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Annexure 1 QUESTIONNAIRE COVER LETTER



28 February 2005

<p>A SURVEY TO DETERMINE THE JOB CREATION POTENTIAL OF SMALL TO MEDIUM SIZED TOURISM RELATED ENTERPRISES</p>	<p>OPNAME OM DIE POTENSIAAL TE BEPAAL VAN KLEIN TOT MEDIUM GROOTTE TOERISME VERWANTE ONDERNEMIGS OM WERKSKEPPINGSGELEENTHEDE TE SKEP</p>
<p>The Department of Tourism Management at the University of Pretoria is currently conducting a study with the following objectives:</p> <ul style="list-style-type: none"> • <u>To</u> determine the relationship between job creation in tourism related SMME's and increasing tourism numbers visiting the region. • <u>To</u> determine if national government's incentives to the tourism industry are contributing to job creation in small, medium and micro tourism enterprises. • <u>To</u> determine those factors deemed by small businesses as critical to sustainable job creation in the tourism industry. <p>Your business has been selected on a random basis to take part in this very important survey and, as a respected business man / woman of the Southern Cape, your valuable contribution will be greatly appreciated.</p> <p>A questionnaire is enclosed. You are requested to study this questionnaire prior to receiving a telephone call from one of our research assistants who will complete the document with yourself. The whole exercise should only take up about twenty minutes of your time. You will be contacted within a period of two weeks after receiving this letter.</p> <p>Thank you for your assistance.</p>	<p>Die Departement Toerismebeestuur by die Universiteit van Pretoria is tans bemoeid met 'n navorsingstudie wat die volgende doelwitte het:</p> <ul style="list-style-type: none"> • <u>Om</u> die verhouding tussen werkskepping in toerisme-verwante, klein tot medium, sake-ondernemings en die stygende getal besoekers wat die streek besoek te bepaal. • <u>Om</u> te bepaal of staatsaansporingsmaatreels aan die toerismebedryf enige bydrae in die streek maak tot werkskepping in hierdie ondernemings, en, • <u>Om</u> vas te stel watter faktore kleinsake belangrik ag vir die volhoubare skepping van werksgeleentehede in die toerisme bedryf. <p>U onderneming is op 'n eweredige basis gekies om deel te neem aan hierdie baie belangrike studie, en u mening as 'n gerekspekteerde sakeman / vrou sal hoog op prys gestel word.</p> <p>'n Vraelys word hiermee ingesluit en u word vriendelik versoek om dit deur te lees voordat u deur 'n lid van ons navorsingspan gekontak sal word om dit telefonies te voltooi. Die oefening behoort nie langer as twintig minute van u tyd in beslag te neem nie. U sal binne twee weke vanaf die datum van hierdie skrywer gekontak word.</p> <p>Dankie vir u deelname.</p>

RESEARCHER / NAVORSER: David Rutherford – dave.rutherford@nmmu.ac.za
Tel No: 044 – 871232 Fax No: 044 – 8742820

PROJECT LEADER / PROJEKLEIER: Prof Deon Wilson – dwilson@orion.up.ac.za

Annexure 2
RESEARCH QUESTIONNAIRE

BUSINESS SURVEY / BESIGHEIDSOPNAME

**A SURVEY TO DETERMINE THE JOB CREATION POTENTIAL OF SMALL TO MEDIUM
SIZED TOURISM RELATED ENTERPRISES**
**OPNAME OM DIE POTENSIAAL TE BEPAAL VAN KLEIN TOT MEDIUM GROOTTE TOERISME
VERWANTE ONDERNEMINGS OM WERKSKEPPINGSGELEENTHEDE TE SKEP**

Section A: General information / Algemene inligting.

1. Name of your enterprise / *naam van jou onderneming*.....
.....

2. Position of the person completing the questionnaire / *Posisie beklee deur persoon wat hierdie opname voltooi*.....

3. What is your type of enterprise ownership? / *Wat is die ondernemingsvorm van u onderneming?*

Make a cross / maak 'n kruis

Sole proprietor / <i>eenmansaak</i>	1
Partnership / <i>vennootskap</i>	2
Close corporation / <i>beslotekorporasie</i>	3
Company / <i>maatskappy</i>	4

4. Is the owner(s) engaged full or part-time in the running of the business? / *Is die eienaar (s) voltyds betrokke by die bestuur van die onderneming?*

Mark one / merk een

Full / <i>voltyds</i>	1
Part / <i>deeltyds</i>	2

5. Did you have any business experience before you started this business? / *Het u enige sake ondervinding gehad voordat u met hierdie onderneming begin het?*

Mark one / merk een

Yes / <i>Ja</i>	1
No / <i>Nee</i>	2



6. How big is your business in terms of annual turnover? / *In terme van omset, hoe groot is u onderneming?*

Make a cross / maak 'n kruis

Less than / <i>minder as</i> R150 000 per year	1
Between / <i>tussen</i> R150 000 and R25m	2
Between / <i>tussen</i> R25m and R50m	3

7. What is the size of your business in terms of employees? / *Hoe groot is u onderneming in terme van werknemers?*

Make a cross / maak 'n kruis

Less than / <i>minder as</i> 5 employees / <i>werkers</i>	1
Between / <i>tussen</i> 5 and 50 employees / <i>werkers</i>	2
Between / <i>tussen</i> 50 and 200 employees / <i>werkers</i>	3

