

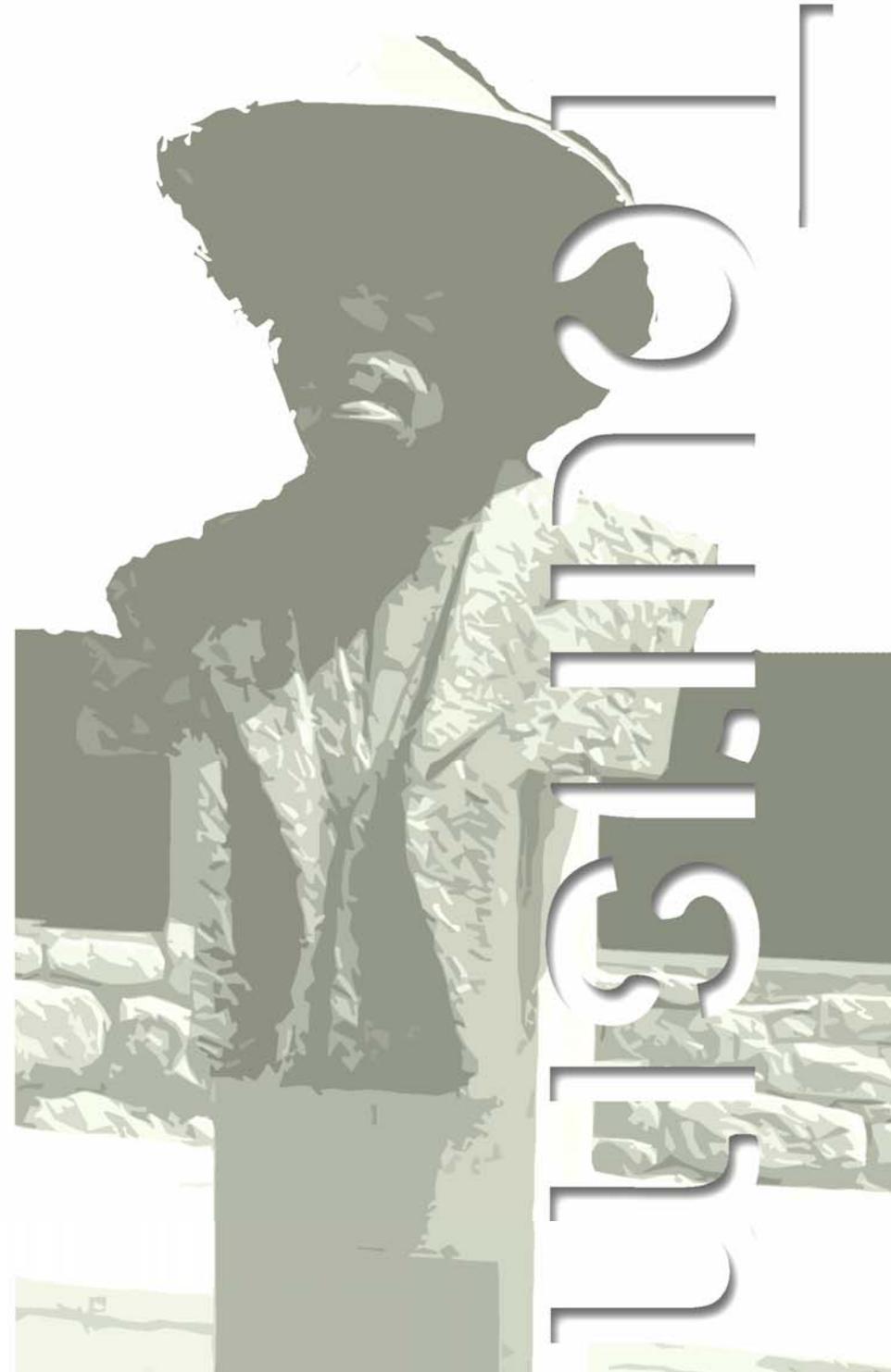
“A positive future is not a spectator’s future,
it’s a participant’s future.”

