

## SECTION 3. TOURISM SUPPLY

### 3.1 BACKGROUND

In order to compile a list of tourism attractions, activities, facilities and services in Buffalo City we obtained and reviewed information available at the existing tourism offices. Thereafter various secondary information sources were used including trade and consumer publications such as Getaway Magazine, travel guides and directories such as AA Travel Guides, listings by associations / institutions and boards such as the Association of South African Travel Agents, the Federated Hotel Association of South Africa, the South African Tourism Services Association, the South African Association for the Conference Industry, the Tourism, Hospitality and Sport training Authority, the Restaurant Association etc.

### 3.2 BUFFALO CITY TOURISM ATTRACTIONS, ACTIVITIES, FACILITIES AND SERVICES

For the purposes of this analysis we have defined the existing supply of tourism attractions, activities, facilities and services as:

- Attractions;
- Activities;
- Accommodation establishments;
- Eating out facilities;
- Event facilities;
- Sport facilities;
- Events; and
- Services.

In **Annexure B** we list all the attractions, activities, facilities and services that we could find in the study area. For the purposes of this report we have described and commented on the **main** tourism attractions, activities, facilities and services drawn from the detailed list in **Annexure B**.

We have also evaluated the main tourism attractions, activities, facilities and services on a scale from 1 to 10. A rating of 1 indicates that an attraction is performing poorly in regards to specific criteria, while a rating of 10 indicates that an attraction is performing well in regards to specific criteria. The rating scale and criteria are shown in **Table 3.1**.

**Table 3.1: Rating Scale for Tourism Attractions, Activities, Facilities and Services**

Criteria	1	2	3	4	5	6	7	8	9	10
Level of	Not		Partially			Fully				
Development	developed		Developed			developed				
Popularity with	Not		Tourists are			Very				
Tourists	popular		indifferent			popular				
Potential as	No		Intermediate			Much				
Tourist Attraction	potential		potential			potential				

We recognise that tourism in a specific study area does not occur in isolation and that there are various linkages with tourism attractions, activities, facilities and services in areas outside the study area. We address these linkages in **Section 3.3**.

### 3.2.1 Attractions

The attractions in the study area have been grouped in categories.

#### Beaches

Buffalo City’s primary tourist attraction is its beaches. The study area offers various main beaches that have facilities as well as several other beaches with no facilities.

Bonza Bay Beach	<p>Is situated adjacent to the Quenera River. Facilities include a Super Slide and changing facilities. Activities include walks to the Nahoon River, swimming and fishing.</p> <p>Evaluation:</p> <ul style="list-style-type: none"> <li>• The level of development is partial as no food &amp; beverage facilities exist and the existing facilities require upgrading.</li> <li>• The beach is popular with tourists as it is very</li> </ul>
-----------------	--

	<p>picturesque.</p> <ul style="list-style-type: none"> <li>• The beach has plenty of potential to be developed.</li> </ul>
Eastern Beach	<p>Situated adjacent to the Marina Glen Site and is Buffalo City’s main and most popular beach, especially during the holiday season. This beach offers changing facilities and a take-away facility.</p> <p>Evaluation:</p> <ul style="list-style-type: none"> <li>• The beach is well developed with parking, ablutions and food &amp; beverage outlets, although there are concerns about the maintenance of these facilities.</li> <li>• The beach is very popular with tourists, particularly during December when congestion becomes a problem.</li> <li>• The beach has reached its potential to attract tourists and is a well established attraction</li> </ul>
Fullers Bay	<p>Situated on the West Bank of the City offers a large tidal pool, changing facilities and a water world complex.</p> <p>Evaluation:</p> <ul style="list-style-type: none"> <li>• The beach is well developed offering various facilities.</li> <li>• The beach is relatively popular with tourists during the holiday season.</li> <li>• The beach has potential to be further developed.</li> </ul>
Gonubie Beach	<p>Situated on the Gonubie River this beach offers parking, ablutions and food &amp; beverage outlets. A boardwalk also runs along the beach.</p> <p>Evaluation:</p> <ul style="list-style-type: none"> <li>• The beach is well developed with accommodation and other facilities close by.</li> <li>• The beach is popular with tourists and local residents.</li> <li>• The beach has to a large extent realised its potential as a tourist attraction.</li> </ul>
Nahoon Beach	<p>A world-renowned beach for surfing situated on the Nahoon River. It offers changing facilities, a car park and a launch site for small boats and jet-ski’s.</p> <p>Evaluation:</p> <ul style="list-style-type: none"> <li>• The beach could be more developed with the existing car park(s) and changing facilities being in need of maintenance.</li> <li>• The beach is very popular with tourists, both international and domestic for not only its surfing, but</li> </ul>

	<p>for walking on the beach and utilising jet-ski's.</p> <ul style="list-style-type: none"> <li>The beach has great potential to be a bigger tourist attraction than it currently is as it is not utilised as much as it could be due to poorly maintained facilities.</li> </ul>
Orient Beach	<p>This beach is situated on the western end of the Esplanade (the main road running adjacent to the Beachfront). It is a safe beach with a filtered kiddies pool, an adults pool, landscaped surroundings, changing facilities, and a refreshment kiosk (open in-season only). During weekends and in season an entrance fee is charged for use of this beach.</p> <p>Evaluation:</p> <ul style="list-style-type: none"> <li>The beach is well developed with the waterpark, parking facilities and accommodation and food outlets close by.</li> <li>The beach is popular with tourists, particularly during the holiday season, but could be further utilised with the facilities it has to offer.</li> <li>Although the beach is well developed its tourism potential has not been fully realised.</li> </ul>

Beaches	Level of Development	Popularity with Tourists	Potential as Tourist Attraction	Total Score
Bonza Bay	5	8	10	23
Eastern Beach	8	8	10	26
Fullers Bay	6	6	7	19
Gonubie Beach	8	8	9	25
Nahoon Beach	6	10	10	26
Orient Beach	9	7	10	26

### Aquarium

The East London aquarium is the oldest aquarium in South Africa (built in 1931) and is situated on the Beachfront. A Seal show is offered twice daily.

The aquarium has 45 tanks at present and currently a shark pool is being built. The aquarium receives around 160 000 visitors per annum and the Whale Watching deck have been very popular.

Evaluation:

- This is a small aquarium and does not compare to aquariums in Durban or Cape Town in terms of size and variety of species on display. The level of development is rated a 5.
- The aquarium is popular with tourists during the holiday season mainly due to its location on the Esplanade. We do not believe that many tourists would frequent the aquarium if the exact same facility was located elsewhere. The popularity with tourists is rated a 4.
- The aquarium has potential as a main tourism attraction if it receives a major capital injection to place it on par with aquariums in Durban (that receives around 270 000 visitors per annum), Cape Town (that receives around 400 000 visitors per annum) and Port Elizabeth (that receives around 280 000 visitors per annum). The potential of the aquarium is rated a 6 due to the capital required to transform the existing facility.

The total score is 15.

