



CAPE MORGAN NATURE RESERVE FEASIBILITY STUDY

PHASE 2

MARKET FEASIBILITY AND CONCEPT DEVELOPMENT

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SECTION A: INTRODUCTION

A1. PURPOSE OF THIS DOCUMENT

Messrs Tshani Consulting CC have been appointed by the Eastern Cape Parks and Tourism Agency (herein after referred to as the “ECPTA”), to conduct a Feasibility Study to determine the possible projects that could be developed to enhance Cape Morgan Nature Reserve (Here after referred to as CMNR) and propose the sustainability thereof once developed.

This report therefore serves as the “Market Feasibility and Concept Development”, being Phase 2 of the Feasibility Study.

This document comprises of the following sections:

- ▶ Stakeholder session
- ▶ Basic Services assessment
- ▶ Tourism Analysis
- ▶ Concept Development
- ▶ Anticipated Infrastructure

A workshop was held on the 2nd of February 2012 at Kei Mouth Environmental Center.

SECTION B: STAKEHOLDER SESSION

The agendas of the workshop were presented with the tourism market investigation results and current infrastructure at CMNR.

A Vision and SWOT (strength, weaknesses, opportunities and threats), analysis exercise was done with the attendees. The Attendees were then requested to identify development opportunities. These opportunities were then investigated for feasible options to be placed on plan, concept development section.

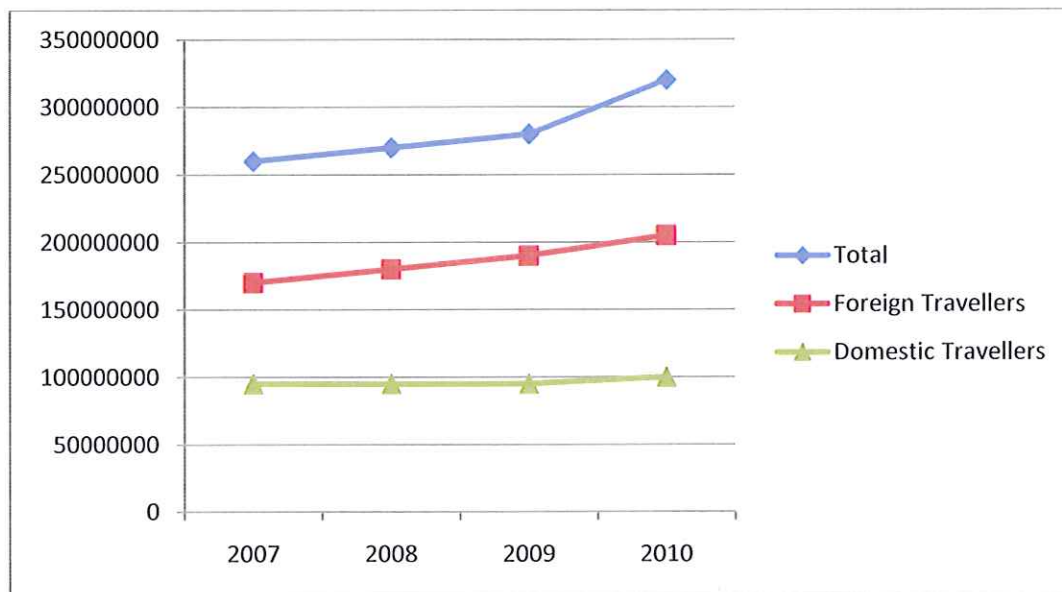
SECTION C: TOURISM ANALYSIS

A thorough assessment of tourism markets and current offerings was completed which include the following: attractions, amenities and ancillary services. The following assessment of international travel trends was excluded from the phase one report but will be incorporated into the correct position once the final report is prepared.

C1. INTERNATIONAL TRAVEL

According to Stats SA foreign tourism arrivals has increased annually between 2001 -2010 by 7% from 5908024 to 11574540 see figure 1. The graph illustrates an increase by both international and domestic travellers and results in overall increase.

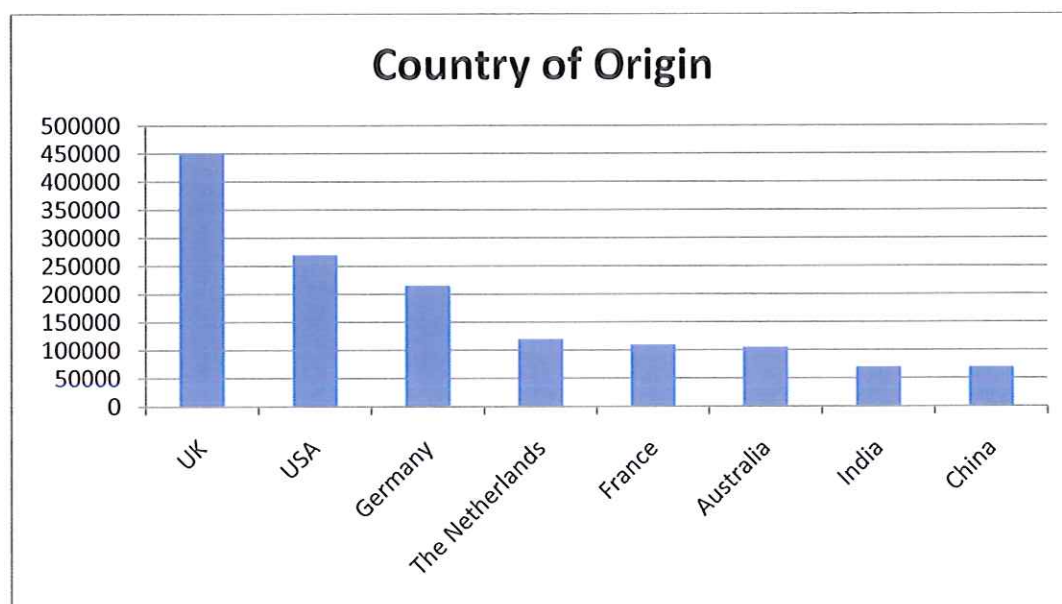
FIGURE NO. 1 Figure 1: Number travellers to South Africa



Source: Stats SA, 2010 Report

Figure 2a shows highlights the top leading countries of origin for international guest to South Africa dominated by the UK market 450000 arrivals, USA 280000, Germany 220000, 120000 France, Australia, India and China being below 100000 arrivals.

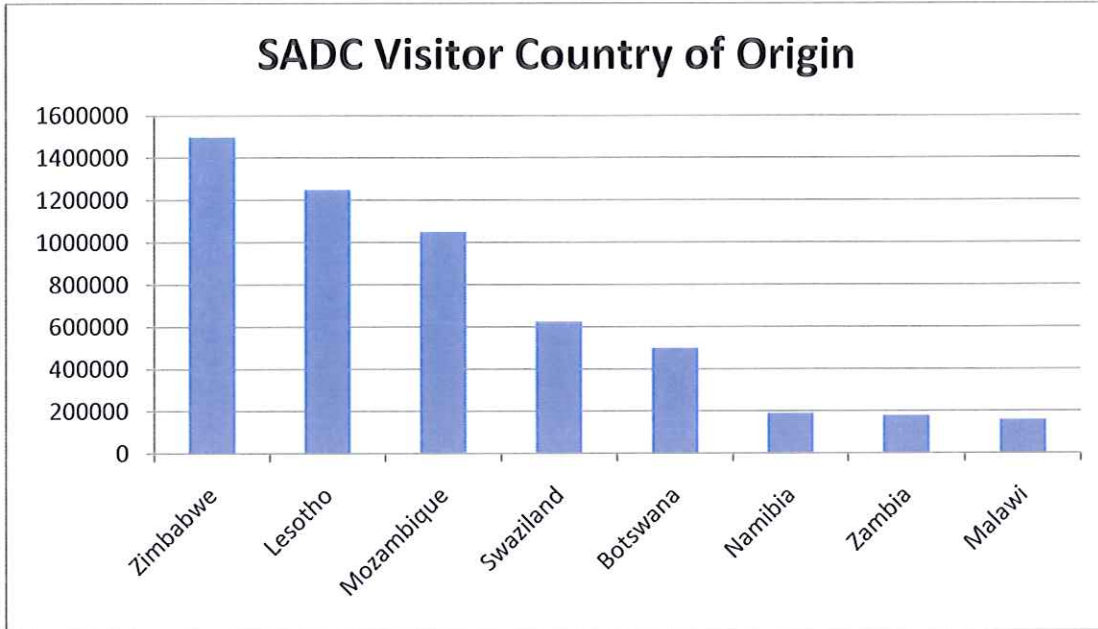
FIGURE NO. 2 Figure 2a: International Countries of origin for Travellers to South Africa



Source: Stats SA, 2010 Report

Figure 2b shows the SADC countries arrivals into the country dominated by Zimbabwe, Lesotho, Mozambique, Swaziland and Botswana with Namibia Zambia and Malawi having less than 200000 visitors.

