	Continuous
Viable community owned tourism enterprises	Enterprise Development/Responsible Tourism	Develop and promote viable eco-tourism enterprises with maximum community participation	Continuous
Improve safety and security of visitors in the planning domain	Domestic Tourism	Develop and implement a tourism safety and security plan for the planning domain	2021

ACTION PLAN

Action	Lead institutions	Sponsor	Constraints or Issues	Key Outputs
Objective 1. Ensure availability of accurate and current tourism data in the planning domain				
Collect tourism supply data (beds, rooms, tourism businesses, market ready products)	ECPTA	ECPTA	Absence of Tourism Data Collectors	Tourism Annual Statistics Report
Conduct tourism industry market intelligence (employment, ownership, trainings, etc)	ECPTA	ECPTA		Reinforcement of the tourism research capacity
Collect and analyse tourism demand data for each polygon	ECPTA ECSECC	ECPTA	Absence of a national system to collect data at sub-destination level	Tourism Statistics report for each polygon
				Service Level Agreement with ECSECC
Objective 2: Strengthen marketing and promotion of the planning domain in various platforms				
Develop a product driven, customer-centric, innovative and creative marketing plan for the planning domain	ECPTA	ECPTA	Inadequate budget to implement the marketing plan	A comprehensive marketing plan
Identify products and experiences to be offered to the target markets and test their market readiness	ECPTA Private Sector partner	ECPTA	Limited product information and poor or lack of access	
Identify current and future target markets	ECPTA Private Sector partner	ECPTA	Extreme diversity of the tourism industry with varying interests	
Develop a tourism planning domain brand to cover all marketing channels	ECPTA Private Sector partner	ECPTA	Collaboration and cooperation between the local municipalities	
Identify key marketing platforms (both domestic and international) to increase exposure	ECPTA Private Sector partner	ECPTA Private Sector	Inadequacy of market ready products	
Develop marketing collateral for tradeshows, digital and print media	ECPTA Private Sector partner	ECPTA Private Sector	Availability of marketing collateral in all tourism products	
Objective 3: Develop and host a range of events to showcase the planning domain				
Develop a calendar of events for the planning domain	ECPTA	ECPTA	Poorly developed portfolio of events	Calendar of events
Identify events that can be elevated as signature events	Private Sector Municipalities			

Action	Lead institutions	Sponsor	Constraints or Issues	Key Outputs
	Sector Departments			
Establish partnerships with key industry players for joint hosting of events	ECPTA Private Sector Municipalities Sector Departments	ECPTA	Co-operation between private and public sector	Service level agreements
Objective 4: Improve current product offerings and develop new ones				
Conduct a comprehensive audit of products, experiences activities and services across the Planning Domain.	ECPTA Private Sector	ECPTA	Lack of a credible Product Inventory	Product Inventory Audit Report of Products, Experiences and Products. This should also heritage products
Take stock of all the state -owned tourism properties in the planning domain, assess their operational status and provide a comprehensive report on what needs to be done	ECPTA DEDEAT DEFF DT Municipalities Private Sector	ECPTA	Lack of a database for state owned tourism properties for the entire planning domain	Database of state-owned tourism properties and their current status and needs Revised management model Revenue generation plan
Review the current management model and revenue generation of the state-owned tourism properties (those outside the nature reserves) to transform them into viable offerings for the domestic market				
Mobilise resources for the revitalisation of state-owned tourism properties in the planning domain		ECPTA	Lack of funding	Strategic partnerships between the private and the public sector for syndication and leveraging of resources
Develop bankable business plans for the development of complementary Tourism Activity Hubs and products across the planning domain. This should include detailed Feasibility Studies, detailed polygon plans, architectural designs and environmental impact assessment studies and investor mobilisation plan. This should also incorporate responsible, greener development and digital technologies.	ECPTA DEDEAT DEFF DT Private Sector ECDC	ECPTA	Threatening of biodiversity by inappropriate tourism developments	Feasibility Study Reports Environmental Impact Assessment (EIA) Reports Detailed Polygon Plans and Architectural Designs Business Plans Project Dashboard
Conduct bankable business plans for the development of public facilities for the beaches and improving the beach product offering across the planning domain.	ECPTA ECSECC DT DEFF Private Sector Municipalities	ECPTA		