### **Hemingway's Casino**

The new complex consists of a casino with a gaming floor with 400 slots and 12 tables, a 70-room hotel, conference facilities and entertainment facilities such as a cinema, games arcade and 5 food outlets. An outdoor climbing wall and adventure golf (putt-putt) are also provided.

Evaluation:

- The casino is well developed as a casino complex with a good mix of entertainment and food outlets. The level of development is rated an 8.
- Casino's in general are not very popular with tourists and are mainly frequented by residents of an area. Accordingly the popularity of the casino is rated a 5, not due to its facilities but due to the trend in tourism where tourists do not regularly frequent casinos at tourist destinations.
- The potential as a tourist attraction is limited due to the limited appeal to tourists. Accordingly the casino's potential as tourist attraction is rated a 5.

The total score is 18

### **Queens Park Zoo & Gardens**

The zoo is located in Beaconsfield Road and offers a variety of animals, birds and reptiles and pony rides for children. Night walks are offered twice a month. Facilities include ablutions and food outlets.

The zoo incorporates a botanical garden and its plant life within the zoo makes it unique amongst zoos. The attraction currently receives around 100 000 visitors per annum. A long-term plan is to create a hiking trail on the surrounding grounds that could be fenced to house antelope species.

Evaluation:

- The zoo is similar to the aquarium in many ways. The zoo does not compare to zoo's in for example Pretoria and Johannesburg which constantly upgrade their enclosures and displays. Accordingly we rate the level of development of the zoo as 5.
- The zoo is popular with tourists during the holiday season but is not as popular as it could be due to its, seemingly, rundown state. Accordingly we rate the popularity of the zoo as 5.
- As with the aquarium, the zoo has potential to develop into a main tourism attraction, but capital would be required to upgrade the facilities. Accordingly we rate the potential of the zoo as a tourist attraction as 5.

The total score is therefore 15.

### Museums and Historic Sites

Amathole Museum	<p>Located in King William's Town this museum contains the second largest selection of mammal species in the Southern Hemisphere. Displays include 19th century German settlers, Xhosa Gallery and Huberta (a hippopotamus that walked from KwaZulu-Natal to the Keiskamma River between 1928 to 1931).</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The museum is well developed with many displays.</li> <li>• The museum is not as popular with tourists as it could be due to the tourist's perceived view that museums lack of entertainment value.</li> <li>• The museum has potential to develop as a tourist attraction if it could be incorporated in special interest tours and other tourism products.</li> </ul>
Bisho Massacre Site	<p>Situated off Maitland Road, outside Bisho Stadium, between Bisho and King William's Town. The site of the Bisho Massacre during 1992.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The site is not developed and without a guide the site can be missed.</li> </ul>

	<ul style="list-style-type: none"> <li>• The site does not seem to be hugely popular with tourists.</li> <li>• The site has potential for development as part of a tour, but we do not believe that the site should be developed on its own.</li> </ul>
Calgary Transport Museum	<p>Located 13km from East London and includes a collection of restored horse-drawn vehicles.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The museum is well developed with various displays.</li> <li>• The museum seems to be of passing interest to tourists some of whom visit it in passing.</li> <li>• The museum has potential to attract more tourists as more tourists visit Buffalo City.</li> </ul>
East London Museum	<p>Houses the Coelacanth as well as the footprints of early man discovered at Nahoon Point. Other displays include marine history and palaeontology.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The museum is well developed with various displays but could be modernised.</li> <li>• The museum currently receives around 80 000 visitors annual, which are mainly of school groups. Thus the museum could be more popular with the general tourist but it also suffers from the tourists view point that museums lacks entertainment value.</li> <li>• The museum has good potential to be a larger tourist attraction if it could be incorporated in tourism products such as historical and cultural tours.</li> </ul>
Fort Glamorgan	<p>One of a chain of protective garrisons, built in 1848. The Powder Magazine is now a national monument.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The fort is not developed for tourism purposes with no food-outlets, public ablutions, etc.</li> <li>• The fort does not seem popular with tourists at the moment although there is no record kept of the number of visitors.</li> <li>• The fort has potential to develop as a tourist attraction if it is incorporated in other tourism products such as historical and cultural tours.</li> </ul>
Gately House	Home of East London's first mayor where family

	<p>heirlooms are preserved.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• Apart from the actual house there is no other development such a food outlets.</li> <li>• Although no record is kept of visitor numbers the house seems not to be popular with tourists. Visitors occasionally include the house with their visit to the zoo.</li> <li>• As with Fort Glamorgan the house has the potential to grow as a tourism attraction if included in other tourism products.</li> </ul>
<p>German Settler's Memorial</p>	<p>Commemorates the 1858/9 arrival of more than 2000 German men, woman and children to expand the settlement.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• Apart from the memorial there is no other development as food outlets, accommodation, etc are available close by.</li> <li>• There is no way of telling whether the attraction is popular with tourists as many tourists pass the attraction on the Esplanade, but it is unclear whether they notice it or stop at it.</li> <li>• If included in other tourism products, the memorial has potential to grow as tourism attraction.</li> </ul>
<p>Hood Point Lighthouse</p>	<p>A lighthouse located on the West Bank of East London, built in 1895.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The lighthouse has no other facilities apart from the actual lighthouse building.</li> <li>• The lighthouse is not of interest to the mass tourism market but some special interest groups would find it of interest.</li> <li>• The lighthouse has potential for special interest tourists that will visit it as part of a tourism product such a marine history tour.</li> </ul>
<p>Lock Street Gaol</p>	<p>South Africa's first woman's gaol which housed Winnie Madikizela-Mandela and Daisy de Melker. It is now a small shopping centre with a variety of home industries outlets.</p>

	<p>Evaluation</p> <ul style="list-style-type: none"> <li>• The attraction is well developed as a small shopping centre and houses various shops.</li> <li>• The gaol is popular with tourists who frequent the shops but don't always realise the historical value of the building.</li> <li>• The attractions has to a large extent realised its potential as a tourist attraction through the utilisation of its shops. The attraction could be further developed by making tourists aware of the historical significance of the building.</li> </ul>
St Peter's Church	<p>The oldest church in East London, built in 1857.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The church is not developed but an operating church does not require additional facilities.</li> <li>• The church seems to be of limited interest to special interest tourists.</li> <li>• The church has potential to grow as a tourist attraction if included with other tourism products</li> </ul>
Steve Biko Garden of Remembrance	<p>Located in King William's Town this garden houses the grave of the political activist Steve Biko and victims of the Bisho Massacre.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The garden is not well developed at present has no food outlet and ablutions. Plans are underway to develop the site.</li> <li>• The garden seems to receive limited visits from tourists at present.</li> <li>• The garden has the potential to become a main tourism attraction with its rich political history. The garden could serve as the main attraction in tourism products such as cultural and history tours.</li> </ul>

Museums and Historical Sites	Level of Development	Popularity with Tourists	Potential as Tourist Attraction	Total Score
Amathole Museum	8	6	8	24
Bisho Massacre Site	1	4	8	13
Calgary Transport Museum	6	5	6	17
East London Museum	7	5	8	20

Fort Glamorgan	2	3	8	13
Gately House	2	3	8	13
German Settler's Memorial	2	3	7	12
Hood Point Lighthouse	1	3	6	10
Lock Street Gaol	8	8	8	24
St Peter's Church	1	3	8	12
Steve Biko Garden of Remembrance	2	3	10	15

### Art & Crafts

The arts & crafts markets all have similar evaluations so we have described the attractions separately but have evaluated them jointly.