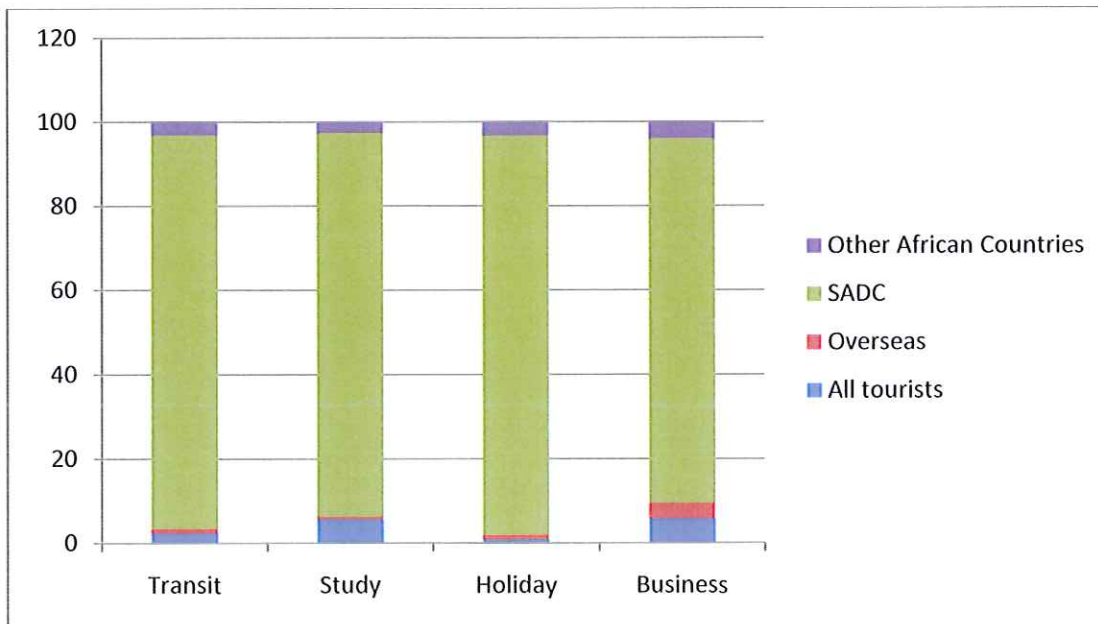
FIGURE NO. 3 Figure 2B: SADC Countries of origin for Travellers to South Africa



Source: Stats SA, 2010 Report

Figure 2C shows the distribution of purpose of visit for international travellers and includes African countries. Overall 93.6% of visitor arrivals indicated that the purpose of visit was for holidays or leisure, 3.1% business, 2.4% was in transit and 1% for study purposes.

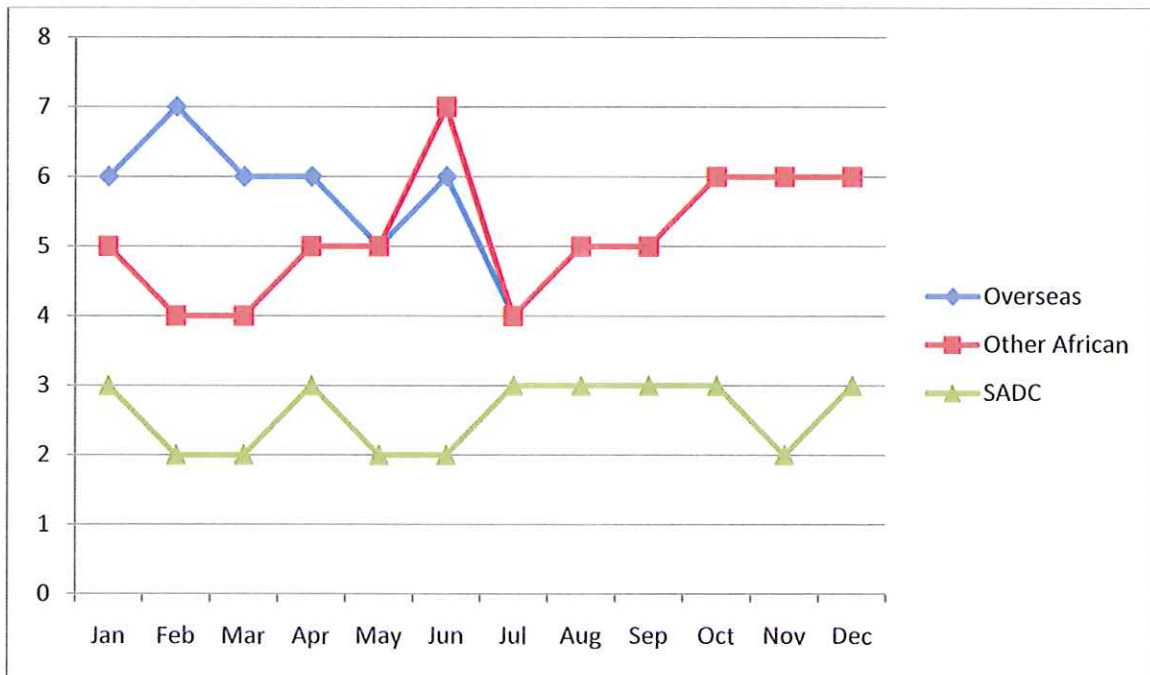
FIGURE NO. 4 Figure 2C: SADC Countries of origin for Travellers to South Africa



Source: Stats SA, 2010 Report

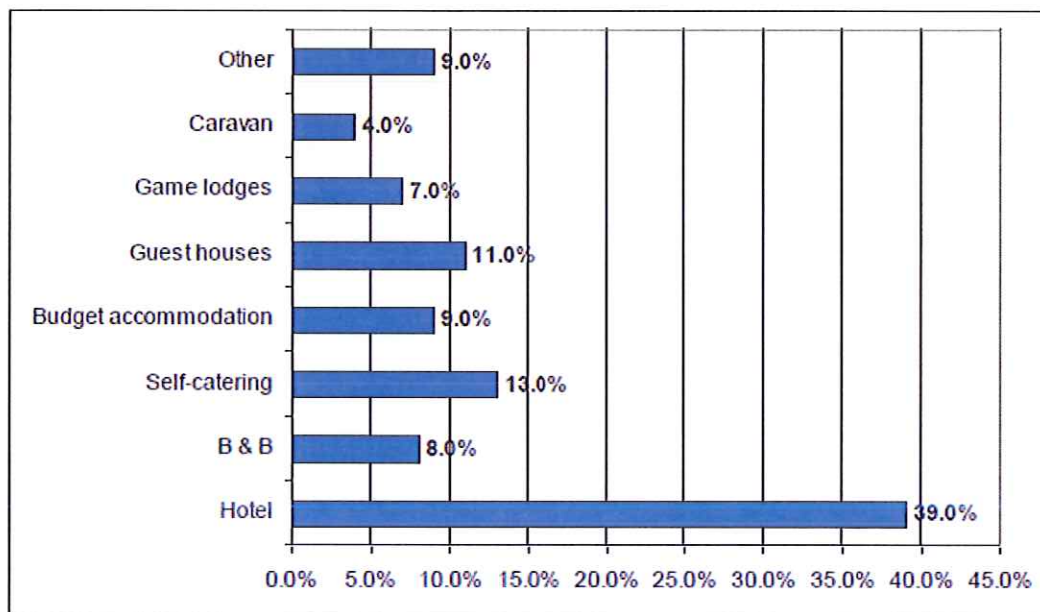
Figure 2d highlight that the international traveller stays on average longer than 5 days with the winter months dropping slightly in number of days however still above 4 days.

FIGURE NO. 5 Figure 2D: Median number of days stays by international travellers



Source: SA Stats 2010 Report

FIGURE NO. 6 Figure 2E shows the accommodation preference dominated by hotel stays and formal accommodation options.

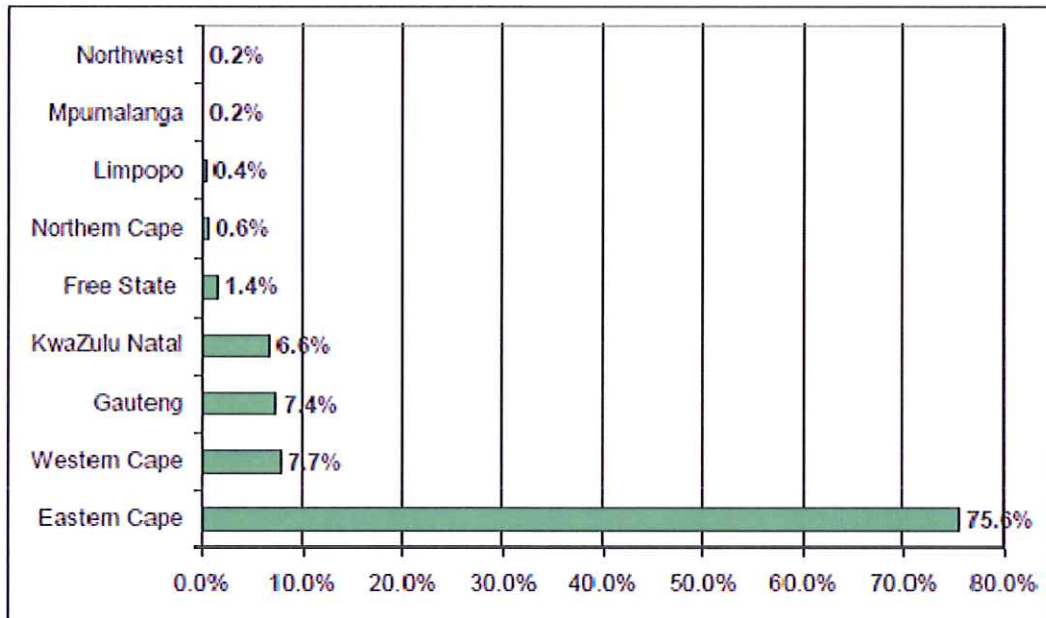


Source: Eastern Cape Tourism Master Plan Status Quo Report, 2008

C2. DOMESTIC TRAVEL

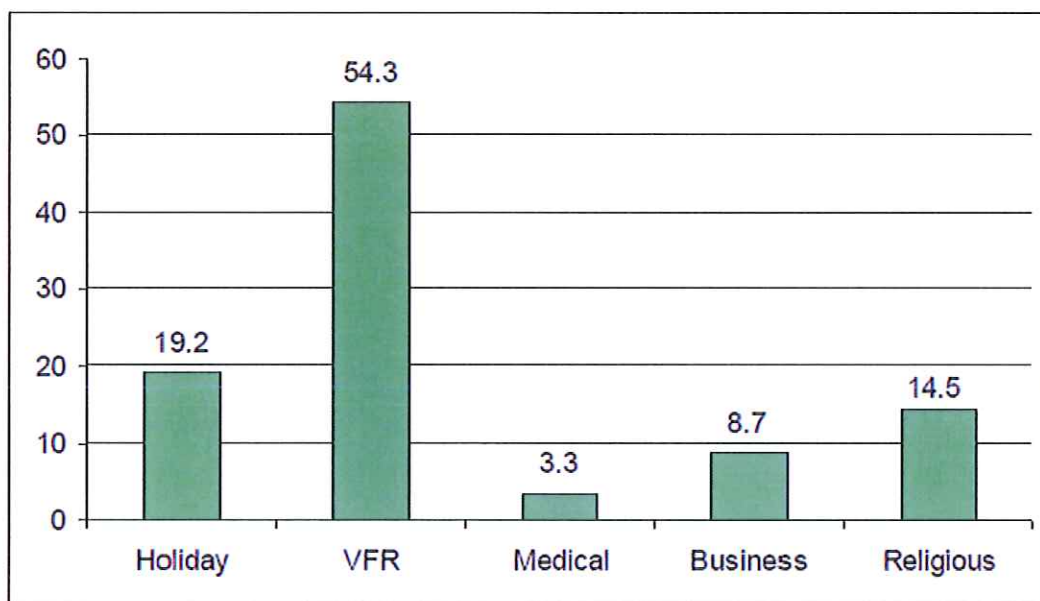
Figure 3a shows that the domestic traveller origin to the Eastern Cape is generally from within the province followed by Western Cape, Gauteng, Natal, Free State and other small quantities from other provinces.