8. What is the contribution of tourism to your total turnover? / *Wat is die bydrae van toerisme tot u totale omset?*

Make a cross / maak 'n kruis

0 – 15%	1
15 – 25%	2
25 – 50%	3
50 – 75%	4
75 – 100%	5

9. For how long has your business been in existence? / *Hoe lank bestaan u onderneming?*

Make a cross / maak 'n kruis

Older than / <i>ouer as</i> 10 years / <i>jr.</i>	1
5 – 10 years / <i>jaar</i>	2
3 – 5 years / <i>jaar</i>	3
1 – 3 years / <i>jaar</i>	4

10. Is your business independent or part of a group? / *Is u onderneming onafhanklik of vorm dit deel van 'n groep?*

Mark one / merk een

Independent / <i>onafhanklik</i>	1
Group / <i>groep</i>	2

11. What description best describes your business activity? / *Wat is die beste beskrywing van u ondernemingsaktiwiteit?*

Make a cross / maak 'n kruis

Accommodation / <i>verblyf</i>	1
Transport / <i>vervoer</i>	2
Hospitality / <i>gasvryheid</i>	3
Tour guide / <i>toergids</i>	4
Travel agent / <i>reisagent</i>	5
Tour operator / <i>toeroperateur</i>	6
Service provider / <i>diensverskaffer</i>	7
Other / <i>ander</i>	8

12. How was your business originally financed? / *Hoe is u onderneming oorspronklik befonds?*

Make a cross / maak 'n kruis

Own contribution / <i>eie bydrae</i>	1
Bank loan / <i>bank lening</i>	2
Government incentive / <i>staatsaansporing</i>	3
Loan from friend/family / <i>familielening</i>	4
Other / <i>ander</i>	5

Section B: Job creation / Werkskepping

13. Do you expect any growth in your business in the next year? / *Verwag u enige groei in u onderneming gedurende die volgende jaar?*

Mark one / merk een

Yes / <i>Ja</i>	1
No / <i>Nee</i>	2

13.1 If yes, why? / *Indien ja, hoekom?*.....

13.2 If no, why? / *Indien nee, hoekom?*.....

14. How many workers are currently employed in your business? / *Hoeveel werkers het u tans in diens?*

Time	Full-time Voltyds	Part-time Deeltyds
Currently / <i>huidig 2005</i>		

15. How many workers were employed in your business last year? / *Hoeveel werkers het u verlede jaar in diens gehad?*

Time	Full-time Voltyds	Part-time Deeltyds
2004		

16. How many workers were employed in your business during the year before last? / *Hoeveel werkers was by u in diens voorverlede jaar?*

Time	Full-time Voltyds	Part-time Deeltyds
2003		

17. How many workers will you employ in your business next year? (please give an estimate) / *Hoeveel werkers beplan u om in diens te neem volgende jaar (gee 'n benaderde syfer).*

Time	Full-time Voltyds	Part-time Deeltyds
2006		

18. Do you experience any problems in obtaining qualified staff? / *Ondervind u probleme om opgeleide personeel te bekom?*

Mark one / merk een

Yes / Ja	1
No / Nee	2

Section C: Government incentives / Staatsaansporingskemas.

19. Are you aware of government incentives that are available to your industry? / *Is u van enige staatsaansporingskemas vir u bedryf bewus?*

Mark one / merk een

Yes / Ja	1
No / Nee	2

20. If yes, what was the source of this knowledge? / *Indien ja, wat is die bron van hiedie kennis?*

Make a cross / maak 'n kruis

Auditors / Auditeur	1
Banks / Bank	2
Financial advisor / Finansiële raadgewer	3
Press / Pers	4
Other / Ander	5

21. Has your business ever made use of government incentives / subsidies? / *Het u onderneming al ooit gebruik gemaak van 'n staatsaansporing / subsidie?*

Mark one / merk een

Yes / Ja	1
No / Nee	2

22. If yes, what incentives or subsidies were made use of? / *Indien ja, watter aansporings of subsidie is gebruik?*

--

Section D: Business growth factors / OndernemingsgroEIFaktore.

23. In your opinion, are tourism developers making use of locally produced products / inputs? / *Volgens u mening, maak toerismeontwikkelaars gebruik van plaaslik vervaardigde produkte / insette?*

Mark one / merk een

Yes / <i>Ja</i>	1
No / <i>Nee</i>	2

24. To what extent does your business get help or referral business from large tourism enterprises? / *Tot hoe 'n mate ontvang u onderneming ondersteuning of verwysings van groot toerisme ondernemings?*

Make a cross / maak 'n kruis

Always / <i>Altyd</i>	1
Nearly always / <i>Amper altyd</i>	2
Sometimes / <i>Soms</i>	3
Seldom / <i>Selde</i>	4
Never / <i>Nooit</i>	5

25. Do you think that local government should play a more active role in developing tourism related small businesses? / *Is u van mening dat plaaslike regering meer betrokke moet wees by die ontwikkeling van toerisme verwante kleinsake?*

Mark one / merk een

Yes / <i>Ja</i>	1
No / <i>Nee</i>	2

26. How important is each of the following factors to ensure growth of your enterprise. / *Hoe belangrik is elk van die volgende faktore om die groei van u onderneming te verseker?*

Mark each factor with a cross / maak 'n kruis by elke faktor

Factors <i>Faktore</i>	Extremely Important <i>Uiters belangrik</i>	Very Important <i>Baie belangrik</i>	Reasonably Important <i>Weselik belangrik</i>	Some Importance <i>Minder belangrik</i>	Not Important <i>Nie belangrik</i>
Access to cheap finance. <i>Toegang tot goedkoop finansiering.</i>	1	2	3	4	5
Networking support from major players. <i>Netwerkondersteuning van hoofspelers.</i>	1	2	3	4	5
Tax breaks. <i>Belastingtoegewings.</i>	1	2	3	4	5