Philip Spies (Bowles 2004:14)



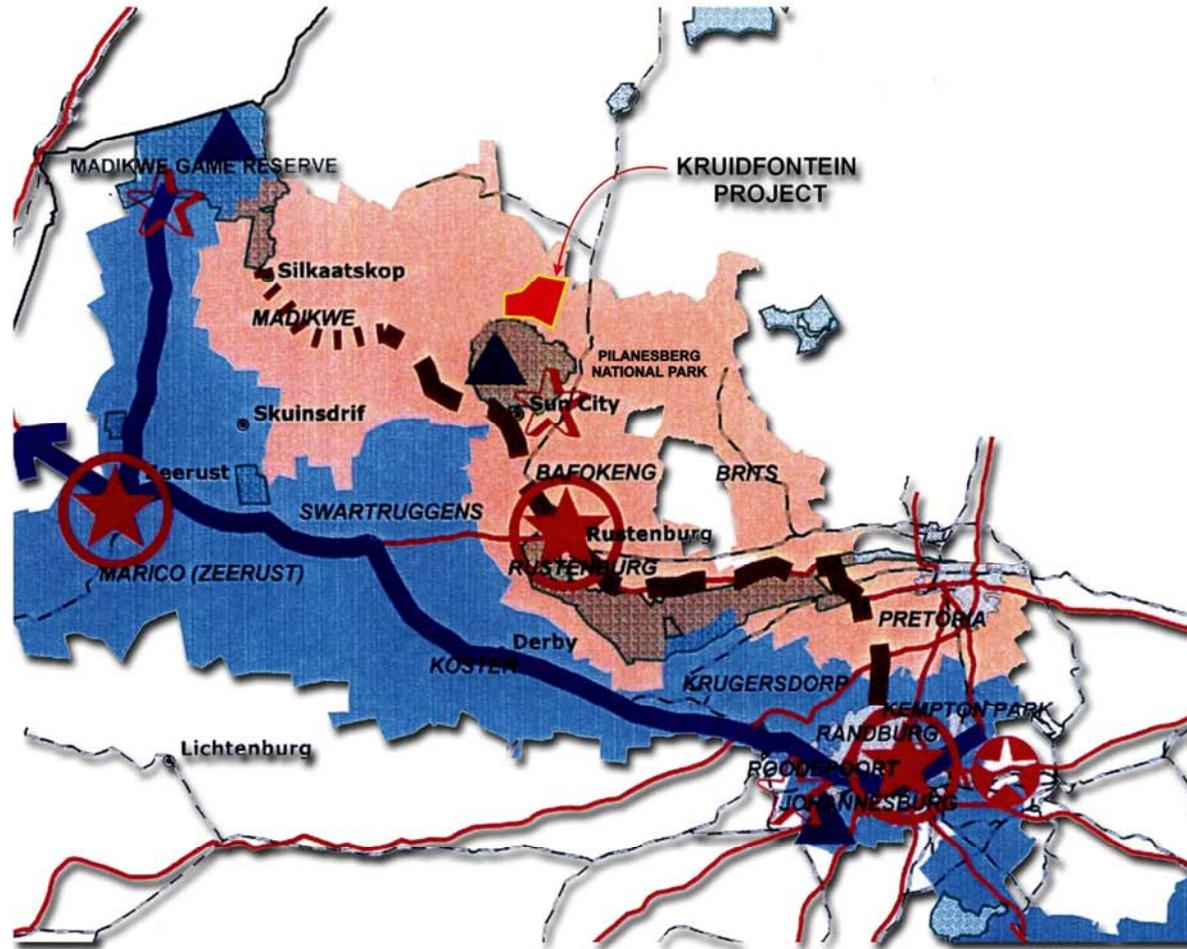
GTOURISM

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Priority area for tourism infrastructure investment