African Culture	General store selling ceramics, sculpture, drawing and painting, batik and tie dying and graphics.
Ann Bryant Art Gallery	Located in St Marks Road off Upper Oxford Street, the gallery contains varied collections. The gallery has examples of late Victorian architecture and was built in 1905. It is also a venue for cabaret performances.
Art Studio	Situated near the Aquarium Centre, The Esplanade, Quingney. Selection of top South African artists including landscapes, seascapes, wildlife, African art and local art.
Visit Africa Curio Shop	Located in Lock Street Goal this shop offers leather, wood and other curios for sale.
Zanzele Craft Market	A permanent craft market located at Hemingways Casino offering traditional arts & crafts.

### Evaluation

- The art & craft markets are well developed with shops and markets being located at main tourism attractions or shopping centres. The level of development is thus rated as 8.
- Arts & crafts markets are popular with tourists as an additional attraction to main attractions. These arts & craft markets would be missed if they were not there. The popularity with tourists is rated a 7.
- The potential of these arts & crafts markets as main tourist attractions is limited as tourists view them as add-ons to existing tourism attractions. However, these markets do contribute to the overall tourism product and their potential as tourist attractions is thus rated as 7.

Overall the arts & crafts facilities score 22.

### Cultural Attractions

<p>Emzini Traditional Food Restaurant &amp; Jazz Cafe</p>	<p>A restaurant situated at Hemingway’s Casino that serves traditional Xhosa meals.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The restaurant is well developed and offers a high standard of service.</li> <li>• The restaurant seems popular with tourists and residents alike.</li> <li>• The restaurant has the potential to become a tourist attraction if incorporated with other tourism products.</li> </ul>
<p>Khayalabantu Cultural Village</p>	<p>A cultural village near Mooiplaas, 30 kilometres outside East London. The experience offers Xhosa dancing and Xhosa food while a guide can tell visitors about Xhosa culture.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The attraction is well developed with various activities provided.</li> <li>• The attractions seems to be moderately popular with tourists</li> <li>• The attractions has potential to be developed as a larger tourist attraction if incorporated with other tourism products.</li> </ul>

Cultural Attractions	Level of Development	Popularity with Tourists	Potential as Tourist Attraction	Total Score
Emzini Traditional Food Restaurant & Jazz Cafe	8	8	9	25
Khayalabantu Cultural Village	8	5	7	20

### Nature Reserves

The nature reserves under public sector control are:

<p>Gonubie Nature Reserve</p>	<p>Situated in the suburb of Gonubie this 8 hectare reserve is ideal for bird-watching and offers a wide variety of indigenous plant species. Ablutions and bird hides are</p>
-------------------------------	--

	<p>provided.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The reserve is as developed is it should be for such a small reserve. We do not believe that more facilities are required at the reserve.</li> <li>• The reserve is popular with bird watchers and local residents who like to walk the paths.</li> <li>• The reserve is small and will not be a main tourist attraction, but it complements other bird watching sites well and has potential to be marketed as a bigger bird watching tourism product.</li> </ul>
Nahoon River Estuary	<p>This estuary is a popular recreation and fishing spot and offers a variety of wildlife, sterlizias, cycads and Mangrove trees. The facilities provided are similar to those of Nahoon beach.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The reserve could be more developed in terms of paths layout and interpretation of fauna and flora.</li> <li>• The reserve is popular with local residents but less so with tourists.</li> <li>• The reserve has the potential to be incorporated in a larger tourism product such as hiking trails, nature based tourism, etc.</li> </ul>
Umtiza Nature Reserve	<p>This 758 hectare reserve is situated on Buffalo Pass and offers various tree species, Samango monkeys and three hiking trails.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The reserve does offer well-marked hiking trails but has not been developed further.</li> <li>• The reserve is not popular with tourists as there are concerns regarding safety.</li> <li>• The reserve has some potential to be developed as part of other tourism products but is too small to serve as a main attraction.</li> </ul>

The nature reserves under private control include:

Mpongo Private Game Reserve	The 1 224ha reserve is located on the N6 to Stutterheim and offers giraffes, hippos, zebras and a variety of buck. The
-----------------------------	--

	<p>reserve is currently being renovated with the lodge and restaurant being upgraded.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The reserve is privately owned and well developed offering picnic sites, a restaurant and a lodge.</li> <li>• The reserve is popular with local residents and following its renovation could be marketed more to tourists.</li> <li>• The reserve has the potential to become a main tourists attraction if marketed properly by its new owners.</li> </ul>			
Nature Reserves	Level of Development	Popularity with Tourists	Potential as Tourist Attraction	Total Score
Gonubie Nature Reserve	8	7	8	23
Nahoon River Estuary	4	5	8	17
Umtiza Nature Reserve	2	2	5	9
Mpongo Private Game Reserve	8	7	8	23

### Other Attractions

Other attractions in Buffalo City include a variety of activities and attractions. We highlight rock art and theatres separately as we believe that these attractions have potential to develop into larger attractions. The rest of the attractions are evaluated jointly

#### Rock Art

Various sites exist in Buffalo City such as the “Grotto Museum” on the farm of Mr V. Briggs on Kei Road. Mr Briggs offers day hikes which include around 80 rock art sites in the Cathcart and Stutterheim districts.

#### Evaluation

- At present the rock art sites are very under developed with no brochures being available on the subject and existing sites having limited access. We rated the level of development of rock art attractions as 2.
- The rock art attractions receive limited visits from tourist at present, as they are not well developed. We believe that these attractions could be more popular with special interest groups and rate the popularity with tourists at 6.
- The rock art sites have a lot of potential as a tourist attractions, particularly if they can be incorporated in tourism products such as history and cultural tours. We rate the potential at 8.

The overall score is 16.

#### Theatres

Buffalo City houses 6 theatres where various plays and productions are offered. The most well known and utilised are the Guild Theatre, the Arts Theatre and The Playhouse.

#### Evaluation

- The theatres, although old, are well developed and established. Various types of events are hosted in order to keep operating. We rate the development at 7.
- Theatres can be popular with tourists if a specific place has become known for world-class productions (for example Broadway) but in general the local residents support theatres. Accordingly we rate the popularity with tourists as 4.
- The potential of theatres as tourist attractions in their own right is limited as much larger productions than are currently offered would have to be staged. However, theatres could be incorporated in tourism products such as cultural tours. We rate the potential as a tourist attraction at 5.

Overall the theatres score is 16.