Question 26 continues



Factors Faktore	Extremely Important Uiters belangrik	Very Important Baie belangrik	Reasonably Important Wesenlik belangrik	Some Importance Minder belangrik	Not Important Nie belangrik
Identification by local government of opportunities. <i>Geleentheid-identifiseering deur plaaslike regering.</i>	1	2	3	4	5
Management training. <i>Bestuursopleiding.</i>	1	2	3	4	5
Employee training. <i>Werkersopleiding.</i>	1	2	3	4	5
Cooperation with other tourism businesses. <i>Samewerking met ander toerisme- ondernemings.</i>	1	2	3	4	5
Joint marketing strategies. <i>Gesamenlike bemarkingstrategie.</i>	1	2	3	4	5

27. Consider the following small to medium business developmental factors. What sphere of government should take responsibility for each of these factors (The respondent may choose more than one area of responsibility for each factor).

Bestudeer die volgende klein tot medium onderneming-ontwikkelingsfaktore. Watter vlak van regering behoort verantwoordelikheid te aanvaar vir elk van hierdie faktore? (Die respondent mag meer as een area van verantwoordelikheid vir elke faktor kies)

Make a cross (es) / maak 'n kruis (e)

Factor Faktore	Local Municipality Plaaslike Munisipaliteit	District Municipality Distriks- Munisipaliteit	Provincial Government Proninsiale Regering	National Government Nasionale Regering	Own Responsibility Eie Verantwoordelikheid
Develop tourism policy. <i>Ontwikkel toerismebeleid</i>	1	2	3	4	5
Provide tourism incentives to small businesses. <i>Voorsien kleinsake met toerisme-aansporings.</i>	1	2	3	4	5
Plan for tourism as an industry. <i>Beplanning van die toerisme-industrie.</i>	1	2	3	4	5
Provide tourism related statistics. <i>Verskaf toerisme-verwante statistiek.</i>	1	2	3	4	5
Identify opportunities for tourism related small businesses. <i>Identifiseer geleenthede vir toerisme- verwante kleinsake.</i>	1	2	3	4	5
Organise management and employee training. <i>Organiseer bestuurs en werkeropleiding.</i>	1	2	3	4	5



Factor Faktore	Local Municipality Plaaslike Munisipaliteit	District Municipality Distriks- Munisipaliteit	Provincial Government Proninsiale Regering	National Government Nasionale Regering	Own Responsibility Eie Verantwoordlikheid
Developing a joint tourism business vision. <i>Ontwikkel gesamentlike toerisme sakebeleid.</i>	1	2	3	4	5
Set up Networks and Linkages with larger enterprises. <i>Daarstelling van netwerke en koppelings met groter ondernemings.</i>	1	2	3	4	5
Provide a small business help desk. <i>Verskaf kleinsake-hulpfasiliteite.</i>	1	2	3	4	5

Please feel free to provide any further comments and /or suggestions regarding this study /
Voel vry om enige kommentaar en/of voorstelle aangaande hierdie studie te maak.

.....

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.....