Action	Lead institutions	Sponsor	Constraints or Issues	Key Outputs
Develop a mechanism to attract private investors as potential partners for the management for the new products and experiences	ECPTA Private Sector GTAC	ECPTA	Lack of institutional champion	Institutional Champion for each polygon Investor mobilisation plan
Develop a planning domain Birding Tourism Route to develop and grow avitourism	ECPTA, DEDEAT, DT, DEFF Private Sector	ECPTA	Actively involved environmentalists	Bird species list in the planning domain Birding Tourism Route
Develop a Planning Domain Waterfall Tourism Route to develop and promote waterfalls	ECPTA, DEDEAT DT, DEFF Private Sector Municipalities	ECPTA		A list of waterfalls in the planning domain Comprehensive profile of each waterfall and a development plan for the Waterfall Tourism Route
Objective 5: Support and facilitate the provision of basic infrastructure for development and growth of tourism				
Develop a basic infrastructure support plan for the Planning Domain including information technology infrastructure	ECPTA DPW Treasury Municipalities	ECPTA DEDEAT ECDC DPW Municipalities	Lack of a specific list of roads for the planning domain Inadequate IT infrastructure	List of major attractions that require access roads and maintenance plan for all roads List of all destinations that can access Wi-Fi Engagement with relevant institutions to improve connectivity
Establish and maintain of comprehensive system of tourism signage in the planning domain, including directional and information signage	ECPTA Municipalities	Municipalities Private Sector	This will require that tourism routes be identified beforehand	Audit report for the installation of tourism road signs and directional signage Number of tourism signage installed Maintenance plan for comprehensive and coherent tourism signage throughout the planning domain
Identify a site for an additional Visitor Information Centre at a strategic location	ECPTA Private Sector Municipality	ECPTA	Engagement with DT for the ideal Visitor Information model	Approved site and structure
Ensure that all tourism businesses have access to electricity, water and proper sanitation	Private Sector ECPTA	Private Sector Municipality	Availability of tourism businesses that comply	Tourism Business Survey Reports

Action	Lead institutions	Sponsor	Constraints or Issues	Key Outputs
	Municipality		with statutory requirements	
Objective 6: Develop and promote viable eco-tourism enterprises with maximum community participation				
Develop and implement community empowerment and enterprise development support programs for the local community	ECPTA DT SEDA ECDC DEDEAT	ECPTA	Lack of accurate picture of tourism businesses	Tourism SMME's database; the database should include information on local crafters Needs assessment report for all the existing tourism related businesses in the planning domain Number of businesses and individuals participating on business development training and/ or capacity building sessions
Create opportunities to develop skilled youth for participation in the biodiversity offset project	ECPTA NYDA Municipalities DT WESSA CATHSETTA	ECPTA	Absence of a database of the unemployed youth	Database for the unemployed youth in the planning domain Number of youths participating in learnership program both for tourism and environment, film industry or other related programs Number of youths participating in employment creation programs Improvement in the supply of critical and scarce skills for the successful implementation of identified projects
Conduct awareness creation sessions for the tourism industry and communities to heighten awareness and provide updates on various tourism programmes	ECPTA TGCSA	ECPTA	Limited participation of product owners in awareness creation sessions	Increase in the number of graded accommodation establishments Number of accommodation and hospitality products that comply to Tourism Industry Standard Protocols for COVID-19

Action	Lead institutions	Sponsor	Constraints or Issues	Key Outputs
Develop capacity building and awareness programmes on energy efficiency solutions aimed at reducing consumption of water and energy, waste and avoid pollution through introducing use of low energy technologies	ECPTA DT	ECPTA	Lack of understanding	Number of tourism resource efficiency initiatives implemented Number of tourism businesses applying energy efficiency solutions in their businesses Number of youths trained in conducting energy audits
Develop and implement a tourism safety and security plan	ECPTA, SAPS Department of Safety and Liaison (DSL)	ECPTA	Collaboration with key stakeholders	Tourism Safety and Security Plan for the Planning Domain Participation in the Tourism Safety and Security Forum

IMPLEMENTATION AND MONITORING

Once this Tourism Implementation Plan is finalised and endorsed by the ECPTA’s Technical Committee, it must be shared with the wider stakeholders for their inputs before implementation. Individual consultations and engagements with the critical stakeholders as outlined in the stakeholder analysis should be done. This could take the form of workshops, webinars, telephonic or email engagements.

When the Covid-19 restrictions end, it will be extremely helpful for ECPTA to host a stakeholder engagement session in the Wild Coast which will bring all these role-players and potential partners to share the plan and solicit buy-in. It is also important that both the municipalities and DEDEAT be consulted prior to implementation so as to ensure that the proposed developments are aligned to LSDF’s, the provincial legislation and ultimate inclusion in the municipal IDP’s.

Implementation of the Plan

Once the PMU has been established, a Tourism Working Group should be established whose role will be to oversee and monitor the implementation of the tourism plan. Such a working group should comprise people from key departments, representatives from the private sector and communities. Further stakeholder engagement should be done during the implementation plan. For ease of implementation, it is advisable that the Implementation Plan be further broken down into simpler and straight forward activities as per the predetermined outputs. This must be done by the PMU tourism specialist when they start.

Monitoring and Evaluation

A monitoring and evaluation plan should be developed against the key objectives and key outputs in this Implementation Plan. Key indicators to track progress should be identified as outlined in the Destination Planning Manual.

Proposed Budget

The implementation of the Tourism Implementation Plan does not rely solely on ECPTA. Resource mobilisation through strategic partnerships should be encouraged to reduce the financial strain on ECPTA. A proposed three-year budget has been estimated but must be finalised once the tourism working group has finalised their detailed work plan.