#### Other attractions

Glendale Trekking Centre	Tour guides offer horse trails along the beaches of the East Coast in the area from Glen Eden to Cefane.
Mini Steam Train Trips	Takes place every first Sunday of the month at the Gonubie Farmers Hall.
Ten Pin Bowling	Located in Commercial Road this Ten pin bowling alley offers 10 lanes, pool tables and a bar.
Thornvalley Python Park	Located on the N6 this touch farm offers pony rides, kids 4-wheelers, a python display, crocodiles and ostriches.
Tilty Hill Touch Farm	Located in Horseshoe Valley this touch farm offers a tea garden, picnic sites, pony rides and farm animals.
Water World & Fun Park	Located on the West Bank. Features super tube, speed slides, river cascades, paddling pools, play park, kids mini 4x4.

#### Evaluation

- These other attractions are private sector initiatives and are well developed. We rate their level of development at 7.

- These attractions are popular with tourists, particularly during the holiday season, when family entertainment is required. We rate their popularity with tourists at 7.
- None of these other attractions have the potential to develop into main tourists attractions, but they do offer additional activities and attractions that add to the overall tourism product. We rate their potential as tourist attractions as 5.

The total score is 19.

### 3.2.2 Activities

Our review of activities in Buffalo City has shown that few activities are listed in the marketing material. We did find listings for horse riding, lazer games, microlight flights, mountain biking, mountain climbing, paint ball, sand boarding, scuba diving and yachting. We believe that much potential exist for activities in Buffalo City being offered on a more formal basis.

One activity that was better developed is hiking and it is evaluated below.

#### Hiking Trails

<p>Strandloper Hiking Trail</p>	<p>A five-day, 55 kilometre, hiking trail that follows the coast from Kei Mouth to Gonubie. This trail is nationally well known and well utilised as it offers plenty of scenic beauty.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• The trail is well developed and established with overnight facilities as required.</li> <li>• The trail is popular with tourists and it is well utilised.</li> <li>• The trail has realised its tourism potential being a main tourist attraction.</li> </ul>
<p>Tilty Hill Trail</p>	<p>Situated on the Tilty Hill Farm, the trails include an 8 kilometre or 4 kilometre hike along the Nahoon River. Scenery includes banana plantations, the river, forest and a variety of birds, butterflies and wild flowers.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>• This trail is well developed with supporting facilities from the farm such as food outlet, ablutions, etc.</li> <li>• The trail seems popular with visitors to the farm but seems not to be widely known or utilised.</li> </ul>

	<ul style="list-style-type: none"> <li>The trail has limited potential to develop further as a tourist attraction but can contribute as part of a larger tourism product such as hiking trail holidays.</li> </ul>
Hidden Cave Trail	<p>Situated in Beacon Bay this short trail include interesting old trees and a small cave.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>The trail is not developed and lacks basic facilities.</li> <li>The trail seems under utilised at present.</li> <li>The trail has potential to develop as part of a larger tourism product.</li> </ul>
Umtiza Nature Reserve Trails	<p>Three trails of 1,5 km, 2,5 km and 7 km respectively are available in this nature reserve. Security on these trails is a concern for hikers.</p> <p>Evaluation</p> <ul style="list-style-type: none"> <li>The reserve does offer well-marked hiking trails but has not been developed further.</li> <li>The reserve is not popular with tourists as there are concerns regarding safety.</li> <li>The reserve has some potential to be developed as part of other tourism products but is too small to serve as a main attraction.</li> </ul>

Hiking Trails	Level of Development	Popularity with Tourists	Potential as Tourist Attraction	Total Score
Strandloper Hiking Trail	8	8	9	25
Tilty Hill Trail	8	5	6	19
Hidden Cave Trail	2	3	7	12
Umtiza Nature Reserve	2	2	5	9

### 3.2.3 Accommodation Establishments

Buffalo City has a number of accommodation establishments offering different types of accommodation. Our primary research has identified 192 establishments in the study area that offer 2 731 units which include rooms, chalets, rondavels, dormitories and caravan and campsites. A breakdown of these establishments is shown in **Table 3.2**.

**Table 3.2. Accommodation Establishments in Buffalo City**

Accommodation Type	Number of Establishments	Number of Units	Average Annual Unit Occupancy for 2002
--------------------	--------------------------	-----------------	--

Backpackers	9	73	60%
Game & Nature Reserves (with accommodation)	1	8	N/ A
Guesthouses and Bed & Breakfast	117	664	64%
Hotels	21	1 094	58%
Resorts/ Caravan Parks	11	288	60%
Self-catering	28	522	75%
<b>Total</b>	<b>187</b>	<b>2 649</b>	<b>N/ A</b>

During our primary research we obtained information regarding the markets that frequent the accommodation establishments in Buffalo City. We will utilise that data in **Phase 4** of this assignment; **Tourism Markets** and do not detail it in this phase, which relates to tourism supply.

We do provide detail on the supply of accommodation establishments in Buffalo City and comment on their average annual occupancy for 2002 as an indication of usage.

In regards to our evaluation of accommodation establishments we believe that accommodation establishments very rarely become tourist attractions in themselves but the availability of these establishments adds to the potential of Buffalo City as a tourist attraction. Accordingly, we have rated the potential of accommodation establishments to add to the attractiveness of Buffalo City as a tourist destination rather than the potential of these establishments to be attractions in themselves.

### **Backpackers**

4 Of the backpacker establishments in Buffalo City are located close to the main beachfront i.e. Orient beach and Eastern Beach. The backpacker establishments provide accommodation mainly in dormitories with some providing rooms that can sleep 2 to 4 people. Additional facilities include kitchens and ablutions.

The backpacker establishments achieved an average annual occupancy rate of 60% in 2002.

### **Evaluation**

- The backpacker establishments in Buffalo City are of a good standard providing basic yet clean facilities. We rate their level of development at 7.
- These establishments are particularly popular with foreign tourists who utilise the cheaper accommodation to spend more time in Buffalo City and to utilise more tourism attractions and activities. We rate the popularity with tourists at 8.
- Backpacker establishments accommodate mostly foreign tourists and should this accommodation not be available it would be to the detriment of Buffalo City. Based in this we rate the potential of backpacker establishments as a tourist attraction at 8.

### **Game & Nature Reserves with Accommodation**

The only game and nature reserve in Buffalo City with accommodation that our primary research could identify is Mpongo Private Game Reserve. The reserve and lodge are currently being renovated and will be officially opened on 15 May 2003. The reserve offers a lodge which is of a good standard. As the reserve and lodge are being renovated no occupancy figures were available.

#### **Evaluation**

- The lodge on the reserve is well developed and is being renovated. We rate the level of development at 7.
- The reserve is popular with local residents and following its renovation could be marketing more to tourists. We rate the potential popularity with tourists at 7
- The reserve and lodge has the potential to become a main tourists attraction if marketed properly by its new owners. We rate the potential of the lodge at 8.