**THANK YOU
FOR TAKING THE TIME TO COMPLETE THIS SURVEY.
YOUR INPUT IS MUCH APPRECIATED.**

***DANKIE VIR U DEELNAME.
U INSETTE WORD HOOG OP PRYS GESTEL.***

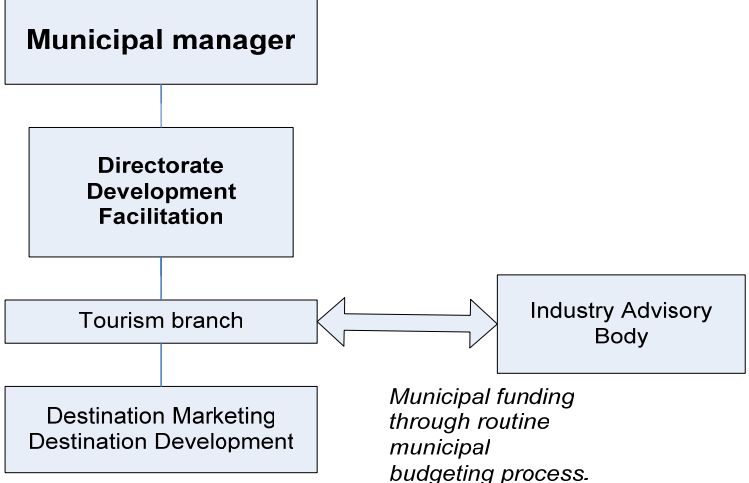


Annexure 3

SUPPORT FOR THE SOUTH AFRICAN TOURISM SECTOR

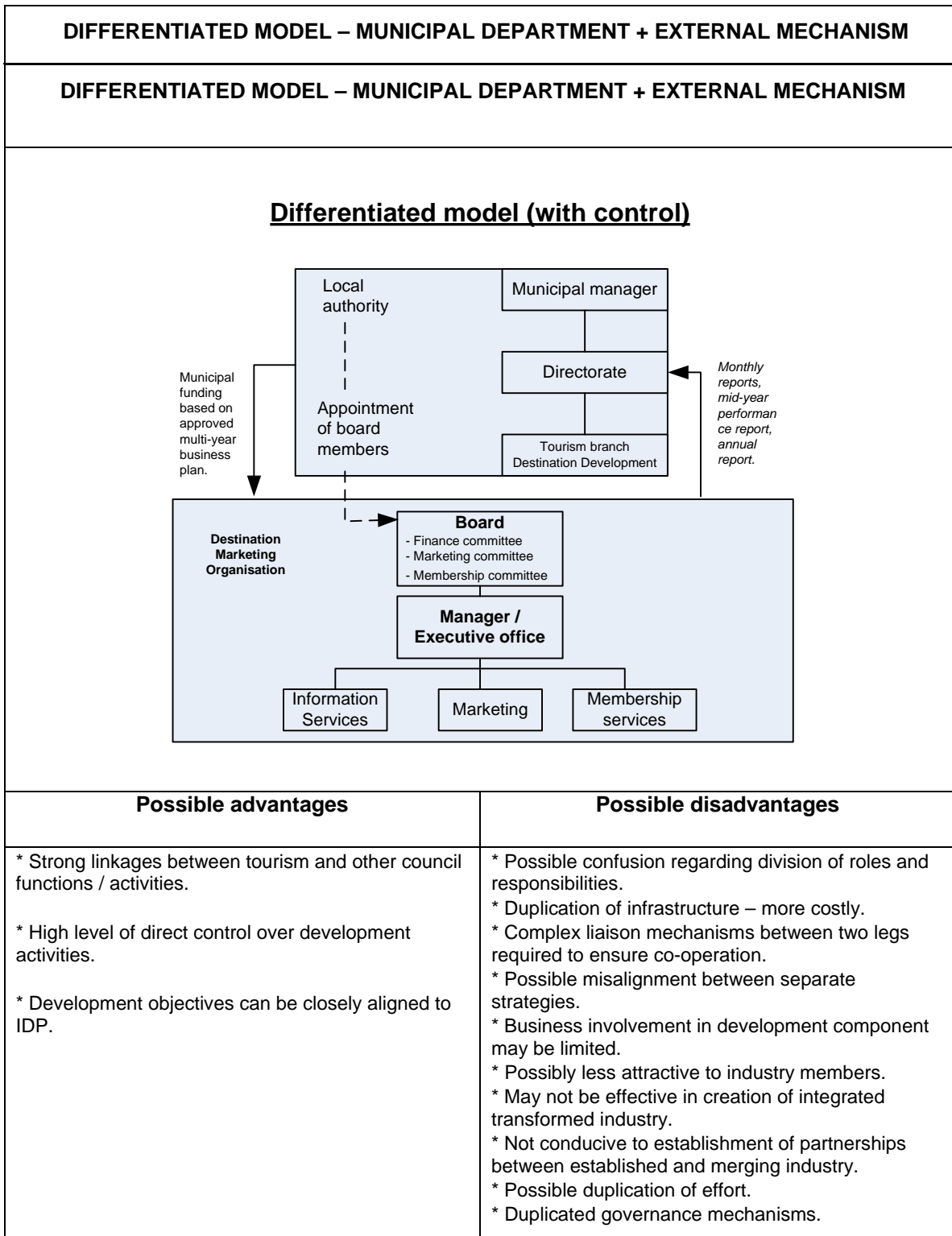
Organisation	Abbreviation	Description	Main Focus
Tourism Enterprise Programme	TEP	An initiative of the Business Trust and managed by Ebony Consulting.	Growth and expansion of large operators, investors and SMME's in the tourism sector.
Department of Trade and Industry. Small & Medium Enterprise Development Programme.	DTI SMEDP	Cash grants to tourism related projects which can show expansion of least 25% within the first year (tax free for two years). Additional 3 rd year grant based on human resource remuneration.	Accommodation, tour operators, and tourism related businesses such as private railways, cableways, and transportation vehicles on water.
Development Bank of South Africa.	DBSA	Provides support in exceptional circumstances to tourism related projects such as, attractions, services and facilities, transport, and enabling structure.	SMME support is not a core function.
Industrial Development Corporation.	IDC	Loans to businesses operating in the tourism industry such as accommodation, development in conservation, renovations, expansions, furniture, fittings and equipment.	Capital intensive businesses requiring loans greater than R1 million.
Khula Finance.	Khula	Provides guarantees to banks to act as collateral for up to 80% of bank loan. (max R1 million).	SMME's who want to borrow between R50 000 and R1 million and who are involved in the day to day running of the business.
Business Partners.		Business Partners is a viability-based investment group allocating 10% of its budget to travel and tourism related business.	Allocation targets entrepreneurial activities in guest houses, hotels, caravan-parks, restaurants, and local tour operators.
Western Cape Department of Economic Development and Tourism.		Provincial Department. Support non-monetary. Support takes the form of training, infrastructure directly linked to tourism sites, conferences, development of tourist routes, exhibitions to expose SMME's to the market, signage, feasibility studies and mentorship.	All SMME's.