FIGURE NO. 7 Figure 3a: Origin of Domestic Visitors



Source: Eastern Cape Tourism Master Plan Status Quo Report, 2008

FIGURE NO. 8 Figure 3b: Purpose of visitor of Domestic Visitors



Source: Eastern Cape Tourism Master Plan Status Quo Report, 2008

Fig 3b indicates domestic visitor purpose of visit VFR is a large market followed by holiday/ The Kei Mouth area can also experience locals receiving VFR visiting and could be making use of coastal resorts as a breakaway.

C3. LOCAL TOURISM CONTEXT

Kei Mouth Town is a rapidly expanding coastal town on the banks of the Kei River Mouth. Locals living on the other side of the Kei River cross it using a motorized Pont to access coastal resorts further along the Wild Coast such as Wave crest, Xologa Mouth etc.

The coastal resorts have relatively high occupancies as it is close to the East London urban centre and gained popularity with its beaches, outdoor activity and fishing.

In order to develop a development concept for the Cape Morgan Nature Reserve it is important to understand the current visitor market profile and their needs, that visits the area or nearby attractions.

The lack of a local tourism organization in the area and tourism statistic information availability resulted in the process of data collection both primary and secondary research methods have been utilized. It involved making use of travel publications, brochures, stakeholder inputs. Internet searches, telephone directory and survey.

A survey consisting of 16 questions was drawn up by Tshani Consulting CC to assist in evaluating the types of tourism services/facilities, market profile and needs in the Kei Mouth Town and its immediate surroundings (*see questionnaire*).

As the tourism providers accumulated, a database was created and a random sample of 16 product owners was identified in the Kei Mouth and surrounding area.

No tourism plan exists specifically for the Kei Mouth Area or the Greater Kei Municipal Area. Tourism products have developed in the area based on coastal developments extending along the coastline which offers opportunity for urban travellers to break away from the larger town centers. Tourism products /services are not graded and some belong to membership bodies however the majority is privately run.

The town of Kei Mouth consist predominantly of holiday accommodation and residents (mainly retired) and holiday homes which are owned b people living in the Eastern Cape and a further afield

The questionnaire targeted tourism product owners i.e. bed and breakfasts, self catering facilities, sports, etc.

C4. KEY ATTRACTIONS:

Key attractions can be listed as follows linkages and enhancements for a visitor experience are needed.

- ▶ *Beaches including all coastal resorts namely Kei Mouth, Morgan Bay and Haga Haga*
- ▶ *Kei River*
- ▶ *Lagoons*
- ▶ *Kei Mouth Golf club*

- ▶ *Strandloper Trail*
- ▶ *Horse trails*
- ▶ *Cape Morgan Nature Reserve*
- ▶ *Cape Morgan Light House*
- ▶ *Private Game Reserves*
- ▶ *Heritage route*
- ▶ *Wild Coast coastal resorts*
- ▶ *Stramotalite.*

C5. SURVEY ANALYSIS

A questionnaire was completed with 16 tourism products in the area, which can be broken into the following categories namely 75% accommodation facilities, 31% offered trails/tours and 12.5% offered food and drink.

The majority of 81% of the enterprises interviewed and currently trading have been in operation for more than 10 years with 18% of them being between 1-10 years. 62.5% had no affiliation to any marketing/funding body and 25 % supplemented their main business function by doing other business therefore are long established personal enterprises.

Based on the statistics received the following estimations can be made:-

- ▶ *Double room: Average of 12 rooms and total of 111 rooms.*
- ▶ *Beds: average of 2 beds and total of 20 beds.*
- ▶ *Family room average of 9 rooms and total of 88 rooms.*
- ▶ *Beds: average 3 and total of 32 beds.*
- ▶ *Luxury average 3 rooms and total of 15 rooms.*
- ▶ *Bed: average 2 and total of 12 beds.*
- ▶ *Single average 1 and total of 4 beds.*
- ▶ *70% had no camping facilities and 30% did provide.*
- ▶ *Occupancy ranged from 41% - 84% throughout the year.*

The 4 last months of the year occupancy levels increase and might be motivated as domestic markets travelling prior to school holidays and then a combination with school holidays.

Relatively low occupancy has been identified throughout the weekdays, calculated at 31% and increases to 68% -75% from Fridays and over weekends.

The majority of 69% of establishments charged between R1-800 and 31% charged R800 plus; 62% indicated that they altered their prices according to high/low season.

All respondents indicated that they make use of internet marketing and word of mouth spread, 43% made use of paper media.

A challenge experienced during the study was that a lot of existing documentation, such as brochures or guides, does not accurately reflect the status quo, as some of the enterprises do not belong to a specific membership body and/or cannot be clearly identifiable.

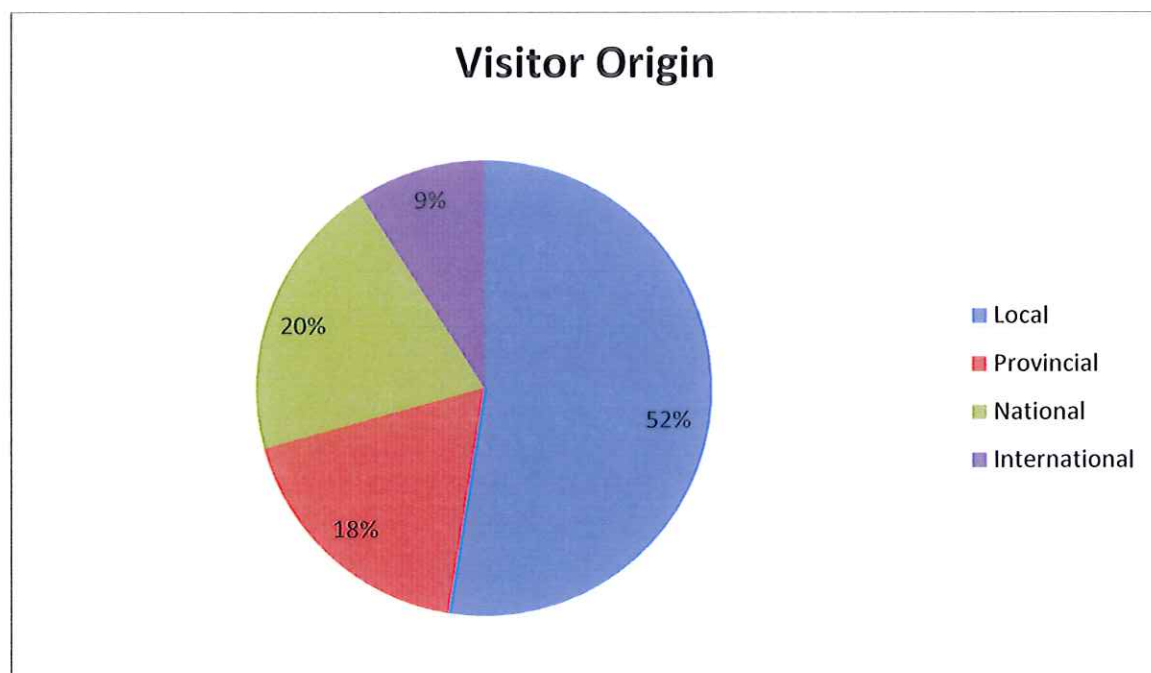
C6. KEY ISSUES

The following key issues were identified as part of the surveys and /or workshops:-

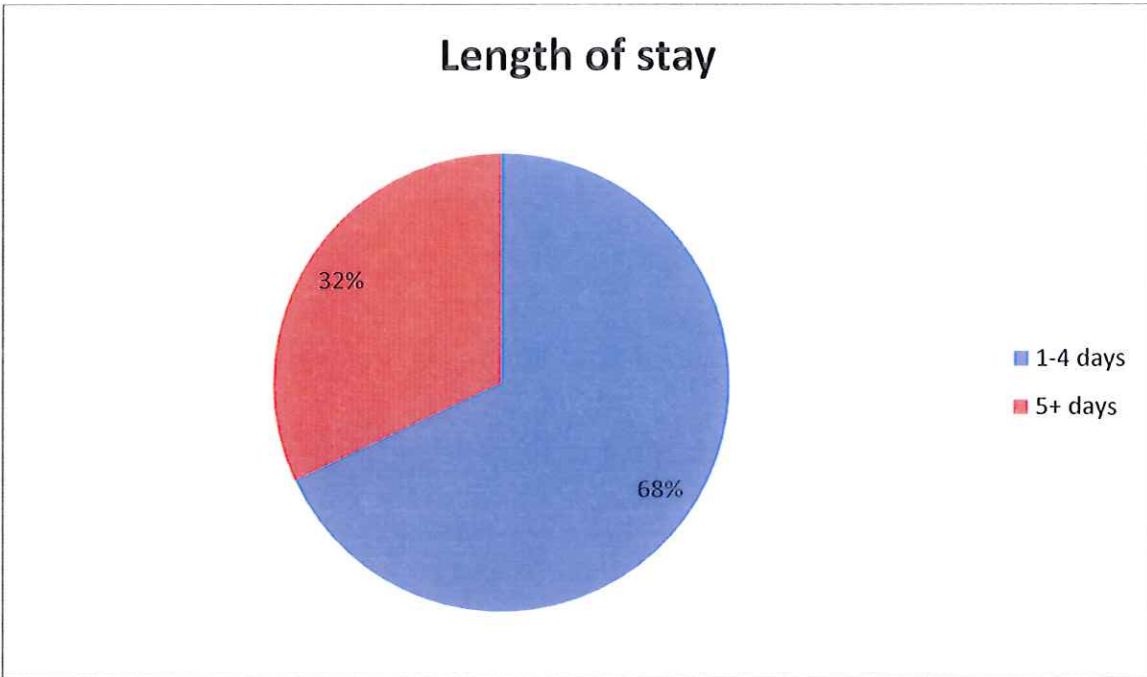
- ▶ *No active tourism route/marketing;*
- ▶ *Limited or lack of Signage;*
- ▶ *Tourism product operating in isolation;*
- ▶ *Lack of entertainment facilities;*
- ▶ *Access and parking problematic; and*
- ▶ *Limited or lack of service delivery.*

C7. VISITOR PROFILE

In terms of visitor profiles respondents indicated that 52% of their visitors originated from the surrounding /local areas and 18% were from within the province origin, 20% national and 9% international origin.