### **Guesthouse and Bed & Breakfast Establishments**

The guesthouse and bed & breakfast establishments are spread throughout Buffalo City and range from establishments offering 1 or 2 bedrooms to establishments with as many as 33 rooms. Most of the establishments are on a 1-star to 2-star level with around 10 establishments being on a 4-star to 5-star level.

Most of the establishments that market themselves are doing well i.e. achieving average annual occupancies in excess of 60% or more per annum. There are a small portion of establishments that offer accommodation as an after thought i.e.

a person may have a spare room in their house and rent it out on an ad hoc basis. These establishments achieve low occupancies. As it is not their main source of income and they do not market the facility but they are still listed as a bed & breakfast.

#### Evaluation

- The guesthouse and Bed & Breakfast market is well developed in Buffalo City with establishments of various grading spread throughout the study area. We rate the development of the establishments at 8.
- Guesthouses and Bed & Breakfast establishments are popular with business, conference and holiday tourists and based on the occupancy figures we believe these establishments are well frequented. We rate the popularity with tourists at 8.
- Guesthouses and Bed & Breakfast establishment fill a need of a specific market segment in Buffalo City and should they not be available, it will deter tourists to the area. We rate the potential as tourist attractions at 7.

#### Hotels

Buffalo City has 21 accommodation establishments listed as hotels. These establishments provide around 1 100 rooms in the study area.

Not all of the hotels are graded according to the new SA Tourism grading criteria but based on our primary research we believe that the majority of these hotels are on a 2-star level. There are 5 hotels on a 3-star level and 1 hotel on a 4-star level. Buffalo City does not have any 5-star hotels.

The hotels seem to be fairly well frequented, achieving an average annual occupancy of 58% in 2002. The occupancy of hotels in Buffalo City is on par with the average annual occupancy for all hotels in South Africa, which was 59% in 2002 according to Statistics South Africa.

#### Evaluation

- Buffalo City has a number of hotels in the 2-star to 3-star range, but no 5-star hotel. The existing hotels are also starting to look dated which might deter business travellers. We rate the development of hotels in Buffalo City at 6.
- Hotels are popular with business and conference tourist and to a lesser extent holiday visitors. We rate the popularity of hotels at 6.

- Hotel accommodation is important in any city destination and as such we rate the potential of hotels to add to Buffalo City as tourist destination at 8.

### **Resorts/ Caravan Parks**

Our primary research shows that there are 11 resorts/caravan parks in the Buffalo City municipal area and that they provide 288 units including chalets, rondavels and caravan and camping sites. These units achieved an average annual occupancy rate of 60% in 2002.

The establishments offer a range of facilities, mainly aimed at the domestic, family-holiday market with swimming pools, small convenience shops, a games room, paddling boats (if located on a river), etc.

The resorts/ caravan parks are all of a good 1-star to 2-star standard. None of the establishments were upmarket or exclusive resorts/ caravan parks.

### **Evaluation**

- The resorts/ caravan parks in Buffalo City are relatively developed but still on a good 1-star to 2-star standard. Some of these establishments could be renovated and upgraded. We rate the level of development at 6.
- Resorts/ caravan parks are popular with families on holiday and cater well to this market segment. As such we rate the popularity of resorts/ caravan parks at 7.
- Resorts/ caravan parks caters to one of the main market segment of tourists to Buffalo City, namely the family, holiday market and as such is important to develop the potential of Buffalo City. We rate this potential at 8.

### **Self-catering**

The self-catering establishments in Buffalo City range from 2 chalets on a property to resorts (that do not include caravan and camping sites) to holiday apartment blocks. In total the 28 establishments provide 522 units in Buffalo City.

The majority of the establishments are at a 1-star to 2-star level and provide basic self-catering facilities such as one to three rooms, a lounge, bathroom(s) and a kitchen. Most establishments provide cutlery and linen and are serviced at least daily or every second day.

The self-catering establishments surveyed are well frequented, achieving an average annual occupancy of 75% in 2002. Although the establishment surveyed said that they receive visitors throughout the year (holiday visitors during the holiday period and business visitors during the rest of the year) the occupancy figures are higher than we would have expected.

Evaluation

- The self-catering market is relatively well developed in Buffalo City. The establishments are on a 1-star to 2-star level and are spread throughout the area. There may be opportunities for more upmarket self-catering establishments. We rate the level of development at 6.
- The self-catering establishment surveyed were well frequented by tourists, achieving high occupancies. We rate the popularity with tourists at 8.
- As self-catering establishments cater to one of the main markets in Buffalo City, namely the family, holiday market, these establishments add greatly to the potential of Buffalo City as a tourist destination. We rate the potential at 8.

**3.2.4 Eating Out Facilities**

Buffalo City has a variety of eating out facilities including coffee shops, take-away facilities, pubs and restaurants (see **Annexure B**). **Table 3.3** shows the breakdown of eating out facilities in Buffalo City.

**Table 3.3. Eating Out Facilities in Buffalo City**

Type	Number of Establishments
Coffee Shop	11
Fast Food Franchise Outlets	29
Ice Cream Parlour Outlets	5
Restaurants	36
Taverns	13

The study area has various outlets of major restaurant and take-away chains such as Spur, the Dros, Nando’s, Kentucky Fried Chicken, Debonairs, The Keg, O’Hagans and Wimpy.

Our survey of accommodation establishments showed that there are restaurants within all of the hotels and that these restaurants are primarily used by hotel guests and day conference delegates.

There are also a large number of independent restaurants in the East London area, spread over the various suburbs offering a variety of cuisine. Eating-out seems to be popular entertainment with the local residents and most outlets are well supported.

It is evident in this market that many new establishments open, become popular for the first few months, and then lose clientele. It seems that the local market loses interest very quickly in the local eating-out and entertainment facilities and then moves on to another new facility. It is, therefore, very difficult to build up a lasting trade in this area, which is very important in respect of these type of facilities.

#### Evaluation

- Eating out facilities are well represented through Buffalo City offering a variety of cuisine. We rate the development of eating out facilities at 9.
- Eating out facilities are popular with local residents but Buffalo City does not seem to be known for its restaurants amongst tourists. We rate the popularity with tourists at 6.
- Eating out facilities are vital to any tourism destination but we do not believe that the existing restaurant add or detract from the attractiveness of Buffalo City as a tourist destination. We rate the potential of restaurants to add to the attractiveness of Buffalo City at 5.

Overall the eating out facilities score is 20.

### 3.2.5 Event Facilities

Our primary research identified 86 facilities that can host events such as conferences, workshops, cocktail parties, launch events, etc. Many of these facilities are small offering one room that can accommodate 5 to 15 people.

The largest venue in Buffalo City is the River Park Convention Centre that has 14 330 square meters of floor space of which around 6 000 square meters are regularly rented out. Some listings state that the facility can accommodate 10 000 people but when we surveyed the facility we were told that it can accommodate

4 000 people and that they did not like to utilise it for more than 2 500 people as there were safety concerns regarding fire escapes (the facility is located in the 4<sup>th</sup> floor of the old BKB Building). The facility has been operating for around 2 years and hosts a wide variety of events including conferences, motor exhibitions and boxing matches.