Table 4. Proposed three-year tourism facilitation budget

Project / Activities	Year 1	Year 2	Year 3	Total
Marketing Campaigns	R200 000	R 150 000	R 50 000	R400 000
Customer Survey	R 100 000	R 50 000	R 30 000	R180 000
Tourism research and market intelligence	R 200 000	R 300 000	R 100 000	R600 000
Interactive and responsive Website	R 20 000	R 150 000	R 30 000	R200 000
Sub-total	R520 000	R650 000	R210 000	R1 380 000
Audit of Tourism Assets and Maintenance	R500 000	R50 000	R50 000	R600 000
Web based Tourism Product Inventory	R50 000	R300 000	R50 000	R400 000
SMME Database and Maintenance	R100 000	R50 000	R50 000	R200 000
Business Plans, Feasibility Studies, EIA’s, Designs	R2 000 000	R2 000 000	R3 000 000	R7 000 000
Tourism Signage Audit	R200 000			R200 000
Tourism Signage Installation	R50 000	R200 000	R200 000	R450 000
Sub-total	R2 900 000	R2600 000	R3 350 000	R8 850 000
Skills and Capacity Building	R100 000	R100 000	R50 000	R250 000

Awareness Creation	R50 000	R100 000	R50 0000	R200 000
Sub-total	R150 000	R200 000	R100 000	R450 000
TOTAL BUDGET	R4 050 000	R4 350 000	R3 660 000	R10 680 000

INSTITUTIONAL ARRANGEMENTS

The successful implementation of this Tourism Implementation Plan is dependent on the commitment of all stakeholders to adopt an integrated and participatory approach that embraces the principles of responsible tourism. Good destination management sets the tone for a vibrant tourism industry that stimulates economy, job creation, cultural and lifestyle outcomes and potential income sources to manage and maintain cultural and natural heritage resources of the destination. This requires sound and effective management institution, governance structures and processes that manage and support the destination.

Sustainability of the Project both in terms of the management model and financial capacity is critical and needs to be discussed at the planning stage. This would also involve revenue generation to reduce dependence of the Project on state funding as well as maintenance plan of public infrastructure. Sound business principles should be used to generate revenue from tourism strategic initiatives to support the Project. The ECPTA is the Implementing Entity of the Project. However, two management models are proposed to address the issue of sustainability and upscale operational efficiency, i.e. Biodiversity Stewardship and Public Private Partnership.

Biodiversity Stewardship

Biodiversity stewardship is an agreement with private and communal landowners to protect and manage land in biodiversity priority areas under the National Environmental Management Protected Areas Act, 2003, which states that

“A private or communal landowner voluntarily enters in a contract agreement with a protected area agency, in which landowners maintain ownership of their land and have their land declared as a protected area.”

This is a conservation agreement, typically signed for a three-year duration (with the option for renewal) to people or communities who own and use natural resources. Benefits typically include investments in social services as well as investments in livelihoods. Benefits can also include direct payments and wages. The size of these benefit packages depends on the cost of changes in resource use, as well as conservation performance.

ECPTA is already implementing the Biodiversity Stewardship Programme in various conservation areas with good results and Pondoland is prioritized for stewardship expansion. The incentives for the participating landowners vary from technical advice and support on biodiversity management, recognition and marketing opportunities, exclusion from being charged property rates and income tax deductions for the Nature Reserves declared for at least 99 years. This arrangement would favour the Planning Domain and the communities are the landowners.

Public Private Partnership

Public and Private Partnerships (PPP) is another management model that can be recommended through commercialization of tourism activities relating to accommodation, food, beverage, and tourism activities. This is a contractual agreement whereby the private sector is given the right and agrees to provide a public service or public infrastructure traditionally provided by the public sector on behalf of the government. The private sector provides the service in exchange for specific economic benefits over a specified period. PPP transfers some risks to the private sector and to finance, develop and implement a range of projects spanning from smaller social services-oriented projects to large-scale physical infrastructure projects. PPPs are complex constructs that require detailed analysis and planning as well as high levels of technical expertise in areas such as financial and economic analysis, commercial contractual law, procurement, budgeting, engineering and construction, investment due diligence and project management. Community benefits vary from shareholding, employment opportunities, training of community and procurement of locally produced goods.