Annexure 4

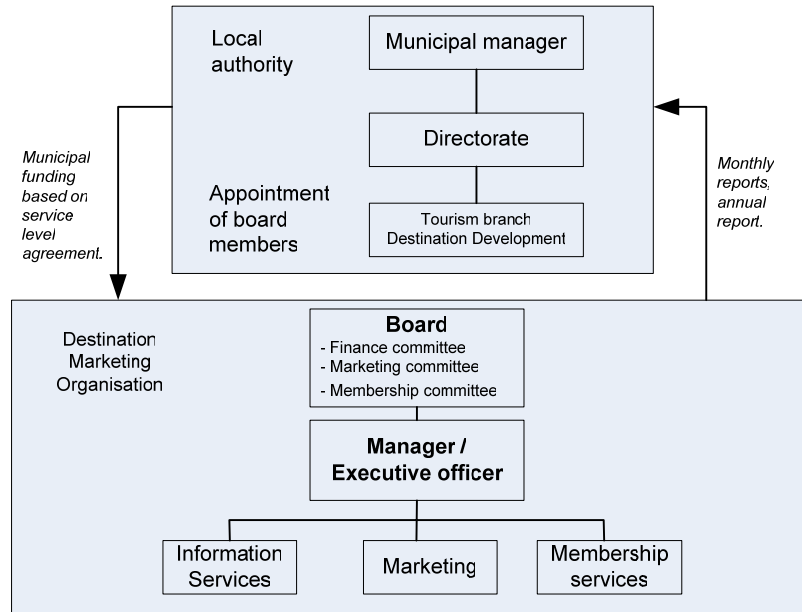
MAINSTREAM GOVERNMENT MODEL – MUNICIPAL DEPARTMENT / DIVISION	
Characteristics	
<ul style="list-style-type: none"> * Establishment. Initiated by local authority No prescribed process. * Legal status. Part of local authority. * Funding. Substantially reliant on local government funding. * Managerial Independence. Subject to local authorities policies. * Governance. Government by local authority Accountable within local authority structure. 	<ul style="list-style-type: none"> * Reporting requirements. Subject to MFMA. Annual business plan. * Public disclosure. Budget and performance indicators disclosed as part of local government disclosure. * Compliance costs. Minimal compliance costs. * Taxation. No taxation implications.
<p>Mainstream government model</p>  <pre> graph TD MM[Municipal manager] --- DDF[Directorate Development Facilitation] DDF --- TB[Tourism branch] TB --- DMD[Destination Marketing Destination Development] TB <--> IAB[Industry Advisory Body] </pre> <p><i>Municipal funding through routine municipal budgeting process.</i></p>	
Possible advantages	Possible disadvantages
<ul style="list-style-type: none"> * Use of public funds subject to normal local authority procedures. * Minimal transaction costs as no contractual arrangements made. * Not subject to company tax. * Outcomes can be related to IDP. * Strong linkages between tourism and other council functions/activities. * High level of direct control over activities. 	<ul style="list-style-type: none"> * May not be perceived as a tourism-focused entity. * May not be effective in performing role if tourism is not seen as important. * Less flexible. * Stakeholders interaction may be ineffective. * Possibly less attractive to industry members. * Ability to attract appropriately qualified staff - perceived as public sector.



Annexure 5



Differentiated model (without control)



Possible advantages	Possible disadvantages
<ul style="list-style-type: none"> * Strong linkages between tourism and other council functions / activities. * High level of direct control over development activities. * Development objectives can be closely aligned to IDP. 	<ul style="list-style-type: none"> * Possible confusion regarding division of roles and responsibilities. * Duplication of infrastructure – more costly. * Complex liaison mechanisms between two legs required to ensure co-operation. * Possible misalignment between separate strategies. * Business involvement in development component may be limited. * Possibly less attractive to industry members. * May not be effective in creation of integrated transformed industry. * Not conducive to establishment of partnerships between established and merging industry. * Possible duplication of effort. * Duplicated governance mechanisms.



Annexure 7

OUTSOURCED MODEL WITH CONTROL – MUNICIPAL ENTITY	
Characteristics	
<ul style="list-style-type: none"> * Establishment. Initiated by local authority Process prescribed. * Legal status. Independent entity with strong government linkages. * Funding. Reliance on local government funding; can source other revenues and membersupport. * Managerial Independence. Bureaucracy limited Subject to approved business plan. 	<ul style="list-style-type: none"> * Reporting requirements. Service level agreement Monthly, mid-year and annual report. * Public Disclosure. Disclosure substantially the same as local government disclosure. * Stakeholder Relationships. Can relate well. Stakeholders can nominate directors. * Compliance costs. Significant compliance costs. (separate audit) * Taxation. Subject to company taxation.
<p>Outsourced model – Municipal entity</p> <pre> graph TD LA[Local authority] -- "Municipal funding based on approved multi-year business plan." --> BO[Board appointments] BO -.-> LA BO --> MO[Manager / Executive officer] MO --> IS[Information Services] MO --> MS[Marketing Services] MO --> MMS[Membership Services] MO --> DS[Destination Services] LA -- "Monthly reports, mid-year performance report, annual report." --> BO </pre>	
Possible advantages	Possible disadvantages
<ul style="list-style-type: none"> * Independent legal status. * Ability to appoint skilled and experienced, independent directors. * Independent of local authority – more flexible. * Able to source alternative funding. * Funding from local authorities fixed on basis of contracted outputs. * Focused on its functions and delivery of contracted outputs. * Not subject to local authority procedures. * Able to develop good relationships with industry stakeholders. * More able to attract appropriately skilled staff. 	<ul style="list-style-type: none"> * Possible perceptions of loss of public control. Requires greater governance skill and effort from local authorities. * Accountability requirements more cumbersome than council department. * May not be seen as transparent in use of funding. * Linkage to IDP outcomes is indirect through a service delivery agreement. * Transaction costs greater than some other options (separate audit, business planning process). * Subject to taxation. * Municipal entity compliance and costs. * May require greater effort to ensure alignment of local authority's functions and activities with tourism.