Other main event facilities include the Regent Hotel that can accommodate 1 400 people cinema style in 4 connectable rooms. It also has 6 breakaway rooms with seating for 100 delegates each.

Two event facilities in Buffalo City can accommodate a maximum of 400 people namely The Protea Hotel King David and the Osner Hotel. Other notable event facilities include East London City Hall that can accommodate 250 people and Balugha Inn that has a hall that can accommodate 250 people.

The event facilities in Buffalo City are at a 1-star to 3-star level, but many of the facilities in the older hotels require refurbishment.

It is difficult to precisely gauge the utilisation of event facilities, as they do not keep adequate records of their utilisation. Our primary research did show that events in Buffalo City tend to last 1 or 2 days, with plenty of one-day workshops or meetings. The event facilities surveyed said that utilisation levels of their facilities are from busy to very busy.

#### Evaluation

- The event facilities in Buffalo City are not as well developed as they could be. Most of the facilities are small with few facilities that can host events for more than 300 people. Some existing facilities are also in need of refurbishment. We rate the level of development at 5.
- Event facilities are popular with their intended market i.e. conference delegates and businesses. However, it seems that most of the events are one day events resulting in limited sale of bednights. Due to this lack of multi-day events we rate the popularity of event facilities at 5.
- Events such as conferences are an increasing market segment in South Africa if judged by the building of international convention centres. We believe that venue facilities can greatly increase the attractiveness of Buffalo City as a tourist destination and rate it at 9.

Overall the event facilities score is 19.

### 3.2.6 Sport Facilities

Buffalo City has a large number of sporting facilities and clubs and the general population are fairly active sport participants.

Buffalo City has sporting facilities that can host international sporting events and these sport facilities include:

- The Jan Smuts Athletics Stadium;
- Buffalo Park Cricket Ground;
- East London Golf Course;
- Xerox Park Astro Turf Hockey Field;
- Mercedes Benz Grand Prix Motor Racing Circuit;
- Absa Stadium (Rugby and Soccer);
- The Buffalo City Ocean (Surfing, Power Boating, Yachting, etc).

Other prominent sporting facilities in Buffalo City are:

- East London Indoor Sport Arena;
- Sisa Dukashe Stadium;
- Joan Harrison Swimming Pool Complex; and
- Selborne Tennis Courts.

Although Buffalo City is the home ground of all Border teams, sporting events are not well attended. Both the Border Cricket Board and the Border Rugby Unions indicate that home games generally attract very limited number of spectators. The stadiums are only full if international matches are played in East London. However, soccer matches do attract good spectator numbers.

#### Evaluation

- The sporting facilities in Buffalo City are well developed with at least 7 facilities able to host international events. We rate the development of sport facilities at 8.
- The sporting facilities seems to lack from utilisation by residents but the potential exist to be utilised by tourists when sporting events are hosted. We rate the popularity of sporting facilities with tourists at 8.
- The utilisation of sporting facilities could tap a growing market segment in South Africa and add to the attractiveness of Buffalo City as a tourist destination. We rate the potential at 9.

Overall the sports facilities score is 25.

**Table 3.4** provides an indication of the types and number of clubs in the study area. Some of these facilities or clubs provide more than one activity, for example, rugby and cricket or soccer and running.

**Table 3.4: Main Sports Facilities & Clubs in East London**

Club	Number of Clubs offering the Sport
Angling	3
Archery	1
Athletics	3
Aviation	2
Basketball	1
Bowls	4
Cricket	2
Cycling	4
Golf	5
Hiking	2
Hockey	2
Horse Riding	1
Jukskei	1
Martial Arts	9
Motor sports	5
Netball	1
Rock Climbing	1
Rowing	1
Rugby	1
Scuba Diving	3
Shooting	2
Soccer	1
Squash	1
Tennis	2
Volleyball	1
Yachting	2

### 3.2.7 Events

There are various events being held in Buffalo City during the course of the year and Buffalo City Tourism publishes an events calendar. We have not listed each and every event in **Annexure B** but highlight the main events held each year in the study area. These events are:

- The Buffalo Regatta held in February each year;
- The Surfers Marathon – a 18 kilometre beach and road run held in February;
- Daily Dispatch Rotary Buffalo Cycle Tour – a cycle event offering 3 routes and distances, held in March/ April;
- The East London Agricultural Show – a farmers market and show held in April;

- The Portnet Harbour Festival – a festival that includes various stalls, musical shows, display sports, boat races, etc held in April;
- The Gonubie Festival – a large market with various stalls held in May/ June;
- The Washie 100 – a road Race from Port Alfred to East London held in July;
- The Spring Festival – a festival with various events held in conjunction with the Daily Dispatch Fun Run held in September;
- The Oktoberfest – a beer festival organised by the German Club of East London and held in October;
- Opening of Season and switching on of the Christmas lights, held in December; and
- The Beach Buzz Festival – a section of the beachfront is cordoned off to accommodate various stalls and entertainment includes water sports, plays, musical shows, etc. The festival is held in December.

#### Evaluation

- Events held in Buffalo City seem to be varied and based on attractions and activities in the area. However, none of the events held in Buffalo City has broad national support, such as the Cape Argus Cycle Race, The Comrades Marathon, etc. We rate the development of events at 6.
- Events are popular with local residents but a limited number of tourists currently travel to Buffalo City to attend events. We rate the popularity of events with tourists at 5.
- Events can play a major role in attracting tourists to a destination as the Cape Argus Cycle Race, the Comrades Marathon and other events demonstrate. We rate the potential of events to improve the attractiveness of Buffalo City at 9.

Overall the event score is 20.

### 3.2.8 Services

Tourism does not operate in a vacuum and various support services are required. **Table 3.5** shows the tourism support services in Buffalo City.

**Table 3.5: Tourism Support Services in Buffalo City**

Service	Number of Establishments/ Outlets
Air Charter	2
Banks	19
Booking Agent	2

---

Car Rental	17
Chamber of Commerce	1
Clinic or Hospital	12
Sea Rescue	1
Tour Operator	18
Travel Agents	10

---

Both air charter companies operate from East London Airport and offer aeroplanes and helicopters flights.

All the main banks in South Africa are represented in Buffalo City with various outlets around the study area. Similarly, the main car rental agents are well represented in Buffalo City and operate mainly from East London Airport.

Hospitals and clinics represent both public and private controlled facilities and are of a good standard.

Tour operators based in Buffalo City offer a wide range of tourism products. An analysis of the tourism products promoted shows that tourism products in areas close to Buffalo City are promoted, for example hiking trails in the Wild Coast.

The travel agents in the study area are mainly franchises or branches of travel agents such as Rennies, Harvey World Travel, Sure Travel, etc.