Figure C.1



Legend

- Parks and reserves
- Urban areas
- Railroads
- National roads
- Towns

Magisterial districts

- Along primary route
- Along alternative route

Route type

- Primary route
- Alternative route
- Untarred road

Symbols

- ☆ Staging post
- ☆ Gateway
- ☆ Distribution point
- Tourist destination
- Tourist destination



Tourism

Introduction

Tourism in the Pilanesberg area might well be a second industry that can grow alongside mining operations. With careful planning and innovative design outcomes the tourism industry can act as a mitigation measure against the typical stresses mining can exert on a specific region.

The following tourism initiatives have been considered:

- Pilanesberg National Park to the south of the proposed Kruidfontein Project;
- the proposed extension of Pilanesberg National Park to the north-east by incorporating the Pilane Reserve (also part of the Heritage Park Concept);
- the proposed Heritage Route;
- the Madikwe Area PATII, a route from Johannesburg to Madikwe Game Reserve as an Priority Area for Tourism Infrastructure Investment (PATII) initiative;
- tourism initiatives within the North West Province Master Plan;
- the Platinum Spatial Development Initiative (SDI).

C. 1 Pilanesberg National Park

An immediate strategy identified by PNP, is to phase out accommodation facilities and visitor comfort stations from the basin (centre) and to explore new opportunities on the periphery. The peripheral development should include the facilitation of new developments outside PNP that can divert this internal pressures, stimulate the creation of new regional products and generate new opportunities for local communities.

As part of the PNP's Land Expansion and Incorporation Objective, it is recognised that certain expansion opportunities exist along the periphery of PNP that may add significantly to the biodiversity and the size of PNP. Contour Project Managers (2000) continue to state that every effort should be made to ensure that these

areas are incorporated into PNP, as this can expand the socio-economic benefits from PNP through new tourism projects and can offer new commercial opportunities for neighbouring communities and land owners. It was proposed to incorporate the Pilane Reserve as on of the incorporation and expansion initiatives.

C. 2 Pilane Reserve and Heritage Park

The concept of the Heritage Park will be to establish a conservation corridor linking Pilanesberg National Park (PNP) and Madikwe Game Reserve as a nature-based tourism anchor project and primary economic catalyst for the region. This proposed Heritage Park Project could be the synergistic culmination of a number of regional initiatives that identified the need and the potential for further development in this area (Contour Project Managers, 2001).

The Heritage Park Project is proposed between other existing Protected Areas and can become the catalyst in launching an important regional initiative. It has the potential to link up with a number of other regional projects such as Marakele, Welgevonden, Thaba Tholo, Atherstones and Rhino Eco-Ranch to form a significant Conservation Area of some one million hectares.

It is anticipated that full incorporation and development of the corridor over a period of twenty years should keep track with the current growth trend in tourism markets for this region. It is also stated that a major advantage of this proposed project is that the land (surface rights) is predominantly owned by the state and mainly used by a community (various tribes in the area) that is generally in favour of such an endeavour, provided adequate benefits to the community at large and compensations to current occupants could be generated by the project.

The land earmarked for incorporation into the proposed Heritage Park includes the Pilane Reserve, which is seen as a compatible conservation initiative. The Pilane Reserve is a joint venture currently being negotiated between the Bakgatla BaKgafela community, the private sector and the North West Parks and Tourism Board (NWPTB), to develop the land as a Big Five area for incorporation into PNP. (S.E.F. 2001: 137-139)

C. 2.1 Tourism Demand Analysis

The aim of the market assessment and product options study was to identify the realistic market demand, site potentials and capacities for the proposed PNP and MGR expansion areas.

MGR contributes 30% of total room supply while PNP contributes 70%. MGR focuses mostly on products in the up market range, while PNP has a large proportion accommodation available in the mid- and budget market range. The supply and demand analysis shows a slight oversupply of mid-to-up market rooms and a shortage in the mid-to-budget and budget accommodation supply in the HP area. Although the upper end of the market might be slightly saturated, it has high growth potential and would still require additional products within the short to medium term.