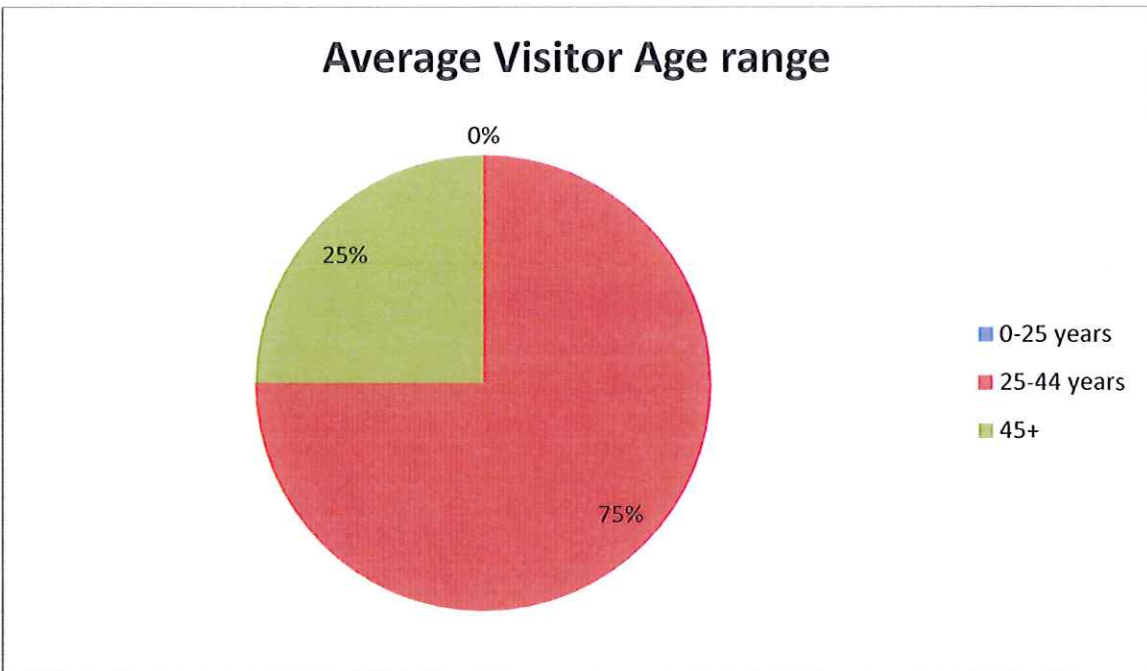


The origin of the visitors are also characteristic to the length of stay as domestic visitor “stays” are between 1-4 days and international visitors generally stay longer i.e. 5 days plus. It was found that the respondents indicated that 68% of visitors stay 1-4 days and 32% stay 5 days plus. This could also involve domestic travellers that tend to also book coastal resorts for weekends.



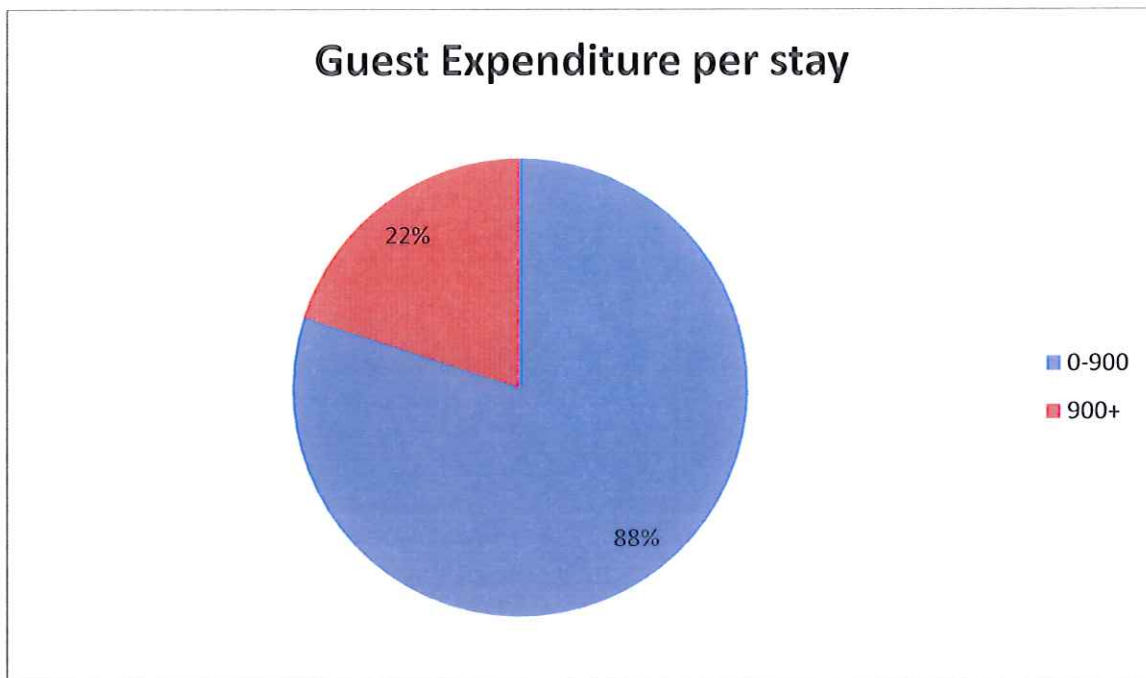
In terms of the "Purpose of visit", all respondents indicated that all the visits to their establishments were for "leisure activity."

75% of the visitor market age range between 25 -44 years and 25% was 45 + years.



100% of visitors were self-drive 88% was sedan vehicle and 12% was other that included 4x4.

Respondents estimated that 88% guest expenditure was between R0-900 AND 22% was above R900.



C8. CONCLUSION

The questionnaire has revealed that the majority of the visits are of domestic origin which includes day visitors which only pass through the area. This is a lucrative market and is easy to penetrate with tactical marketing efforts. There are a small number of international visitors that can be drawn by the renowned “Strandloper Trail”, THIS is a more difficult market to penetrate however, and the daily expenditure is much higher. The purpose of these visitors visit is generally for leisure purposes which can include the beach, site seeing, fishing and trail exploration. The guest expenditure also indicates that there is relatively low income generated per stay and can be explained that there is limited entertainment activity in the area.

It is important to assess the current tourism trends experienced by the tourism industry. South African Tourism Statistics reveal that 43.7% of South Africans undertake travel, which averages to approximately 2.8 trips per year. Domestic travellers generated 36 million trips in 2007 compared to 9.1 million by foreign travellers. Therefore the domestic market is a greater and more reliable market however, domestic travelers spent R21.3 billion compared to R60 billion spent by foreign travellers. Foreign Tourists tended to prefer more formal accommodation options and spent larger amount of money than domestic tourists. The domestic holiday market is concentrated at 87% from Gauteng, Western Cape, Eastern Cape and Natal. 33% of the domestic spend in the Eastern Cape comes from Gauteng with an average expenditure of R1315 per trip compared to R351 for VFR. Shopping and involvement in ecotourism activity was a similar preference by both domestic and international tourists. Based on analysis it identified the need for tourism attractions. For the CMNR it will be required to offer formalized activity and linkages to existing products, comfortable, clean accommodation, safe and comfortable access, proper amenities and the correct market mix.

C9. IMPLICATIONS

Based on surveys and statistics visitors to Kei Mouth are predominantly domestic visitors originating from local towns Gauteng and the Western Cape.

They are generally holiday or leisure market that enjoy the coastal attributes, shopping and site seeing. Occupation levels are relatively high and seasonable trends show peak seasons that indicate an increase in demand for accommodation. During Peak seasons, based on consultations with stakeholders, there is an accommodation shortage icon attractions such as strandloper trail with more formalized activity and facilities will complement the existing demand. Based on statistics formal accommodation is the first preference for international tourists followed by domestic tourists.

SECTION D: SWOT ANALYSIS

The following SWOT analysis has been completed in the workshop for the study area:

▶ STRENGTHS:

- *Eco system unique*
- *Existing buildings*
- *Open area*
- *Stromatrolites _ protection*
- *Strandloper trail*
- *Eco centre*
- *Natural beauty*
- *Golf course*

▶ WEAKNESSES:

- *Access roads beach facilities*
- *Lack of parking*
- *No beach*
- *Lack of accommodation*
- *Infrastructure-water sewerage: compliance*
- *Tourism season*
- *Lack of law enforcement*

▶ OPPORTUNITIES:

- *Linkage to double mouth*
- *Introduction of indigenous animals*
- *Creation of trails walkways*
- *Expansion of reserve opportunity*
- *Caravan park*
- *Craft centre*
- *Medicinal plant nursery*

▶ THREATS:

- *Pollution_ sewerage ponds*
- *Eco system*
- *Community demands*
- *Kei mouth*
- *Strengths*

- *Wreck*
- *Heritage and history*
- *Bird sanctuary*
- *Massive dolerite dyke*
- *Tar road*

SECTION E: VISION

Due to the ecological integrity of the CMNR and the fact that it is the only piece of coastal forest which with it's current ecological status; the stakeholders requested that a long and short vision be developed for the area.