Depending on the agreement with the Concessionaire, the community benefits could take the form of :

- Shareholding
- Training and Capacity building through skills transfer to communities; vocational education and training for staff
- Enterprise development through strengthening the tourism sector's linkages with related sectors e.g. agriculture, arts and craft, transport, aquaculture (downstream opportunities)
- Improving sustainable livelihoods through reinforcing socio-economic development initiatives that lead to the upliftment of communities
- Procurement of locally produced goods and employment of local people

The ECPTA management should take a decision on the most appropriate management model or they can be used both. Whilst the ECPTA is the Implementing Agency of the Project and its core mandate is tourism marketing of the province, aggressive marketing of the Planning Domain is required to achieve results as tourism could be the main driver of revenue generation. This could necessitate possible reinforcement of marketing capacity through either having dedicated personnel responsible for marketing the Project beyond the planning phase or appoint a Destination Marketing Company or Destination Marketing Organisation for a short period. Also, within marketing, a tourism research programme (that is informed by product, visitor needs and expectations) that integrates science and conservation is necessary for tourism to play a stronger role in delivering outcomes that have lasting impact on local economic development. There needs to be a deliberate effort to reinforce the market intelligence capacity to have a full picture of the current state of tourism in the Planning Domain as well as monitoring tourism performance at frequent intervals.

SMME OPPORTUNITIES THAT MAY BE LINKED WITH TOURISM

The Wild Coast Spatial Development Initiative is an agri-tourism development strategy that was conceptualised nationally to unlock the inherent economic potential of the Wild Coast. Broadly speaking, agri-tourism is an agriculturally based operation that has the potential to attract visitors. During stakeholder engagement, the participants were queried on the projects that they can propose for ecotourism objectives. Below is a summary of opportunities were identified during this process. For details, a person must read the SMME report.

Table 5: Proposed SMMEs from Community Conservation Committees of each polygon area

Chaguba	1	Botanical Garden	6	Silaka Nature Reserve Expansion towards Chwebeni or Mt Thesiger
	2	Nursery	7	Preservation of Mangrove Colony for Tourism
	3	Cultural Village	8	Aquaculture Project
	4	Chalets for Tourism	9	Boardwalk
	5	Alien Plant Eradication Programme	10	Chaguba Conservancy
Lambasi	1	Nature Reserve	2	Coffee Shop next to the existing viewing deck (Vulture Colony Viewing Deck)
Mbotyi	1	Cultural Village	3	Snake Park
	2	Eco-Lodge	4	Bird Watching
Mkambati	1	Viewing decks	5	Cultural Village
	2	Nursery	6	Grazing Camps
	3	Campsites	7	Botanical Garden
	4	Chalets		
Ntentule Falls	1	Viewing deck	4	Hiking Trails
	2	Game Farming and Conservation Agri-Tourism	5	Waterfall Adventure Tours (Hiking, Abseiling, Rock Climbing, Zipline)
	3	Campsites/ Chalets in waterfall vicinity		

Msikaba-Mkhambati-Mtentu Opportunities

Upon further engagement, the CCC came up with a list of potential projects indicated in Table 5. These too were many and very diverse. A consolidation of all these suggested that use of indigenous plants (in the form of a **botanical garden**) are a potential resource that can be used for bringing the much-needed tourism into the area. The plant diversity of the area can be the draw-card associated with chalets and campsites to provide accommodation for tourists. Construction of viewing decks associated with the main site seeing may be considered. SMME opportunities that can be associated with these are a **cut-flower project** and a **nursery** to cultivate indigenous plants for sale.



Figure 2: A typical example of the outlook of a potential protea (and other local species) cut flower project in Mkambati



Mthentu gorge: Maze vegetated with local indigenous plants (aligned with plant nursery)

Msikaba Gorge: Amphitheatre aligned to the botanical garden

Ntentule Section Opportunities

The Ntentule community proposed the establishment of a consolidated protected area around the Msikaba Gorge to create a single ecologically, economically and socially sustainable protected area that has unique natural and cultural heritage and is characteristic of the surrounding landscape. The identified site is a contiguous area along the gorge that does not compete with the current land use options of the community. The area selected by the community falls within the Pondoland Centre of biological diversity and endemism. The area around the gorge is predominantly thicket and forest. This proposal from the community was in congruent with the proposals from their CCCs as reflected in Table 5.

This initiative is in line with the Wild Coast Spatial Development Initiative (SDI) whose objective is to conserve and sustainably utilise the biological diversity, while encapsulating economic opportunities in a large self-sustaining system. The Ntentule community intends to leverage on the fact that the identified land is close to the new N2 toll road. This is a low-hanging fruit that needs to be utilised by ECPTA in ensuring the objectives of ECPTA's PAES. This conservation area can have sections dedicated for game farming (Wildlife Trade).



Figure 3: A representation of a potential viewing deck overseeing the Ntentule falls with an adjacent kiosk for local products

The Ntentule Falls on the Matheko River, and the Msikaba Gorge itself are potential high value **eco-tourism** features in the area. The Ntentule Falls are the second highest waterfalls in South Africa (175 m) with two sets of caves located on the rock outcrops next to the waterfall. The waterfall has a unique advantage in that it can be viewed from the N2 Road (under construction) and has the potential to attract motorists to explore the area. This makes it a strategic tourism asset for area that may increase economic activity for other areas around the falls. Specific options proposed for improving the tourism experience include:

1. Establishing **viewing decks** at strategic locations near the falls.
2. Inviting partnerships with **adventure tourism** providers, such as bungee jumping, cable bridge and canopy tour rides. These have a lot of potential as they are relatively short duration and can serve as a 'break' for tourists travelling along the new N2.
3. Developing the **cultural history narrative** associated with the Burial Caves to provide for a heritage and history experience through **trained guides** (e.g. some Traditional Council Members indicated that the Burial Caves were used during times of war amongst communities).
4. Establishing the **Ntentule Falls Campsite** and N2 overnight stop to increase the economic benefits. Although camping is often considered a wilderness experience, it is also an ideal budget holiday for families who may not afford other accommodation. However, the reality of the Wild Coast is that most families will want to stay at campsites near the beach, so the proposed Ntentule Campsite should rather aim for short-term overnight stays aiming for families who wish to break their journey down the N2, or for those who want to explore the inland area for a few day as part of their Wild Coast experience. The construction of the N2 Wild Coast road also creates a potential to attract a long-term segment that would include workers (see note below regarding a potential partnership with SANRAL to build the campsite).

Lambasi-Msikaba-Mbotyi Opportunities

The Lambasi area is endowed with rich grassland biodiversity (being in the core of the Pondoland Centre of Endemism) and is also characterised by areas of outstanding natural beauty such as the Msikaba River Gorge with its vulture colony and impressive rock formations (e.g. Cathedral Rock), many estuaries, coastal dunes, wetlands, grasslands, and coastal forests. The area also boasts a Marine Protected Area extending to Mkambati Nature Reserve (RSA, 2010: DEDEA), and includes the spectacular 93 m high Waterfall Bluff, which is one of only a few waterfalls on earth that plunge directly into the ocean. The area is also adjacent to the 1,800 ha Magwa tea plantation, South Africa's last remaining tea estate, which also includes the impressive Magwa Falls (144 m).

It is necessary to protect and promote the area's unique biodiversity and natural beauty, while providing local livelihood opportunities by focusing on non-consumptive use of natural resources through eco-tourism. The conservation aspects of the area are considered as part of the section on Offset Implementation (see above) and here we deal with the livelihood opportunities associated with ecotourism. As reflected in Table 5, the Lambasi community desires a formulation of a nature reserve. An establishment of this nature reserve will go a long way into conserving and promoting the biodiversity value of this unique area.

Attracting tourists to the Lambasi area requires decent tourism facilities. Based on community consultation in the area, five interlinked projects are highlighted here as potential opportunities to develop tourism in the area:

- Upgrading a local camp site at Msikaba Mouth.
- Upgrading the viewing deck for the vulture colony.
- Establishing a vulture restaurant.
- Establishment of a snake park in Mbotyi
- An eco-lodge accommodation facility in Mbotyi

Associated opportunities could also be explored into the future such as hiking and fishing guides. Considerable experience is needed to establish and run a campsite, and we highly recommend expanding on the model used with the existing campsite at Luphutana, where the community has a partnership with a private company, Drifters Adventure Tours. The PMU should work with the community to develop a similar partnership for the Msikaba Mouth Campsite as the private entity will bring a strong business model to the design and management of the campsite. This should be done through open invitation to tender process, or even just by negotiating with the existing partner at Luphutana to expand their operations.

The establishment of a vulture restaurant, which involves the provision of non-toxic meat for vultures, will provide several important benefits. Firstly, it will improve local food availability, especially in times of food scarcity, and will thus address the major threat facing the Msikaba vultures. Secondly, the birds will not be required to source food from unprotected areas where there is a high risk of poisonings or powerline strikes. Thirdly, it will ensure that large aggregations of individuals of one or more scavenger bird species in the proximity of the tourism facilities, which will thus be a drawcard for tourists to the area.



The key to a vulture restaurant is having a regular source of food in the form of livestock carcasses that have not been poisoned or injected with anti-inflammatory drugs which are highly toxic to vultures. This presents an opportunity to purchase livestock from local farmers, especially of their older and even diseased animals (so long as they have not been medicated). The revenue from the tourism facilities (see below) should be used to pay for this.

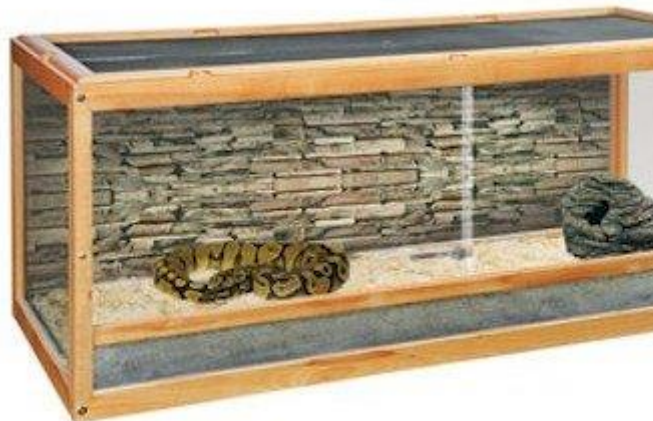
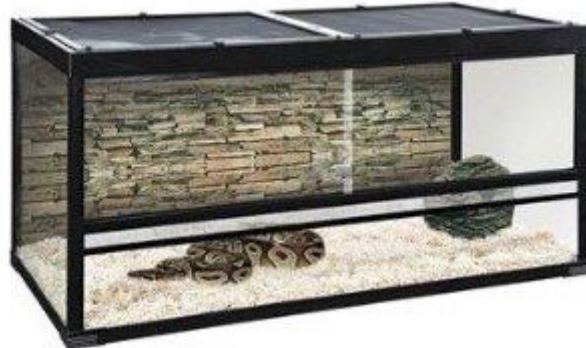
Eco-lodge accommodation and a snake park