C. 2.2 The survey results of the proposed products to be included in the HP are summarized below:

Products	Verdict	Recommendations
1. Luxury Lodge	yes	
2. Mid-market resort	yes	
3. Family Resort	yes	
3. Camping & Caravan park	yes	
4. Guesthouses in local village	no	
5. History museum/Cultural Centre	yes	The history, culture & wildlife interpretive centre to be combined in one facility - must be easily accessible
6. Wildlife Interpretive centre	yes	Replace with sectional title developments aimed at the mid-market investor
7. Wildlife Residential Estate	no	

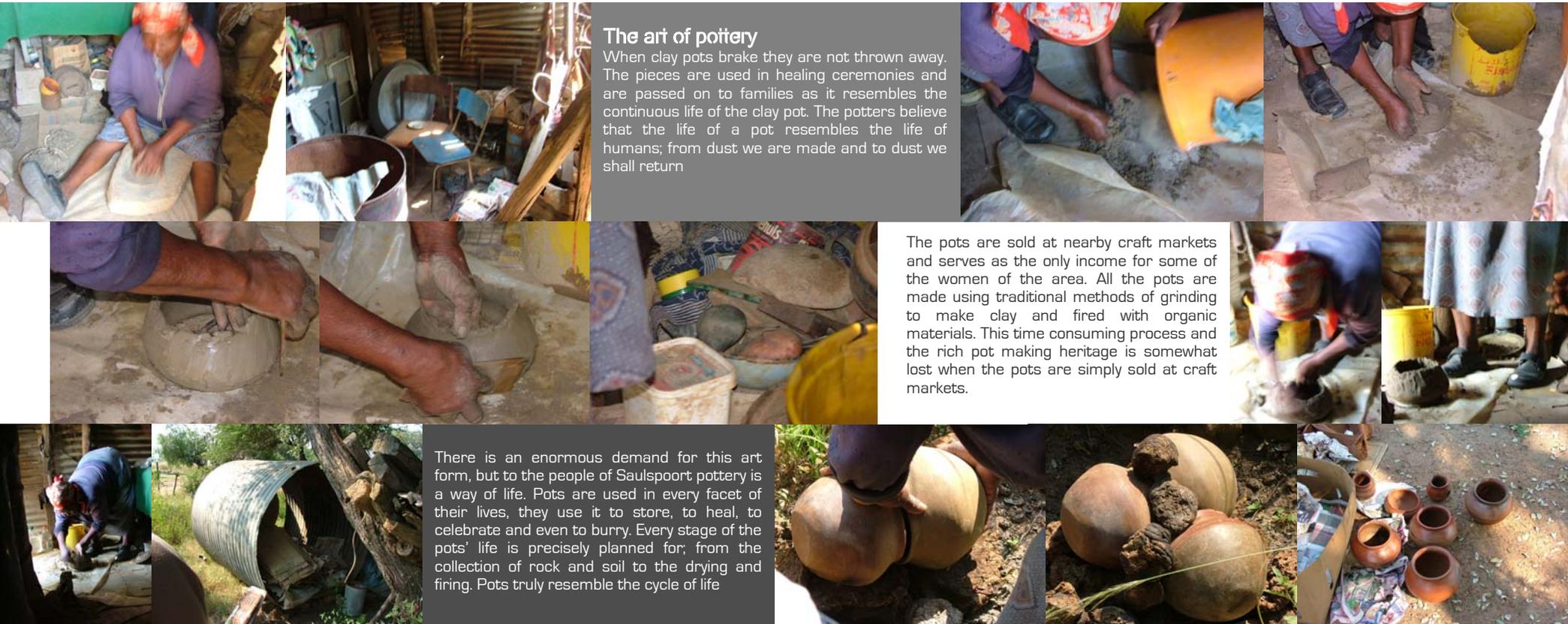


Figure C.2

8. Hunting Camp	yes	
Activities		
1. Sports, Adventure/Survivor centre	yes	
2. Game viewing by boat, river cruises	yes	
3. Eco-tourism, hiking, biking, 4x4, etc.	yes	
4. Heritage tours	yes	To combine with interpretive centre in Pilanesberg