E1. SHORT TERM

“Maintain the existing ecological integrity of the reserve and allow people to have more access to the reserve and for the reserve to be developed in the already impacted areas.”

- ▶ *The short term plan aims to keep the appearance of the reserve as is. This is achieved by: not creating any high rise buildings, working within the land that has already been developed, improving the nature system without compromise, and focusing development on disturbed areas.*
- ▶ *One of the other aims look at increasing more leisure activity. These activities will result in a revenue income that will go back to the Cape Morgan establishment.*
- ▶ *Further revenue makers are achieved through: linking of the golf course and nature reserve, proper fencing and improvement of basic infrastructure such as roads (make paths accessible), proper monitoring/law enforcement of these developments and controlling of which areas are accessible or not.*
- ▶ *Introduction of wildlife and proper signage such as: vegetation info boards, footpath indicators and general info boards, achieve a well established nature reserve to attract local visitors.*
- ▶ *Other short term goals include; locating disabled areas, promoting education and accommodation facilities, establishing more guided trails, providing caravan parks.*
- ▶ *Finally the short term goal looks to promote heritage of area and establish successful a relationships between local community and the community of the reserve to increase tourism.*

E2. LONG TERM

The long term goal looks at incorporating all the ideas presented in the short term plan but in a larger scheme that creates, improvement for the future of the reserve as well as the Kei Mouth community.

- ▶ *To expand the nature reserve to include the two adjoining properties, the golf course and develop a larger tourist facility.*
- ▶ *Aims to enlarge the reserve by mimicking the biodiversity onto adjacent land across the road.*
- ▶ *Restoring of the disturbed areas as in indicated in the short term goal*
- ▶ *Relocating the oxidation ponds to prevent water seepage into the sea.*

- ▶ *Eradication of all alien plants in the area.*

SECTION F: DEVELOPMENT IDEAS

The public participation process as part of a brainstorming session with the stakeholders was carried out, the ideas which amented from this process is captured in the following five categories.

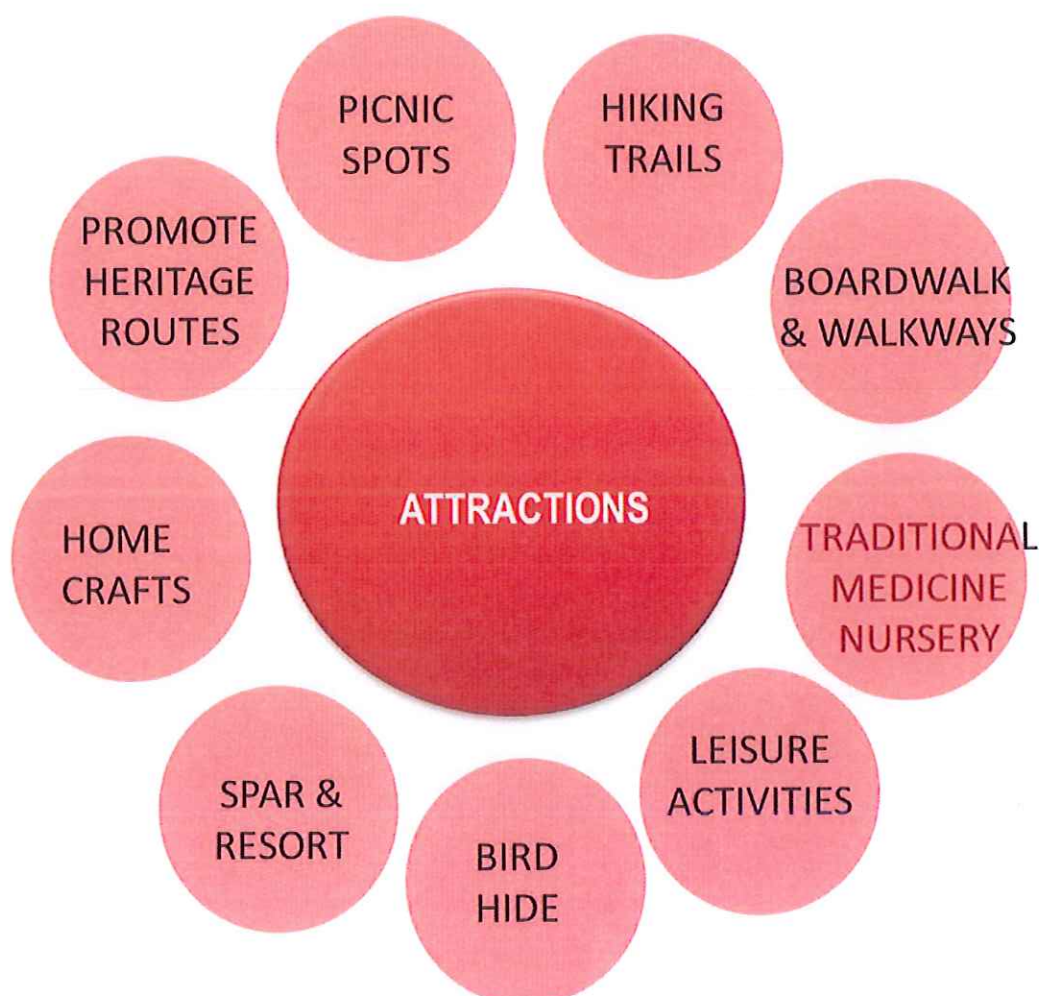
F1. NATURE RESERVE/CONSERVATION

- ▶ *Expand the reserve to the above grasslands.*
- ▶ *Locate the sensitive areas and protect them.*
- ▶ *Keep the reserve as natural as possible.*
- ▶ *Have areas in the reserve to be owned by the community.*
- ▶ *Develop the reserve to its natural state.*
- ▶ *Create bird hide to bring in natural wildlife.*
- ▶ *Develop natural walkways.*
- ▶ *Promote the growth of existing flora and fauna.*
- ▶ *Introduce wild life.*
- ▶ *Erect fencing around the area to protect the reserve.*



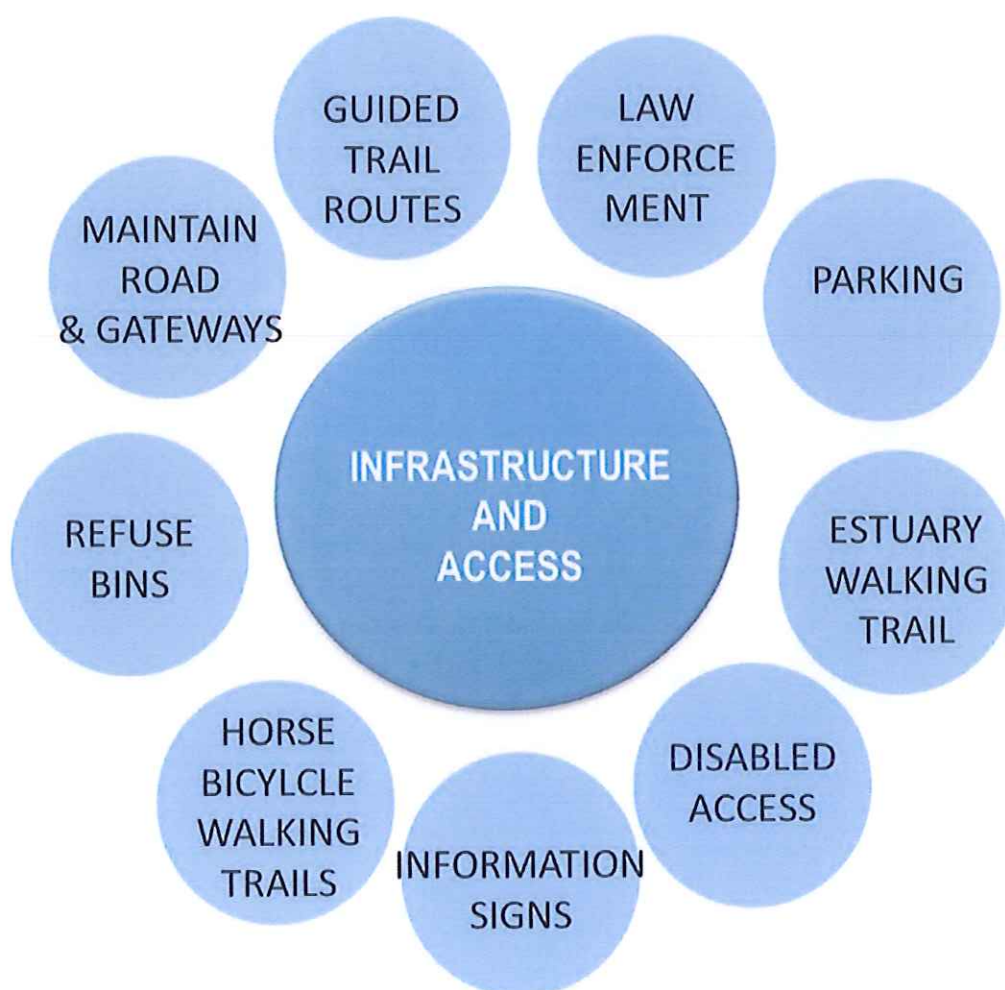
F2. ATTRACTIONS

- ▶ *Promote existing heritage route such as old mine routes.*
- ▶ *Picnic spots for people to stop and eat along the coast.*
- ▶ *Create trails that accommodate all the following three types: hiking/walk trails, horse trails, bicycle trails.*
- ▶ *Boardwalk along beach (natural/ manmade).*
- ▶ *Establish traditional medicine nursery where members can grow and sell plants found in the reserve.*
- ▶ *Provide leisure activity such as surfing, horse hires, car hires for drives around the park promote golfing, bird hide visits shell museum etc.*
- ▶ *Create a spa and resort where day visitors can stay.*
- ▶ *Promote home crafts where local craftsman can sell their products.*