Annexure 8

OUTSOURCED MODEL WITHOUT CONTROL – INDEPENDENT ORGANISATION			
Characteristics.			
<p>* Establishment. Initiated by members. No prescribed process.</p> <p>* Legal Status. Independent entity Subject to its constitution.</p> <p>* Funding. Reliance on local government funding.</p> <p>* Managerial Independence. Able to operate commercially without excessive bureaucracy</p> <p>* Governance. Governed by own board – service level agreement and other accountability requirements.</p>	<p>* Reporting requirements. Service level agreement, Monthly & annual report.</p> <p>* Public disclosure. No obligation to disclose. Effective disclosure through local government.</p> <p>* Relationship with stakeholders. Can relate well. Members appoint governing body. Local authority input may be limited.</p> <p>* Compliance costs. Significant compliance costs (separate audit).</p> <p>* Taxation. May be subject to company tax.</p>		
<p>Outsourced model – Independent organisation</p>			
Possible advantages		Possible disadvantages	
<ul style="list-style-type: none"> * Arms length contractual relationship with funding local authorities may suit some stakeholders. * Totally flexible in method of operating. * Likely to have a strong commercial structure. * Able to seek revenues from other commercial arrangements, including industry stakeholders. * May be more difficult to align objectives with those of municipality. * Potentially should be very efficient and effective, particularly if the service level agreement is performance based and contestable.* skilled staff . 		<ul style="list-style-type: none"> * No ownership by funding local authorities, hence limited ability to influence governance. * Perceptions of unnecessary profit to private sector from public funds. * Possible stakeholder conflict. * Possible duplication of effort and wasted resources. * Transaction costs could be high. * Some stakeholders could be isolated from providing input to direction and strategies. * Greater effort needed to ensure local TO's functions and activities are aligned with council objectives. 	

Annexure 9: Determination of Tourism Visitor Numbers

Source codes

S A Statistics	1. Various publications of monthly arrivals. (Workers and contract workers excluded)
Grant Thornton	1. Tourism Talk. 2002 Compared with 2001 and 2000. 2. Western Cape Trends card 2002. 3. Tourism Trends in the Western Cape and Garden Route - May 2001. 4. Western Cape Trends Card 2003 5. Western Cape Trends Card 2000
SA Tourism	1. Annual Tourism report 2003 by S A Tourism Strategic Research Unit, April 2004. 2. Annual Tourism report 2002 by S A Tourism Strategic Research Unit, April 2003. 3. Domestic Tourism Survey 2001 by HSRC for S A Tourism 4. Domestic Tourism Report 2003 by S A Tourism Strategic Research Unit
Wesgrow	1. Contrasting Domestic and International Tourism Market 1996 2. Western Cape Tourism Regions and routes - Fact Sheet - April 2005
Markinor	The South African Domestic Tourism Market - May 1995 - Prepared for SATOUR
Calculated	For references see Annexure 10

YEARLY SUMMARY OF INTERNATIONAL TOURISTS

Description	1994			1995			1996			1997			1998			1999		
	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden
Overseas	696303			1060766			1172394	627000		1273936			1427155			1478100	800000	
Africa	2972653			3427506			3772036	286000		3702413			4304881			4408249		
Sub-Total	3668956	0	0	4488272	0	0	4944430	913000	0	4976349	0	335000	5732036	769000	0	5886349	800000	373000

Source
Calculation
TOTAL

Ref 1. Ref 3 Ref 3 Ref 5 Ref 3

Grant Thornton
1999 figure
is 4% higher
than in 1998.

R9,7b

Direct Spend
DS Holiday
DS VFR
DS Business
DS Medical
DS Religious

YEARLY SUMMARY OF DOMESTIC TOURISTS

Description	1994			1995			1996			1997			1998			1999		
	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden
Domestic Toursm (overnight stays)	24168000	2498000					30400000	5892000	750000				39200000	4700000				
							Ref 3	Ref 1.	Ref 3				Ref 3	Ref 3				

Direct Spend (Rands)
DS Holiday
DS VFR
DS Business
DS Medical
DS Religious
Combined Business & Holiday
Excursion
Sport Event - participant
Sport event - spectator
Other

5,226m
5,219 m
0,643m
0,278 m
0,350 m
0,149 m
0,797 m

Grant Thornton
Western Research
Cape share
is 12%

Annexure 9: of Tourism Visitor Numbers (continued)



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

Source codes

S A Statistics	1. Various publications of monthly arrivals. (Workers and contract workers excluded)
Grant Thornton	1. Tourism Talk. 2002 Compared with 2001 and 2000 2. Western Cape Trends card 2002 3. Tourism Trends in the Western Cape and Garden Route - May 2001 4. Western Cape Trends Card 2003 5. Western Cape Trends Card 2000
SA Tourism	1. Annual Tourism report 2003 by S A Tourism Strategic Research Unit, April 2004 2. Annual Tourism report 2002 by S A Tourism Strategic Research Unit, April 2003 3. Domestic Tourism Survey 2001 by HSRC for S A Tourism 4. Domestic Tourism Report 2003 by S A Tourism Strategic Research Unit
Wesgrow	1. Contrasting Domestic and International Tourism Market 1996 2. Western Cape Tourism Regions and routes - Fact Sheet - April 2005
Markinor	The South African Domestic Tourism Market - May 1995 - Prepared for SATOUR
Calculated	For references see Annexure 10

YEARLY SUMMARY OF INTERNATIONAL TOURISTS

2000			2001			2002			2003			2004			Avg. % Growth per year		
SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden
1517779	770000		1498253			1803887	976000		1879110	1200000	228000	1906428	1061076		17.38	9.89	
4354475			4289117			4625696	396000		4625780	300000	57000	4817826	396904		6.21	5.54	
5872254	770000	386000	5787370	0	0	6429583	1372000	0	6504890	1528649	290443	6724254	1457980	432245	8.33	8.53	4.84
	Ref 5	Estimate					Ref. 2			Ref 1.	Ref 2		Ref 1	Ref 2			
		Ref 3					Overseas 53%			SA Tourism	Wesgrow						
							African air 21%			23.5% of total	19% of total						
							African land 8%			Ref 2							
	1% >1999					R48,8b	R9,9b		R53,9bil	R8,1bil							
						Ref 2.	Ref 2.		Ref 1.	Ref 1.							