Table C.1 Survey result of the proposed products to be included in the HP

Based on the demand assumptions the HP attracted 600 000 visitors in 2004. With an average compound growth of 2,5% per annum, the HP will be able to attract in the order of 720 000 visitors in the medium (5 to 10 years) and 850 000 visitors in the long term (15 to 20 years).

20 % of future overnight demand will be derived from overseas visitors, while 45% will be derived from domestic visitors and 35% from conference visitors. Based on the above assumptions, the market surveys and the calculated tourism carrying capacities the following products are proposed:

C. 2.3 Proposed PNP expansion products

Product	Proposed facilities
Mid-market Resort	80 lodge rooms (3/4 star - 160 beds) Conference (160 delegates) Restaurant Game drives
Mid-market Family Resort (1)	80 Lodge rooms (3-star - 160 beds); 40 self-catering units (3-star - 160 beds); Restaurants; and Conference facilities (160 delegates); Game drives & viewing by boat (sunset cruises, canoes, etc) Eco-tourism activities
Mid-market Family Resort	80 Self-catering units (3 star - 320 beds) 150 camping/caravan sites Recreation/eco-tourism facilities Restaurant & fast food outlet Self-drive wildlife viewing
Adventure Sports Centre	80 Rustic en-suite units (Stone or fixed tents - 160 beds) Adventure facilities (nature track for hiking, cycling, etc.) Conference facilities (4 separate halls accommodating 20 to 30 people each) Teambuilding facilities (high ropes, survivor game equipment, etc) Restaurant or communal catering facilities
Wildlife & Heritage Interpretive Centre	Indoor interpretation facility of +/- 1000m ² Outdoor interpretation facility of +/- 1000 m ² Restaurants & fast food outlets; Crèche; Lecturing facilities; Craft & curio selling outlets; and a small theatre for cultural demonstrations
Hunting Camp	4 en-suite units (8 beds) Communal catering facilities
Sectional Title Holiday Units	2 Phases of 40-50 units (200 beds)

Table C.2 Proposed PNP expansion products

C. 2.4 Expected Socio-Economic Benefits

The total investment in the expansion of MGR and PNP over the next ten years is estimated to amount to R569 million of which North West government has to contribute R92 million (16%), which could;

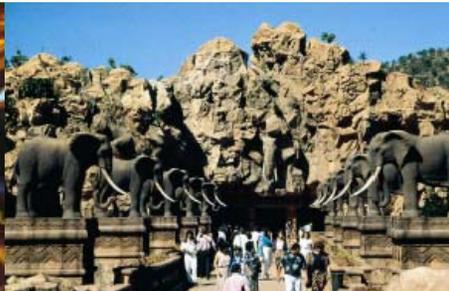
- Leverage a further investment of R477 000 000 into tourism infrastructure into the region.
- Generate more than 1500 jobs in construction related jobs.
- Create approximately 2600 (905 permanent direct and 1730 indirect) jobs in park and lodge management.
- Over the first ten years generate a wage bill for temporary jobs in excess of R123 000 000.
- Deliver within the community a direct annual wage bill in excess of R32 000 000 pa by year ten.

The unique selling features of the Heritage Park were captured as follows:

- Strongest wildlife, leisure and entertainment destination close to main markets;
- One of the most popular wildlife destinations in South Africa;
- Tourism products perform above average;
- Most successful conference wildlife destination in South Africa;
- Ability to attract a wide spectrum of the market;
- On the forefront of conservation in South Africa;
- Real investment opportunities.