The location of the site in which the local community would like to have an eco-lodge has a scenic view of the beach. The only challenge to this location is access. The good access road ends before it reaches the top of the hill. A track road of about 2km would need to be developed from the main access road to the proposed eco-lodge. There is currently a campsite in Mbotyi that is a joint venture between the Mbotyi Community and Mbotyi River Camp Site. This campsite is managed by the Mbotyi Camp Site Trust. This Camp Site is not functional and

is in a bad condition. This may be because the Mbotyi River Camp Site and the Mbotyi Community camp are competing for the same market. It is in this context that the community wants to have its own camp far removed from the current Mbotyi River Camp Site and will potentially compete with a different market. The location of the proposed snake park together with bird watching in the forested area and provide a different offering.



Examples of snakes that can be used



Cages that can be used for display

Southern Cluster Opportunities

The Port St Johns community had a wide range of interests as indicated in Table 5. The low hanging fruits amongst these is the expansion of Silaka Nature Reserve and the use of current facilities for mangrove tourism, chalets and boardwalks. There are numerous currently existing chalets and other related infrastructure that are not used. If the biodiversity offset project can assist communities in enabling these to be functional, ECPTA would have saved significant amount of money in investing in infrastructure projects in this area, leveraging on those that have been constructed by other government entities. The extension of the Silaka Nature Reserve should be embraced as it will provide much needed deliverables of the ECPTA's ECPAES. There is a fair justification of the establishment of a botanical garden in the area. It will not at all compete with the botanical garden proposed in the northern cluster. In actual fact, it will have a potential for collection and conservation of a representative list of plant species of the southern cluster.

The Port St Johns economy depends heavily on the tourism industry. However, the tourism infrastructure in the area is not fully realised or well-managed. Some of the infrastructure has been built and managed by DEDEAT, including the camp sites in Ntafufu and Mngazana as part of the big hiking trail from Mtamvuna to Port St Johns. This infrastructure has been ineffectively managed for a considerable time. The Port St Johns area is already attracting a lot of tourists and there is considerable opportunity increase this by linking these camp sites to the estuary and the beach.



Figure 4: Photos of some of the Ntafufu campsite infrastructure

The Ntafufu estuary, which is at the confluence of four rivers and is part of the Pondoland Marine Protected Area (MPA), could be classified as a third order node. It is also a site where boats are launched, although the launching site has not been developed. Close to the river mouth is the Ntafufu Camp Site that NDT donated to the municipality in 2015. The camp site has a good access road and has infrastructure such as chalets, ablution facilities, water tanks and electrification. Although there have been about four meetings between the NDT and the Port St Johns Local Municipality, this camp site has not been officially handed over to the municipality, is thus not currently in use. Due to this “abandonment” the camp site has been vandalized, forcing the municipality to employ the services of a security guard. The municipality is now considering outsourcing the management of the camp site to a private entity.

This campsite has significant potential as it can be managed together with the popular hiking trail huts at Lephoko together with the cultural village and be sold as a package to potential tourists. The municipality is considering building a lapa with a viewing deck and boardwalk along the river mouth that can act as an additional facility for the potential tourists to view the river mouth. This could be ideal for birders because this river mouth has a high diversity of bird species. The location of the Ntafufu camp site in relation to the river and the flood plain is ideal for avi-tourism.

There is, however, a need of collaboration engagements between NDT, PSJ Local Municipality and ECPTA to ensure that this facility is functional. There is a need of aligning these opportunities to enhance job-creation and promote self-sufficiency, which will have a sustainable impact on tourism in the area. An increase in the number of tourists coming to Ntafufu and Mngazana will also have a positive spin-off in the existing tourism-associated industries in Port St Johns



Figure 5: A potential representation of a boardwalk along the mangroves forest

Boardwalks and associated bird hides are an example of infrastructure that can help achieve these multiple conservation and tourism goals by:

- Limiting the potential of negative impact of pedestrians on the sensitive flood plains and mangrove environments.
- Provision of an easier and more direct route along the riverine environment.
- Provision of a unique opportunity for tourists to experience one of South Africa's few healthy salt marshes and the associated wildlife.
- Provision of wheelchair access to this unique setting for people.