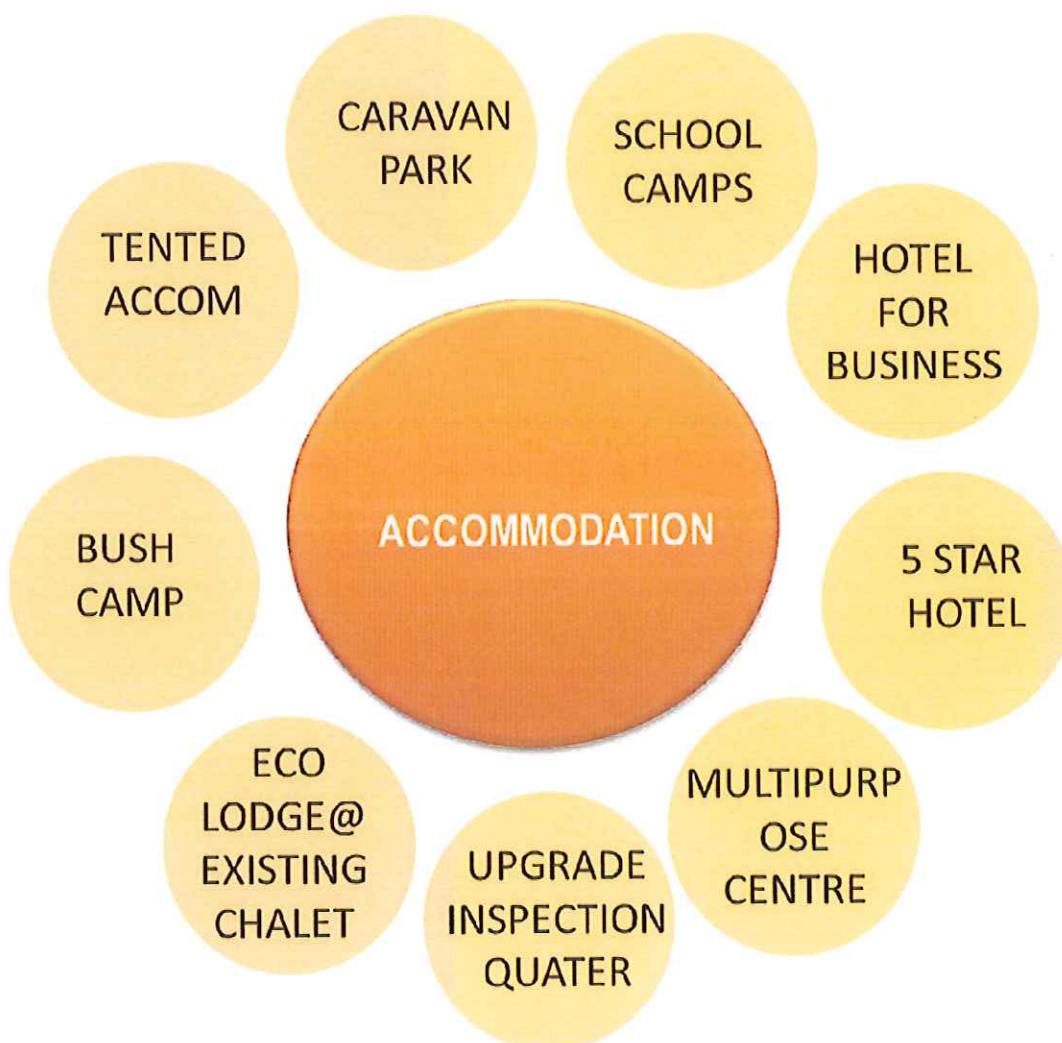
F3. INFRASTRUCTURE AND ACCESS

- ▶ *Maintain road, the road plays a big part in attracting people to the area. If access isn't properly established tourism can't be properly developed.*
- ▶ *Guided trail routes to give hikers direction and a sense of safety.*
- ▶ *Improve law enforcement for safety and security.*
- ▶ *Provide parking.*
- ▶ *Establish a prominent gateway that marks the area.*
- ▶ *Create guided trails along the estuary.*
- ▶ *Allow for disabled access.*
- ▶ *Maintain existing Information signs and put up more.*
- ▶ *Upgrade existing horse, bicycle and walking trail.*
- ▶ *Place refuse bins in areas with high human traffic.*



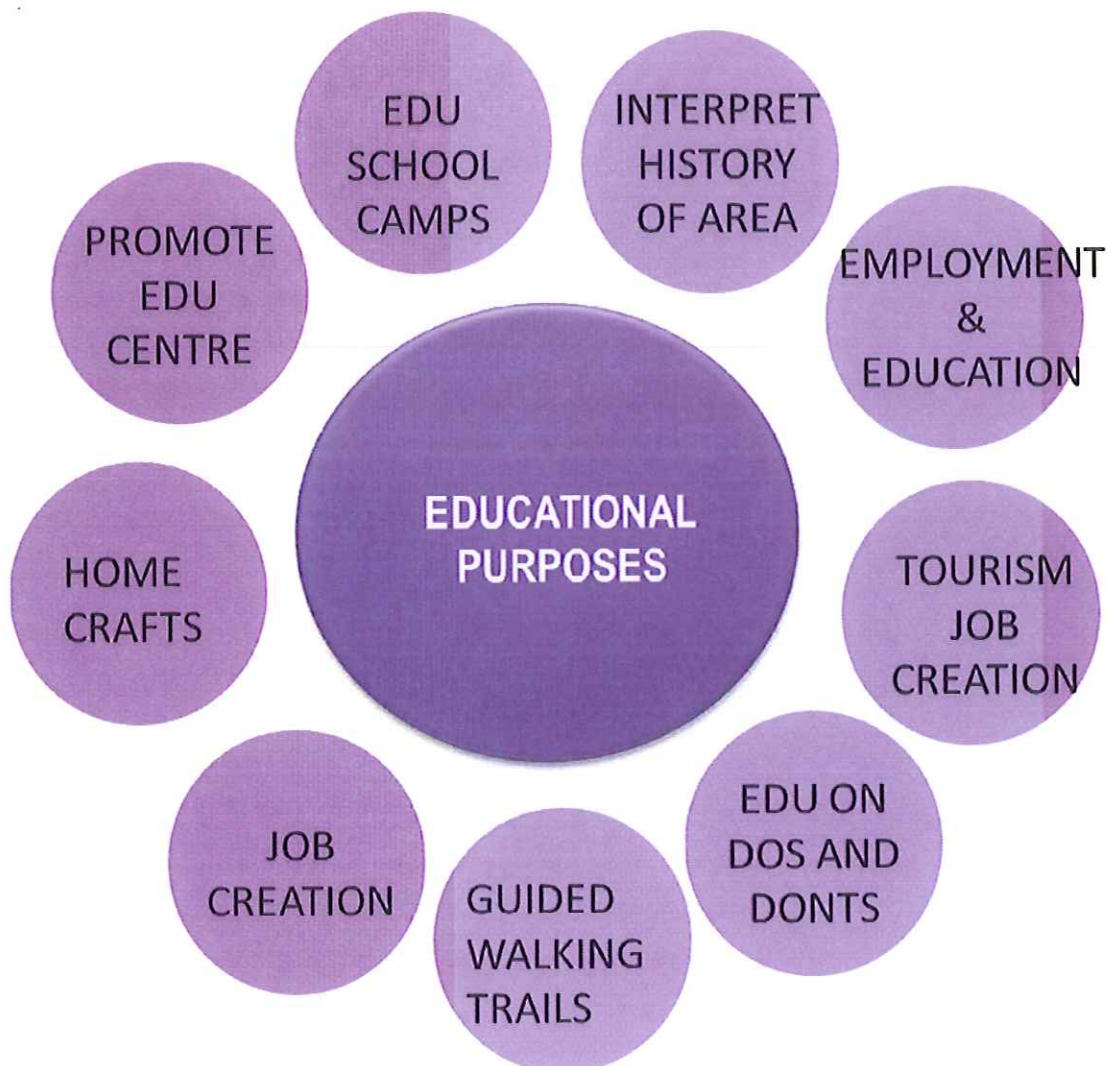
F4. ACCOMMODATION

- ▶ *Establish a small bush camp.*
- ▶ *Provide temporary tented accommodation.*
- ▶ *Mark out caravan park areas.*
- ▶ *Create enabling environment for school camps.*
- ▶ *Establish a hotel to accumulate revenue (at least one 5 star hotel).*
- ▶ *Create multipurpose centre that can act as a conference room or open space for various. Activates.*
- ▶ *Upgrade inspection quarters.*
- ▶ *Establish an environmentally friendly lodge at existing chalet.*
- ▶ *Parking*



F5. EDUCATIONAL PURPOSE

- ▶ Home crafts learning areas, where older community can teach the younger generation on various crafts.
- ▶ Institute an education centre.
- ▶ Establish school camps for kids from nearby schools.
- ▶ Interpret history of the area and make it available to the public.
- ▶ Provide employment for various education establishments.
- ▶ Create tourism and job opportunities.
- ▶ Educate public on the dos and don'ts when within the nature reserve.
- ▶ Provide guided walking trails with information regarding biodiversity of the reserve.