The brand basis for the Heritage Park can be summarized as follows:

"...An outstanding wildlife, leisure and entertainment destination a stone's throw from the major economic centers."



Sun City resorts

The resort hotels of Sun City and the Palace of the Lost City support an economy and labour force equivalent to those of any large town. The resort is self-contained and provides lively entertainment for the whole family. The resort is 30 km from Rustenburg and frequent bus and air trips are conducted to and from Gauteng. It is also 10 km from the Pilanesberg International Airport. The Sun City resort includes the Palace of the Lost City, the Cabanas Hotel, the Cascades Hotel and the Sun City Hotel and casino. The resort offers a wide range of adventure and conference activities as well as shopping and entertainment. Sun City is also the proud host of the **Kora Music Awards** and the annual **Miss South Africa** beauty pageant.



Golf

The resort has two excellent golf courses, namely the Gary Player Golf Course and the Lost City Golf Course. The International Nedbank Two Million Dollar Golf Challenge is hosted annually at Sun City. This international golfing event draws top international players and many avid fans to Sun City during the hot month of December. Gary Player designed both the desert-style Lost City course and the Sun City course. A Putt-Putt course is also available for novices.



Outdoor activities

Other activities that offer all year round tourist interest are hiking trails, mountain biking, horse trails, game viewing, bird watching, parasailing, cultural tours, and adventure playground, 4X4 routes and hot air balloon rides.



Golden leopard Resorts

The golden leopard resorts group offers a more affordable alternative to the Pilanesberg area. There are two resorts namely the Manyane resort and the Bakgatla resort. The Bakgatla resort is situated 2 km from Saulspoort at the Bakgatla Gate into the Pilanesberg Nature reserve. Both resorts offer self catering chalets, camping and caravan facilities, bed and breakfast options, swimming pools, and game drives into the Park. The Bakgatla resort attracts a lot of tourists to Saulspoort as this is the nearest retail center.

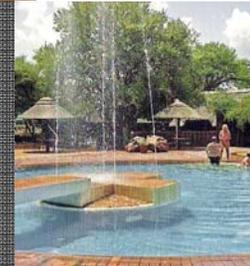


Figure C.3

C. 3 Heritage Route

The Pilanesberg area plays an important role in the development of the Heritage route. This tourism initiative is based upon the rich palaeontological, archaeological, historical and cultural resource base around the Magaliesberg Mountains and Pilanesberg in the North West Province. The Rustenburg & Eastern Districts Strategic Tourism Committee drives the initiative, which is the government leg of a proposed multi-stakeholder tourism organisation for the Rustenburg and Eastern Districts.

The route is also called the “Seat of Humankind”, as the volcanic mountains of Pilanesberg represent the head of the person, the Magalies Mountain Range provides the skeletal framework and the body is the sphere of direct influence and conservation focus [Contour Project Managers, 2001].

C. 4 Priority Area for Tourism Infrastructure Investment (PATII)

KPMG determined priority areas for infrastructure investment in South Africa. The Madikwe Area, a route from Johannesburg to Madikwe Game Reserve was selected as one of the priority areas.

Various tourism activities were found in the Pilanesberg, Sun City and Madikwe area. According to KPMG, this area has an “anchor tenant” on which tourism development could be based. KPMG also states that the establishment of Sun City was an anomalous form of development that had the effect in many instances of opening up the Pilanesberg region to both international and domestic tourists. West of Pilanesberg is the Madikwe Game Reserve situated on the Botswana border. The relative proximity of these two destinations coupled with increasing cross-border tourism, highlights the growing maturity of the tourist product in this region [DEAT, 1999].