Two bird hides are proposed along the boardwalk. These will provide visitors with an opportunity to enjoy the rare ecosystem, for activities such as bird watching and painting/sketching. At the same time they offer the opportunity to provide educational resource boards that teach visitors about the estuarine species living in the salt marsh.

PROPOSED BUDGETING FOR TOURISM RELATED SMME'S ACTIVITIES

Northern Cluster

Mtentu Gorge: Bizana

a) Nursery

Project area: Mthentu Gorge

Project description: 50 x 50m nursery yard. Green/glasshouse 30m x 20m

Project costing:

Cost estimates (adapted from the botanical garden by SANBI):

Projected potential cost: R2 500 000.00

b) Maze/Labyrinth

Project area: Mthentu Gorge

Project description: has a Diameter of 29 meters and a circumference of 91 meters. The length of the pathway is 700 meters, and the total distance of the walk to the center and out is 1.4 kilometers. The background: the Edge Mountain Retreat: The following information was sourced from the Edge Mountain Retreat Hogsburg website and it has to be cited in the text as such. The Labyrinth at The Edge is an eleven-circuit Labyrinth, similar in design to the Labyrinth in the Chartres Cathedral in France. It is one of the most intricate Labyrinth designs. Their Labyrinth at The Edge has a diameter of 29 meters and a circumference of 91 meters. The length of the pathway is 700 meters, and the total distance of the walk to the centre and out is 1.4 kilometres, making it one of the largest Labyrinths in the world! It was completed in 2002. For many centuries the Labyrinth has been used as a pathway to spiritual discovery and fulfilment. The Labyrinth is used as a means to enhance prayerful attitudes, intimacy, meditative states, and spiritual focus. Anyone of any belief system can use it. The Labyrinth has been part of human consciousness for about 5 000 years with the oldest recorded Labyrinth being a stone-carved relief in Sardinia dating back to about 2 500 BC. A Labyrinth-patterned building dated about 1 800 BC can be found near the pyramid of Pharaoh Amenemhet III in Fayum, Egypt. A coin unearthed in Syria and dating back to 1 300 BC has a Labyrinth pattern pressed into it. The Labyrinth has a protecting and nurturing nature. Homes, seafaring ships and Cathedrals often had a Labyrinth carving or painting, usually on the masthead or over the front door, to keep all within safe. Throughout history, the Labyrinth has been used for marriage and commitment ceremonies. Couples recite vows in the centre of the Labyrinth, then emerge together to mark their new life.

Project costing

Projected potential cost: R3 000 000. 00

c) Cut flower project

Project area: (Mkambathi) Pondoland cut flowers as annual flowers.

Project Description: The establishment of a farm for the production of cut flowers Sector Agriculture sector/agriculture production. The project is based on the establishment of a farm for the production of field-grown cut flowers using the best state-of-the-art technologies of agriculture, to be marketed and sold in the local market and the exporting markets. The entire area of the farm is 100m x 100m and the number of employees can be five (5) employees. Field grown cut flower production, in general, is a low overhead business. A cost accounting program should be developed to help producers calculate the cost of each crop. In addition, a series of benchmark budgets can be visited for speciality cut flowers.

Project costing:

Capex - Cutflower farm establishment: R2 000 000.00

Fencing: R500 000

Projected potential cost: R2 500 000. 00

d) Botanical garden:

Project area: Msikaba River Gorge

Project description

Project costing

Projected potential cost: R1 336 769.5 (see attachment and use as an appendix).

e) Amphitheatre:

Project area: Msikaba River Gorge

Project description: Site plan size or yard: 50m x 100m. The precinct or area plan in diameter: 80 -100m radius.

Projected potential cost: R3 000 000. 00.

f) Viewing Deck

Project area: Ntentule Falls (adjacent to Msikaba Gorge)

Projects description: The viewing deck will be adjacent to the magnificent high falls in the region at approximately 175cm high. The deck will assist the tourists as visitors to view the N2 Wild Coast Road from two kilometres and will be on higher altitude.

Project costing:

Projected potential cost: R 120 000.00

g) Koisk/Curio

Project area: Ntentule Falls (adjacent to Msikaba Gorge)

Projects description: The curio will be adjacent to the magnificent high falls in the region at approximately 175cm high. The curio will sell Art work and souvenirs deck will assist the tourists as visitors to view the N2 Wild Coast Road from two kilometres and will be on higher altitude.

Project costing:

The size of the mobile structure will be 12m x 12 m

Projected potential cost: R200 000. 00

Central Cluster

a) Snake park

Project area: Mbotyi (Mkhozi Gorge)

Projects description: This will be a dedicated are to the preservation and conservation of snakes, many species of which are gradually becoming extinct. Trained personnel will trap and host a variety of snakes from the local habitat to showcase to the tourist. These may include cobras and vipers etc. On a social phenomenon, this may quell mythical fears and superstitions about snakes. The precinct site plan size or yard can be 50m x 50m. The floor plan of the snake house can be 6m x 3m. The area will be fenced with an entrance gate as an access control to collect the entrance fees for the revenue generation of the park.