YEARLY SUMMARY OF DOMESTIC TOURISTS

2000			2001			2002			2003			2004			Avg. % Growth per year		
SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden	SA	West Cape	Eden
32310000	4200000		34000000	4200000	793055				49300000	5200000	983388				11.55	12.02	4.45
Ref 5	Ref 5		Ref 3	Ref 3	Ref 1.				Ref 1.	Ref 1.							
			R 38.5bn	R2.71b			R2.96b		R47bn	R8,3b	Assuming						
			R6.9bn	R1.98b			Ref 2.		R21.0bn	R5.0b	Simmilar						
			R19.6bn	R0.52b					R17.5BN	R2.7b	growth as						
			R1.46bn	R0.11b	18.9% of w c visitors				R6.0bn	R0.5b	W Cape						
			R4.7bn	R0.04b					R0.6bn	R0.1b							
			R0.8bn	R0.06b					R1.9bn	R0.06b							
			Ref 3	Ref 3					Ref 1.	Ref 4.							

2003= 24%.2002

Annexure 10: Calculations of Visitor Numbers

Reference 1

YEARLY SUMMARY OF INTERNATIONAL TOURISTS 2004

SA - total

Quater1-3 4772117 South African Tourism index quaterly reports (Q1-3) - for the first 3 quarters
 Total **6724254** SA Stats - for the full year
 70.97%

Thus 71% of tourists that visited South Africa in 2004 came within the first 3 quarters

Western Cape total

Quater1-3 1035166 South African Tourism index quaterly reports (Q1-3) - for the first 3 quarters
 Total **1457980** Calculated - using the assumption that 71% of tourists visited within the first 3 quarters - see above

Western Cape - Africa and ME tourists

Quater1-3 281802 South African Tourism index quaterly reports (Q1-3) - for the first 3 quarters
 Total **396904** Calculated - using the assumption that 71% of tourists visited within the first 3 quarters - see above

Western Cape Overseas tourists

1061076 Western Cape total - Western Cape Africa and ME tourists

Reference 2

Eden total

Quater1-3 306894 South African Tourism index quaterly reports Western Cape (Q1-3) - for the first 3 quarters
 Total Knysna had the highest % tourists in Eden, only used 1 city to prevent dubble counting

	Q1	Q2	Q3	
W-Cape	447705	288653	298808	
% Knysna	36.70%	23.00%	25.50%	
Total	164308	66390	76196	306894

432245 Calculated - using the assumption that 71% of tourists visited within the first 3 quarters - see above

Annexure 11 INTERVENTION ACTIONS AT THE LOCAL LEVEL

Role players	Develop an entrepreneurial economy	Stimulate entrepreneurship	Stimulate local SMME participation in the economy	Increase local competitiveness of SMME's
Business Labour Corporate social investment (CSI)	1. Develop entrepreneurship awards 2. Encourage participation in entrepreneurship competitions.	1. Identify and promote local entrepreneurs as role models. 2. Hold competitions.	1. Relax labour law compliance for small businesses.	1. Encourage skills development among SMME's – especially during off-peak season.
NGO's	1. Develop entrepreneurship awards. 2. Encourage participation in entrepreneurship competitions.	1. Encourage participation in entrepreneurship competitions	1. Propagate the use of incubators and ESO's	1. Facilitate the establishment of linkages.
Education sector	1. Provide entrepreneurship content courses. 2. Provide skills development. 3. Train teachers/educators to teach entrepreneurship.	1. Hold competitions among students.	1. Develop incubation activity.	1. Conduct research and development.
Government	1. Appoint experienced entrepreneurs to positions within this sphere of government dealing with entrepreneurship. 2. Encourage start-ups by eliminating those factors seen as to be stumbling blocks to the creation of new enterprises. 3. Encourage participation by business and labour, CSI, NGO's and education institutions in the development of an entrepreneurial economy. 4. Involve role players and other organisations (churches, Civics, Trade unions, and business organisations) in promoting entrepreneurship. 5. Develop and stimulate entrepreneurship awards at all levels in the community.	1. Provide a help desk. 2. Provide local ESO's. 3. Provide special support for woman and PDI's. 4. Negotiate public/private partnerships.	1. Subsidise facilities 2. Supply necessary infrastructure 3. Provide low interest loans to key areas 4. Establish local networks 5. Provide incentives to reduce leakages 6. Identify local opportunities. 7. Subsidise tariffs on key inputs such as energy. 8. Foster linkages. 9. Provide land on concessionary terms. 10. Implement affirmative sub-contracting. 11. Encourage and implement outsourcing. 12. Follow an affirmative government procurement strategy. 13. Establish a data-bank of potential SMME suppliers. 14. Assist in overcoming cash flow problems of SMME's arising from their been awarded large contracts – credit guarantees to banks.	1. Develop incubation facilities. 2. Supply necessary infrastructure. 3. Reduce leakages. 4. Identify opportunities. 5. Encourage Angel Finance sources. 6. Subsidise facilities. 7. Lobby for the ability to provide financial assistance. 8. Encourage local networks. 9. Identify local opportunities. 10. Provide incentives to reduce leakages.