#### Evaluation

- The tourism support services in Buffalo City are well developed and well spread throughout the study area. We rate the level of development of tourism support services at 8.
- Tourism support services as such are neither popular nor unpopular with tourists. These services are contributing factors to a pleasant tourism experience and although not noticed by many tourists, they are indeed noticed if absent. We rate the popularity of tourism support services with tourists at 8.
- The same argument as above relates to tourism support services' contribution to the attractiveness of Buffalo City as a tourist destination. Although a tourist may not need a hospital when in Buffalo City, that tourist would certainly miss it if he needed it and it was not available. We rate the potential of tourism support services to increase the attractiveness of Buffalo City as a tourist destination at 9.

Overall the services score is 25.

### **3.3 LINKAGES WITH OTHER TOURISM AREAS**

Tourism in Buffalo City does not occur in isolation and tourism products are not limited by municipal boundaries. To take this into account we list a number of tourism areas with which tourism in Buffalo City is linked.

#### **3.3.1 Great Kei Municipal Area**

The Great Kei Municipal Area borders Buffalo City to the northeast and stretches to the Kei River. The area includes the town of Cintsa which includes various guesthouses and bed & breakfast establishments and is on the East Coast Jikeleza tourism route. Inkwenkwezi Private Game Reserve is also located in this area and offers rhino, warthog, giraffe, buffalo and various antelope species.

#### **3.3.2 Amahlati Municipal Area**

Amahlati Municipal Area borders Buffalo City to the north and includes the towns of Stutterheim and Cathcart. The Friendly N6 tourism route runs through this municipal area and attractions in the area include the 8 500 hectare Tsolwana Nature Reserve which includes white rhino, Cape mountain zebra, giraffe, kudu and other buck species.

#### **3.3.3 Nkonkobe Municipal Area**

The Nkonkobe Municipal Area borders Buffalo City to the west and includes the towns of Hogsback and Katberg. The area is part of the Amatole Mountain Escape tourism route and offers the scenic Amatole Mountains that are utilised for hiking, mountain biking and trout fishing. The area includes the 7 500 hectare Mpofu Game Reserve which houses Eland, Wildebeest, Giraffe, Kudu, Zebra, Cape Buffalo and other buck species.

The town of Hogsback is a popular tourism destination for Buffalo City residents and offers various accommodation establishments.

### 3.3.4 Ngqushwa Municipal Area

The Ngqushwa Municipal Area borders Buffalo City to the southwest and stretches to the Great Fish River. Attractions in the area include the Fish River Sun Resort and Mpekweni Marine Resort.

### 3.3.5 The Wild Coast

The Wild Coast is situated to the north of Buffalo City and offers various coastal resorts at destinations such as Cintsa, Haga Haga, Morgan Bay, Kei Mouth, Mazeppa Bay, Hole in the Wall, Coffee Bay and Port St Johns. Popular hiking trails in the area include the Wild Coast Amble and the Wild Coast Meander. Game reserves in this area include Dwesa and Cwebe Nature Reserves, Hluleka Nature Reserve and Mkambati Nature Reserve.

## 3.4 FUTURE PLANNED SUPPLY OF TOURISM ATTRACTIONS, ACTIVITIES, FACILITIES AND SERVICES

Our primary research did not identify any new tourism attractions, activities, facilities or services planned for the study area. However, there are planned changes to existing facilities in the greater Buffalo City area that we need to highlight.

The Eastern Cape Development Corporation (“**ECDC**”) has called for tenders to redevelop or acquire the 3-star Mpekweni Marine Resort. In the past the resort was managed by Sun International along with the Fish River Sun and the ECDC has now called for tenders to expand the attraction and retain/bring tourists into the area. The tender process closed on 30 April 2003.

The Eastern Cape Tourism Board (“**ECTB**”) has called for tenders to develop tourism facilities in the Mkambati Nature Reserve, Silaka Nature Reserve, Double Drift Game Reserve (Great Fish River Complex) and Double Mouth Caravan Park (East London Coast). Registration to tender closed on 1 April 2003.

In both cases the injection of private sector capital in existing tourism attractions is expected to lead to the expansion of tourism attractions in the wider Buffalo City area.

### 3.5 POTENTIAL TOURISM ATTRACTIONS, ACTIVITIES, FACILITIES AND SERVICES

In order to identify the potential tourism attractions, activities, facilities and services in Buffalo City we held a workshop with East London Museum (historical, heritage and cultural experts) and Ithemba Environmental (environmental experts). The existing tourism base was analysed and possible new tourism attractions, activities, facilities and services were identified.

This list is by no means exhaustive and during **Phase 7: Tourism Development Plan** we will identify various tourism investment projects that will take into account the feasibility of identified tourism projects.

East London Golf Course	Currently rated as one of the top golf courses in South Africa this course could be linked with the Fish River Sun golf course in a golf holiday. The golf course could further upgraded to an even better standard and develop could include: <ul style="list-style-type: none"> <li>• Golf shop;</li> <li>• Caddies.</li> </ul>
Events	Various events could be held in Buffalo City but the main events that could attract tourists to the area that we identified are: <ul style="list-style-type: none"> <li>• A cycling race;</li> <li>• A surfers marathon;</li> <li>• A swimming gala.</li> </ul>
Forts	Forts like Fort Galmorgan and Fort Jackson could developed as tourist attractions in order to will link into a tourism product such as a historical tour. Development that could take place include: <ul style="list-style-type: none"> <li>• Food out let;</li> <li>• Ablutions;</li> <li>• Interpretive signage;</li> <li>• Tour guides.</li> </ul>
Fossil Footprint	The site where the Fossil Footprint was found near Nahoon

	<p>Point could be developed as part of palaeontology tours. Development could include:</p> <ul style="list-style-type: none"> <li>• Food out let;</li> <li>• Ablutions;</li> <li>• Interpretive signage;</li> <li>• Tour guides.</li> </ul>
Mdantsane Township	<p>The Mdantsane Township could be developed as a cultural attraction. Existing accommodation establishments and restaurants could be incorporated in a township tour. Development could include:</p> <ul style="list-style-type: none"> <li>• Accommodation;</li> <li>• Restaurants;</li> <li>• Tour guiding.</li> </ul>
Rock Art Museum	<p>Mr V. Biggs currently has a rock art museum on his property and organise tours to rock art sites. This museum could be developed into an attraction. The development could include:</p> <ul style="list-style-type: none"> <li>• A rock art museum;</li> <li>• Food out let;</li> <li>• Ablutions;</li> <li>• Tour guides.</li> </ul>
Steve Biko Garden of Remembrance	<p>The Remembrance garden currently does not have basic facilities and it has the potential to be developed into a main cultural and historical attraction. Development could include:</p> <ul style="list-style-type: none"> <li>• A interpretive centre;</li> <li>• Food out let;</li> <li>• Ablutions;</li> <li>• Tour guides.</li> </ul>
The Marina Glen Site	<p>This site situated at Eastern Beach requires development as its state of neglect is detracting from other attractions in the area. Previous proposals for development included:</p> <ul style="list-style-type: none"> <li>• Multi-purpose event facility;</li> <li>• A 100-room accommodation establishment;</li> <li>• Restaurants;</li> <li>• Limited retail facilities.</li> </ul>
Umtiza Nature Reserve	<p>This small nature reserve has the potential to be developed as a bird watching site. Development could include:</p> <ul style="list-style-type: none"> <li>• Interpretive signage;</li> </ul>

	<ul style="list-style-type: none"> <li>• Tour guides.</li> </ul>
--	--

### 3.6 BUFFALO CITY TOURISM PRODUCTS

**Figure 3.1** provides a definition of a tourism product for the purposes of this study. This definition is derived from international research, and is based on what the tourist buys.