Project costing:

Fencing: R50 000.00

Snake house: R60 000. 00

Applicable regulations and licence fees: R10 000. 00

Projected potential cost: R120 000. 00

For ease of reference, the Curator of East London Python Park for future consideration during project implementation or execution phase

Southern Cluster

a) The Boardwalk

Project name: Mngazana Estuary (Mangroves)

Project description: This boardwalk (board walk, boarded path, promenade) will be an elevated footpath, walkway, or causeway built with wooden planks that enables pedestrians to cross wet, fragile, or marshy land. It can be between 20m - 50m long depending on the available budget during implementation phase. Bird watch structures will also be implemented.

Project costing:

50m stretch: R100 000. 00

Bird watch structures: R 80 000.00

Projected potential cost:: R180 000.00

Activities Common Across All Polygons/Offset Receiving Sites

a) Firewood stock

Project area:

Project description: This will include firewood and or charcoal processing from wattle and eucalyptus/blue gum biomass. Charcoal can be explored later. Avocado vision can assist to enhance the charcoal value chain but to explore later as because carbon mitigation can be an issue. Carbon Credits are essential to finance investment the processes noting because we will having massive rehab programme with the impact it will make. Then the carbon funding will require soliciting.

Project costing:

Processing bag and staples: R150 000. 00 to R200 000. 00

Projected potential cost: R300 000. 00

b) Range ecology management:

Project area: Unique across all polygons

Project description: Mobilization & training (Herding academy) of eight (8) Community Conservation Committees (CCC's) in the landscape. These include a) Governance & grazing association, b) establishment of grazing committees for vaccination and compliance with best practices regarding and eventually stock auctions and c) mentorship.

Project costing:

The of doing business to sustain presence in phase approach: R 800 000. 00 for inception year, incrementally over 5 years. Other activities as listed above will be executed afterwards (including resource leveraging or co - funding for the subsequent years).

Total project cost:

Projected inception and kills development: R800 000. 00

The projected total cost of all these projects will be approximately **R14 120 000.00**. The summery is presented in the table below.

It should be noted that the initial project cost model did not have this kind of budget. Based on strong recommendations of the client, refers ECPTA the Tourism management plans are reflecting these activities. During implementation phase, it is recommended that each project as a standard practice must reflect, Pre-Feasibility Study requirements for recommendations towards implementation/execution and that the following should be taken into consideration: a) Target Market: e.g. applicable to cut flowers the where the tourists and Mkambati hotel market including exporting markets, b) Investment Cost, c) the average return on investment, d) the return on investment in ten years and e) rate of return of the project. The Sensitivity Analysis or Risk Assessment should indicate what would be a low risk in case of 10% increase in investment cost, or 10% increase in operating costs, or 10% decrease in revenues. The increasing local demand e.g. cutflowers particularly weddings, offices, hotels and restaurants should influence economic growth and the expansion of each area. Exploration of Ntentule mounted binoculars stand and craft/farm stalls should be considered. High level scoping of the opportunity e.g. canopy tours but the market research per opportunity is very essential. There are opportunities for consideration of hiking trails as features of attractions may increase over time. This will lead to the value chain where SMMEs will be created e.g. hiking trail tour guiding, cultural offering, catering, horse along pristine areas such as river, mangroves and gorges found in Mthentu, Msikaba and Mkhozi rivers. Though some activities are not nature based bust the expansions of these projects can include river Ferries or Pont for hikers to cross over etc (see below).



Table 6: Proposed potential costs of tourism related SMMEs

Proposed Budget for Tourism Related SMMEs		
NORTHERN CLUSTER		
No	Project	Budget per project Status
1	Mtentu Gorge Nursery	R2 500 000.00
2	Maze/Labyrinth	R3 000 000. 00
3	Cut flower project	R2 500 000. 00
4	Botanical garden:	R1 400 000.00
5	Amphitheatre:	R3 000 000.00
6	Viewing Deck	R 120 000.00
7	Koisk/Curio	R 200 000. 00
CENTRAL CLUSTER		
8	Snake park	R 120 000. 00
SOUTHERN CLUSTER		
9	The Boardwalk and Birdwatch structures	R 180 000.00
UNIQUE ACROSS POLYGONS/OFFSET RECEIVING SITE		
10	Firewood stock	R 300 000. 00
11	Range ecology management	R 800 000. 00
Total project cost:		R14 120 000.00

CONCLUDING REMARKS

The successful implementation of the Tourism Implementation Plan will depend on the political will, commitment and continuous engagement of various stakeholders including OR Tambo District Municipality will be of great importance. The Tourism Implementation Plan is a multi-sectoral framework whose implementation will require structured and formalised partnerships with various sector departments at national and provincial level. Although the ECPTA / PMU may be responsible for implementing this plan to facilitate tourism development in the area, it is not responsible for the actual development. The latter will have to emerge from the various project partners, including the private sector and communities.