SECTION G: CONCEPT

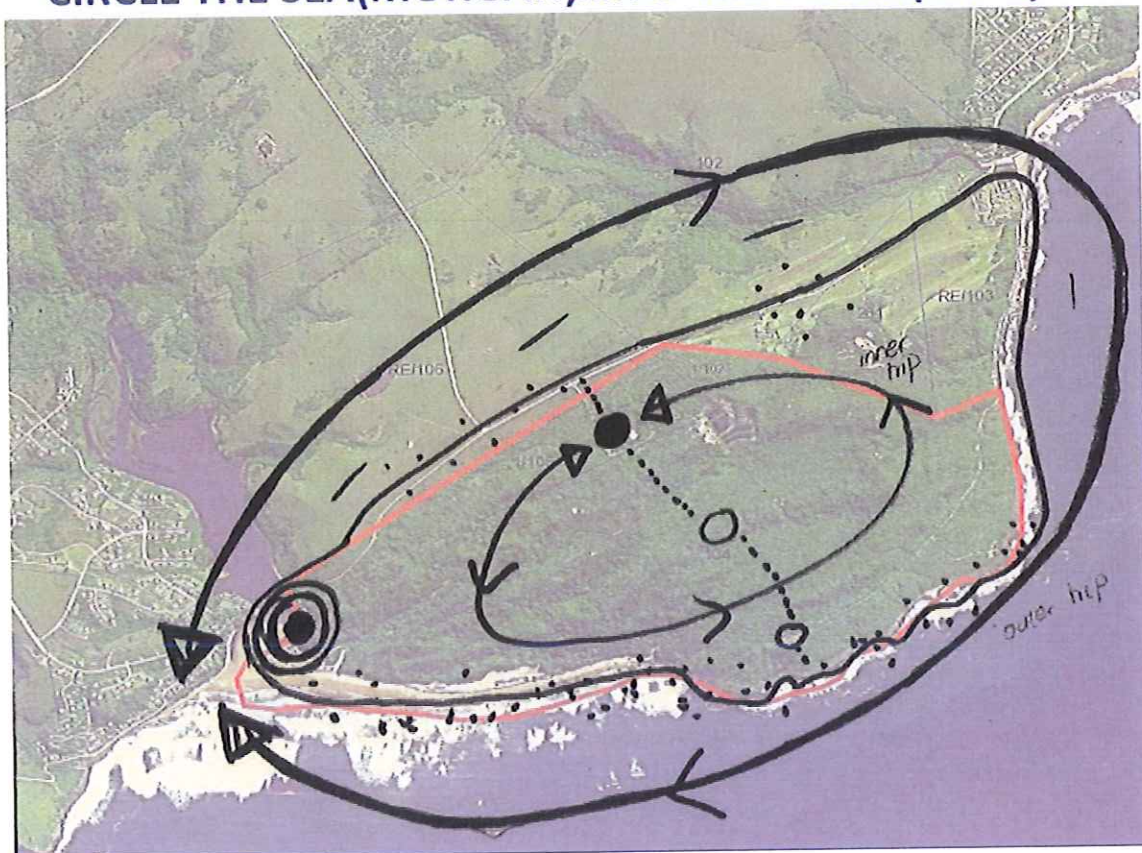
With information received from the stakeholders the professional team was able to develop the following concept:

Research on the name of the lighthouse “Cape Morgan” revealed in simple terms that “Cape” refers to a “point of land” and “Morgan” refers to “to be around the sea”, or “to circle the sea”. The concept of a lighthouse itself is to protect ships, which is the ultimate vision of which the reserve tries to accomplish.

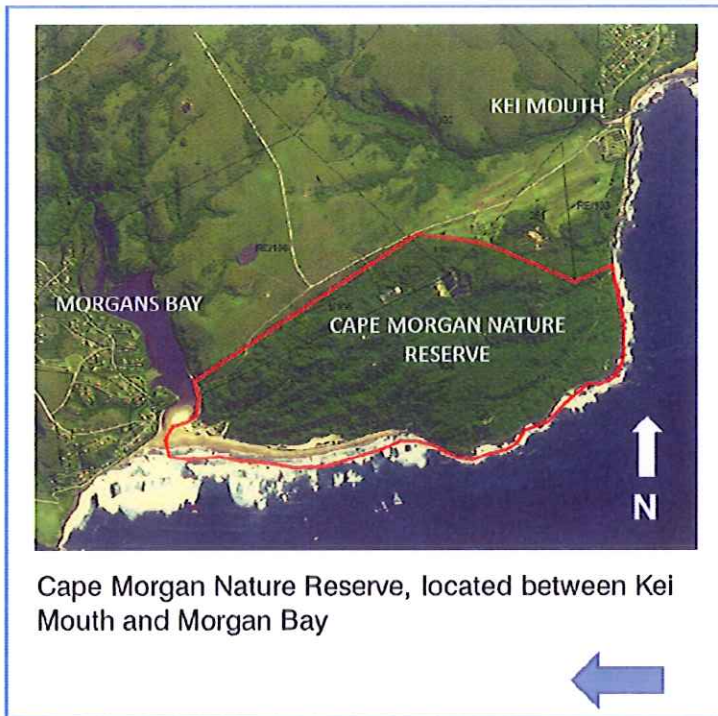
The reserve is located in-between Morgan Bay and Kei Mouth approximately. It acts as a point in which the two towns (Morgan Bay and Kei Mouth) can be linked through the use of a boardwalk trails along the coast or a hiking trail through the reserve.

There are two existing routes: the “Phalo Amatola Route” and the “Strandlopers Route.” These hikes are longer than one day, so in our circular journeys around the reserve we want to not only interact with various activates along the route, but also reach a final point of destination (the “Cape”). This will be our special place of development, the place that has most potential to create revenue. At the same time we will incorporate the Cape Morgan light house as another mini-point that is part of the journey.

CIRCLE THE SEA(MORGAN)...TO THE POINT(CAPE)



PLAN NO. 1: IMAGE BASIC CONCEPT DIAGRAM



PHALO ROUTE
Popular hiking routes require more than a day we will like to create a hike that entails only one day. Followed by various other activities in the area to keep guests occupied

STRANDLOPER ROUTE(3-4)



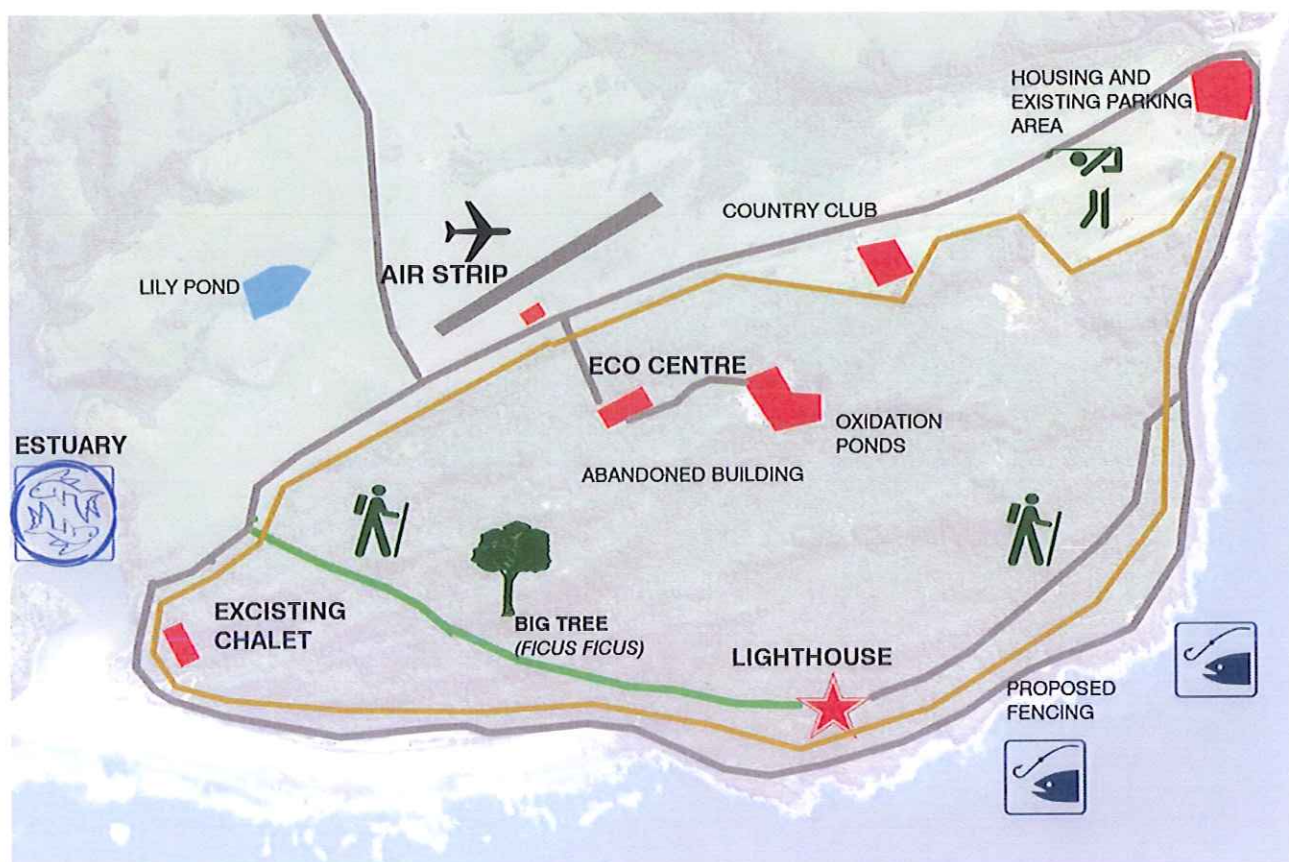
PLAN NO. 2: MAP INDICATING CMNR , PHALO ROUTE AND STRANDLOPER TRAIL.

SECTION H: SCENARIO OPTIONS

the following four scenarios were developed and discussed in a public workshop:

H1. SCENARIO ONE (FUNDAMENTALS)

- ▶ Scenario one involves your entire basic “fix up” or the starter revenue makers.
- ▶ Scenario one includes:
 - *Improvement of road infrastructure*
 - *Fencing and protecting (circle/encompass) of the reserve*
 - *Expanding the golf reserve*
 - *Maintaining the existing areas and hiking trails*
 - *Creating proper signage with a more prominent gate and unique emblem for the reserve*
 - *Protecting the estuary from fishers*
 - *Creating a simple boardwalk along the coast either; sand gravel or patches of wooden trail*
 - *Maintaining the exiting places of interest such as; the lighthouse and shell museum*
 - *Proper refuse removal*
 - *Public faculties such as public bathrooms*
 - *Improving safety and security in the area and along the walking paths*



PLAN NO. 3: MAP SCENARIO 1

H2. SCENARIO 2 (MAJOR DEVELOPMENT)