The report states that emphasis should be placed on maximising the strengths of Sun City and growing tourism from this distribution point. There is also a requirement of maximise linkages with Botswana. Gaborone is approximately 25 km from Madikwe and is an important source of day visitors. It also has an

international airport, which could act as a feeder to North West. According to KPMG in DEAT (1999), the Madikwe area, linked to Sun City, does have the potential to grow into an adventure / ecotourism region district from the eastern Lowveld, offering district experiences. It does not possess much transport infrastructure and very little delivery infrastructure, and logical links would appear to run from Sun City as a staging post and distribution point in the short term. According to KPMG, the opportunity is to build upon the success of Hartebeespoort, use Sun City and achieve maximum benefit from infrastructure investments on the N4 and R512.

C. 5 North West Province Tourism Master Plan

Within the Tourism Master Plan a framework for tourism growth and development in the North West Province is compiled and outlines a new tourism focus for the province. According to this criteria Sun City / Pilanesberg complex is an existing tourism node that has substantial possibilities for further expansion. . The Bafokeng and Bakgatla communities in particular have already initiated a number of tourism related developments. The study indicates the importance of upgrading of the Pilanesberg Airport to accommodate direct international flights, to become an important regional gateway for international tourists.

Madikwe / Molatedi is also classified as an existing tourism node with substantial potential. It is situated in an attractive rural and wilderness landscape, but also one of the most poverty-stricken areas of the north West Province. According to the Master Plan the area has vast potential despite its isolation. The Master Plan states that Madikwe should capitalise on its location by establishing linkages with the Pilanesberg / Sun City complex, with Botswana via Gabarone Airport, with Namibia via the Trans-Kalahari route and with the overall route to Okavango Delta and Victoria Falls. An upgraded tar surfaced access road between Pilanesberg and Madikwe is necessary to bring development and access to one of the poorest regions of the North West Province.

The proposed link between the Pilanesberg / Sun City complex and the Madikwe / Molatedi tourism node, as well as possible link to Gaborone is identified as a medium density corridor and is according to the Master Plan critical for tourism development. It can open new opportunities and offer a regional overland link with Okavango Delta and Victoria Falls.

C. 6 Platinum Spatial Development Initiative (SDI)

The North West Province does not currently have a comprehensive development facilitation process aimed at promoting new tourism investment opportunities to developers and operators. The Platinum SDI aiming to attract investments along the N4 is according to the Master Plan a move in the right direction, but will not address all the potential growth nodes. The SDI route and the Gauteng / Rustenburg / Pilanesberg / Sun City corridor has a common alignment for approximately 60 km between Rustenburg and the Brits / Hartebeespoort intersection and thus, according to the Master Plan, will not form the needed link between the primary tourism markets in Gauteng and the tourism nodes within North West Province.

Conclusion

The Pilanesberg National Park and Sun City are two of the most important tourism attractions in the North West, drawing more than 500 000 local and international tourists annually. Because of the success of these initiatives, it has become evident that new tourism proposals has to be introduced to divert the internal pressures that the PNP and Sun City currently face.

An immediate strategy identified by the PNP is to phase out accommodation facilities and visitor comfort stations from the centre and to explore new opportunities on the periphery. This will stimulate the creation of new regional products and offer vital commercial opportunities for neighbouring communities and land owners.

Of all the proposed initiatives, the Heritage Park seems the most feasible, and probably the venture that will be implemented in the next five to ten years. The Park will become the catalyst in launching an important regional initiative, linking a number of other regional projects to form a significant conservation area of some one million hectares.

The realistic market demand shows that the HP area has a slight over supply of mid-to-up market accommodation and a shortage in the mid-to-budget market. Although the upper end of the market may be slightly over saturated, it has high growth potential and would still require additional products. Proposed PNP expansion products include Mid-market Family Resorts, Adventure Sport Centres, Wildlife and Heritage Interpretive Centres, Conference Facilities, Hunting Camps and Sectional Title Holiday Units.

To conclude, the Kruidfontein project including Saulspoort, as part of the proposed Heritage Park corridor, is perfectly located to accommodate any of the above mentioned tourism expansion products. The land owners are in favour of such an endeavour, provided adequate benefits to the community could be generated by the project and the cultural heritage of the Bakgatla бага Kgafela is preserved.