Annexure 12 INTERVENTION ACTIONS AT THE REGIONAL LEVEL

Role players	Develop an entrepreneurial economy	Stimulate entrepreneurship	Stimulate local SMME participation in the economy	Increase local competitiveness of SMME's
Business Labour Corporate social investment (CSI)	<ol style="list-style-type: none"> 1. Develop entrepreneurship awards 2. Encourage participation in entrepreneurship competitions 	<ol style="list-style-type: none"> 1. Identify and promote local entrepreneurs as role models. 2. Hold entrepreneurship competitions. 	<ol style="list-style-type: none"> 1. Relax labour law compliance by small businesses. 	<ol style="list-style-type: none"> 1. Encourage skills development among SMME's
NGO's	<ol style="list-style-type: none"> 1. Develop entrepreneurship awards 2. Encourage participation in entrepreneurship competitions 	<ol style="list-style-type: none"> 1. Encourage participation in entrepreneurship competitions. 2. Facilitate access to finance. 	<ol style="list-style-type: none"> 1. Encourage SMME owners to make use of incubators and ESO's. 	<ol style="list-style-type: none"> 1. Propagate the use of incubators and ESO's
Education sector	<ol style="list-style-type: none"> 1. Provide entrepreneurship content courses 2. Provide skills development. 3. Establish entrepreneurial chairs at universities. 4. Train teachers/educators to teach entrepreneurship. 5. Develop entrepreneurial spirit from low educational level upwards. 	<ol style="list-style-type: none"> 1. Hold entrepreneurship competitions among students. 2. Encourage staff to get involved with students in start-up ventures. 	<ol style="list-style-type: none"> 1. Develop incubator centres. 	<ol style="list-style-type: none"> 1. Conduct research and development
Government	<ol style="list-style-type: none"> 1. Appoint experienced entrepreneurs to positions within this sphere of government dealing with entrepreneurship. 2. Co-ordinate with tertiary institutions the supply of entrepreneurship courses and the inclusion of entrepreneurship in existing curriculum. 3. Encourage start-ups by eliminating those factors seen 	<ol style="list-style-type: none"> 1. Negotiate public/private partnerships 2. Co-ordinate all projects, interventions and activities via the IDP process 3. Adopt efficiency enhancing policies 4. Supply input related interventions such as (i) Supply business training for PDI's (ii) Provide counselling and consultancy. 	<ol style="list-style-type: none"> 1. Foster linkages. 2. Develop entrepreneurship support organisations (ESO's). 3. Provide land on concessionary terms. 4. Subsidise tariffs on key inputs such as energy. 5. Build up a statistics / information gathering unit. 6. Establish an information sharing system. 7. Facilitate the reduction of the cost of credit to entrepreneurs by shifting the 	<ol style="list-style-type: none"> 1. Form clusters. 2. Provide input related interventions such as (i) Supply business training (ii) Provide counselling (iii) Establish networks. 3. Supply necessary infrastructure. 4. Reduce leakages by providing incentives for firms to buy local. 5. Identify regional opportunities.

Role players	Develop an entrepreneurial economy	Stimulate entrepreneurship	Stimulate local SMME participation in the economy	Increase local competitiveness of SMME's
<p>Government <i>(continued)</i></p>	<p>as to be stumbling blocks to the creation of new enterprises.</p> <p>4. Encourage participation by business and labour, CSI, NGO's and education institutions in the development of an entrepreneurial economy.</p> <p>5. Involve role players and other organisations (churches, Civics, Trade unions, and business organisations) in promoting entrepreneurship.</p> <p>6. Develop and stimulate entrepreneurship awards at all levels in the community.</p> <p>7. Lobby for (i) the training of teachers and educators to teach entrepreneurship at all academic levels, (ii) the development of entrepreneurship curriculum and its integration into education.</p>	<p>(iii). Establish networks.</p> <p>5. Establish a help desk and supply information and provide entrepreneurship support (ESO).</p> <p>6. Lobby for (i) the regulation of entry and exit to the industry through licencing requirements. (ii) financial assistance through loans, grants and subsidies.</p>	<p>cost of credit to a credit guarantee system.</p> <p>8. Encourage non-bank lenders to participate in the local economy.</p> <p>9. Implement affirmative sub-contracting.</p> <p>10. Encourage and implement outsourcing.</p> <p>11. Follow an affirmative government procurement strategy.</p> <p>12. Establish a data-bank of potential SMME suppliers.</p> <p>13. Assist in overcoming cash flow problems of SMME's arising from their been awarded large contracts – credit guarantees to banks.</p> <p>14. Lobby for (i) financial assistance for woman entrepreneurs, (ii) tariff exemption on construction materials, (iii) spacial depreciation allowances, (iv) labour training subsidy as an incentive for eliminating the practice of utilising seasonal labour, (v) direct or indirect tax exemptions or reductions.</p> <p>15. Lobby for the ability to supply financial assistance.</p> <p>16. Lobby for the relaxation of labour law compliance by SMME's.</p> <p>17. Lobby for and encourage the establishment of a venture capital market.</p> <p>18. Encourage Angel Finance sources.</p>	



Annexure 13 ASSUMPTIONS ON WHICH THE STRATEGY IS BUILT

REGION-SPECIFIC ASSUMPTIONS	INDUSTRY-SPECIFIC ASSUMPTIONS	GENERAL ASSUMPTIONS
<ol style="list-style-type: none">1. The promotion of entrepreneurship is a mandatory function of local government2. The local culture toward entrepreneurship is considered3. The backlog of PDI involvement is addressed4. The concept of regionalism is followed5. Local demographics is taken into account	<ol style="list-style-type: none">1. Seasonality of the industry is taken into account2. The characteristic of leakages should be avoided3. Local government structure should facilitate both demand-side as well as supply-side strategies	<ol style="list-style-type: none">1. SME development is equated with entrepreneurship development2. The industry structure warrants government interventions3. The government has adopted the principles of SMME and entrepreneurship development as policy4. The government accepts responsibility of providing an enabling environment for SMME's to operate in (physical and social structures as well as rule of law)5. The development approach is economic in nature, supported by sustainability, community involvement and in line with IQM