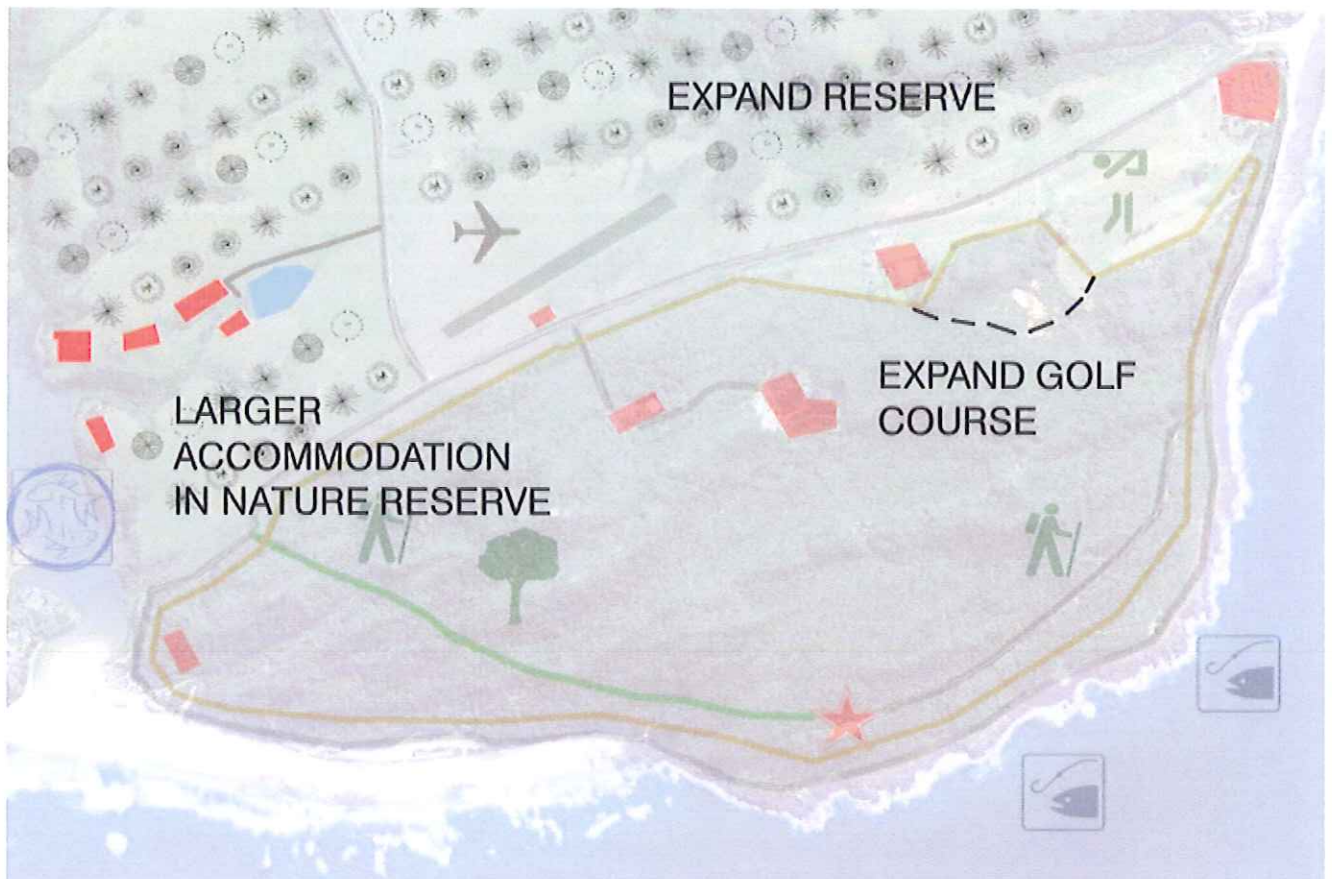
- ▶ Scenario two encompasses all the ideas presented in scenario one and all the other possible ideas that will promote maximum development.
- ▶ Scenario two includes:
 - A 100 room accommodation at west point of reserve.
 - Board room facilities restaurants cafeterias to facilitate the 100 room accommodation.
 - Parking on the west side of the reserve
 - It also looks at maintain the buildings at the eco centre and expanding with more educational facilities.
 - Establishing a school camp for children from nearby schools
 - medicinal plant nursery to sell plant from the reserve
 - provide a caravan parks and parking at the eco centre
 - Starts to locate picnic/look out spots
 - Create a Home crafts shelter
 - Includes all the ideas presented in scenario one.



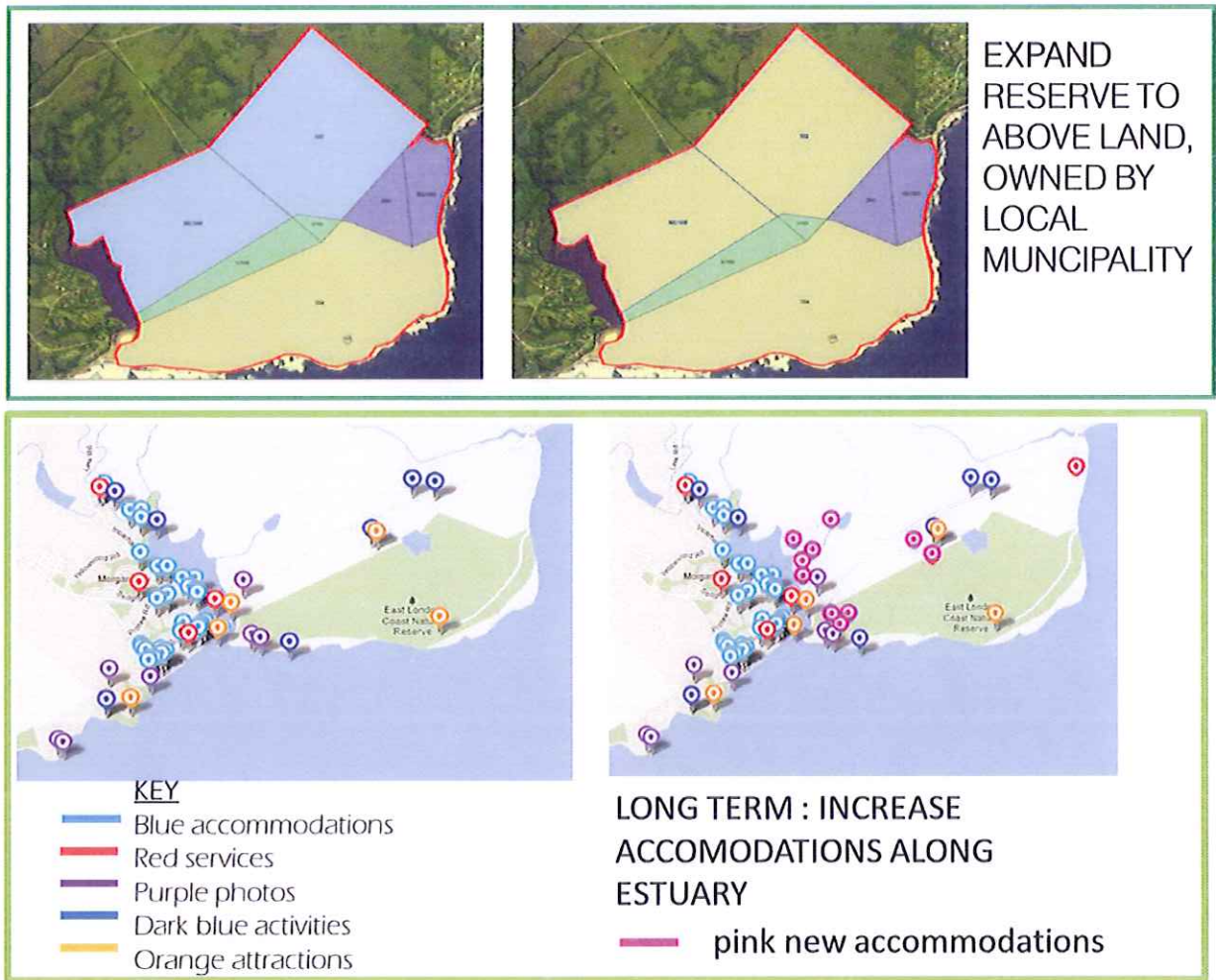
PLAN NO. 4: MAP SCENARIO 2 + 1

H3. SCENARIO 3 (FUTURE PLAN)

- ▶ Scenario three looks at the potential future design of the reserve, which is to expand the reserve to the adjacent grass land that is currently owned by the municipality.
- ▶ Scenario three also includes:
 - *The incorporation of community farm animals for grazing, as part of the up keeping of the area.*
 - *Developing establishments in the adjacent grass land and further along the estuary.*
 - *Incorporating the golf course in the extended area.*
 - *Includes all the ideas listed in scenario one.*



PLAN NO. 5: MAP SCENARIO 3 + 1



PLAN NO. 6: VARIOUS PLANS DEPICTING SCENARIO 3

H4. SCENARIO 4(FINAL PROPASAL)

- ▶ Scenario four looks at a compromise solution, so as to develop and create revenue without affecting the reserve or expanding across the reserve.
- ▶ Scenario four includes:
 - A 50 room accommodation with small restaurant and cafeteria
 - Various hiking trails
 - A small school camp
 - Traditional medicinal nursery
 - Basic parking to the beach and at Kei mouth
 - Includes all the ideas listed in scenario one.



PLAN NO. 7: MAP SCENARIO 4 + 1

SECTION I: PREFERRED SCENARIO

It was agreed that Scenario 4 be the preferred scenario.

SECTION J: CONCLUSION

Based on the outcome of the workshop, architectural impressions will be developed and the professional team will begin on the next phase: financial viability.

QUESTIONNAIRE

	<u>Monthly</u>
Electricity/gas	R 2 500,00
Diesel for generator	R 1 500,00
Tele fax	R 500,00
Advertising	R 2 500,00
Postage	R 100,00
Repairs and maintenance	R 1 000,00
Audit fees	R 500,00
Printing and stationery	R 300,00
Cleaning material	R 400,00 (maximum)
Staff training allow	R 1 000,00 to begin with
Insurance	R 500,00
Salaries and Wages	R 26 500,00
Bank charges	R 400,00
Groceries	<u>R 10 000,00</u>
Total	<u>R47 250,00</u>

INCOME ASSUMPTIONS

Cost in season per night R300,00 per person }
 Out of season R250,00 }

COST INTO ACTIVITIES AREA

R40,00

NB: Tour guide will first give an overview of history (Xhosa)

Extra Donkey rides

Adults R 20,00
 Children R 15,00

Horse rides

Adults R 20,00
 Children R 15,00

Boat Cruises

Adults R 150,00
 Children R 100,00