**Figure 3.1: Tourism Product Definition**



As mentioned in the tourism product definition, tourism products are composites of the attractions and other services and facilities available in an area. The tourism products and their related sub-products that we have identified in the study area are:

- Sun, sea and sand holidays;
- Adventure holidays;
  - Hiking trails;
  - Surfing;
- Nature based holidays;

- Events;
- Sport; and
- Conferences.

The tourism products identified are existing and relatively well developed. They are the reasons why the majority of tourists visit Buffalo City at present. In **Section 3.6** we identify the potential tourism products that could be developed in Buffalo City.

**Table 3.6** shows the tourism attractions, activities, facilities and services that the identified tourism products are comprised of. **Table 3.6** does not mean that anybody on, for example, a sun, sea and sand holiday will not visit, for example, the museum. **Table 3.6** only means that the **main** reason for a tourist on a sun, sea and sand holiday to Buffalo City is the beaches.

Also, tourism support services such as banks, travel agents, etc are important to a tourist but they are not the main reason why a tourist will chose a tourism product.

Based on our analysis in **Table 3.6** the tourism product with the most tourism attractions, activities, facilities and services that serves as reasons to visit are sun, sea and sand holidays, hiking trails, nature based holidays, events and conferences.

The tourism attractions, activities, facilities and services that mostly serve as the main reason for visit are the accommodation establishments and the beaches.

**Table 3.6: Existing Tourism Products and the related Tourism Attractions, Activities, Facilities and Services**

Tourism Attractions, Activities, Facilities and Services	Tourism Product							Total
	Sun, Sea & Sand Holiday	Hiking Trails	Surfing	Nature Based Holiday	Events	Sport	Conferences	
Beaches	☺	☺	☺	☺				4
Aquarium								0
Casino								0
Zoo								0
Museums								0
Historical Sites								0
Arts & Crafts								0
Nature Reserves	☺	☺		☺				3
Cultural Attractions								0
Event Facilities					☺		☺	2
Sport Facilities						☺		1
Events					☺		☺	2
Backpackers	☺	☺	☺	☺	☺	☺	☺	7
Guesthouse and B&B	☺	☺	☺	☺	☺	☺	☺	7
Hotels	☺	☺	☺	☺	☺	☺	☺	7
Resorts/ Caravan Parks	☺	☺	☺	☺	☺	☺	☺	7
Self-catering	☺	☺	☺	☺	☺	☺	☺	7
Eating Out Facilities	☺	☺	☺	☺	☺	☺	☺	7
<b>Total</b>	<b>8</b>	<b>8</b>	<b>7</b>	<b>8</b>	<b>8</b>	<b>7</b>	<b>8</b>	

### 3.7 POTENTIAL TOURISM PRODUCTS

Following the identification of existing tourism products and the existing tourism attractions, activities, facilities and services we identify the potential tourism products in the study area.

As mentioned above, tourism products are composites of the attractions, activities, facilities and services in an area and we did not identify specific attractions, facilities or activities to develop.

In order to identify the potential tourism products in Buffalo City we held a workshop with East London Museum (historical, heritage and cultural experts) and Ithemba Environmental (environmental experts). The potential tourism products identified are:

- Palaeontology tours – Developed around the history of early man in Southern Africa with the footprints of early man found near Nahoon Point as the main attraction. The tours could include a visit to the museum and Nahoon Point;
- Historical tours – Developed around various historical sites in the study area. The type of historical tours that could be developed include:
  - Pre-colonial history up to 1830;
  - Missions;
  - Places of worship;
  - Military history tours;
  - Xhosa history and traditions - 19th and 20th centuries;
  - Apartheid Struggle history;
  - German Settlers;
  - Maritime history and shipwrecks;
- Whale watching – Developed around the little known fact that Buffalo City offers very good whale watching opportunities during May to September. Guides could take tourists to whale watching spots and include tours of the existing beaches;
- Hunting – Developed mainly in the hinterland of Buffalo City, which currently already offers this tourism product. Hunting of mainly antelope species in a malaria free area could be marketed;
- Fly fishing holidays – Developed around the various rivers in and around Buffalo City;

- Bird watching – The Buffalo City area has between 400 to 500 bird species in areas such as Gonubie Nature Reserve and Nahoon River Estuary;
- Golf holidays – East London Golf course has recently been voted as South Africa’s 5<sup>th</sup> best golf course and combining this golf course with the 4 other in Buffalo City as well as golf courses at the Fish River Sun could provide an ideal golf holiday;
- Adventure holidays – Development of new and expansion of existing adventure activities and attractions including Micro lighting, Mountain biking, etc.

As with the existing tourism products we analysed the potential tourism products according to the tourism attractions, activities, facilities and services that they are composed off (see **Table 3.7**).

Based on our analysis in **Table 3.7** the potential tourism product with the most tourism attractions, activities, facilities and services that serves as reasons to visit are Palaeontology Tours, Historical Tours, Whale Watching and Adventure Holidays.

The tourism attractions, activities, facilities and services that mostly serves as the main reason for visit are the accommodation establishments and the nature reserves.

**Table 3.7: Potential Tourism Products and the related Tourism Attractions, Activities, Facilities and Services**

Tourism Attractions, Activities, Facilities and Services	Tourism Product							Total	
	Palaeontology Tours	Historical Tours	Whale Watching	Hunting	Fly Fishing Holidays	Bird Watching	Golf Holidays		Adventure Holidays
Beaches	☺		☺					☺	3
Aquarium			☺						1
Casino									
Zoo	☺								1
Museums	☺	☺							2
Historical Sites		☺							1
Arts & Crafts									
Nature Reserves	☺			☺	☺	☺		☺	5
Cultural Attractions									
Event Facilities									
Sport Facilities							☺		1
Events									
Backpackers	☺	☺	☺	☺	☺	☺	☺	☺	8
Guesthouse and B&B	☺	☺	☺	☺	☺	☺	☺	☺	8
Hotels	☺	☺	☺	☺	☺	☺	☺	☺	8
Resorts/ Caravan Parks	☺	☺	☺	☺	☺	☺	☺	☺	8
Self-catering	☺	☺	☺	☺	☺	☺	☺	☺	8
Eating Out Facilities	☺	☺	☺	☺	☺	☺	☺	☺	8
<b>Total</b>	<b>10</b>	<b>8</b>	<b>8</b>	<b>7</b>	<b>7</b>	<b>7</b>	<b>7</b>	<b>8</b>	

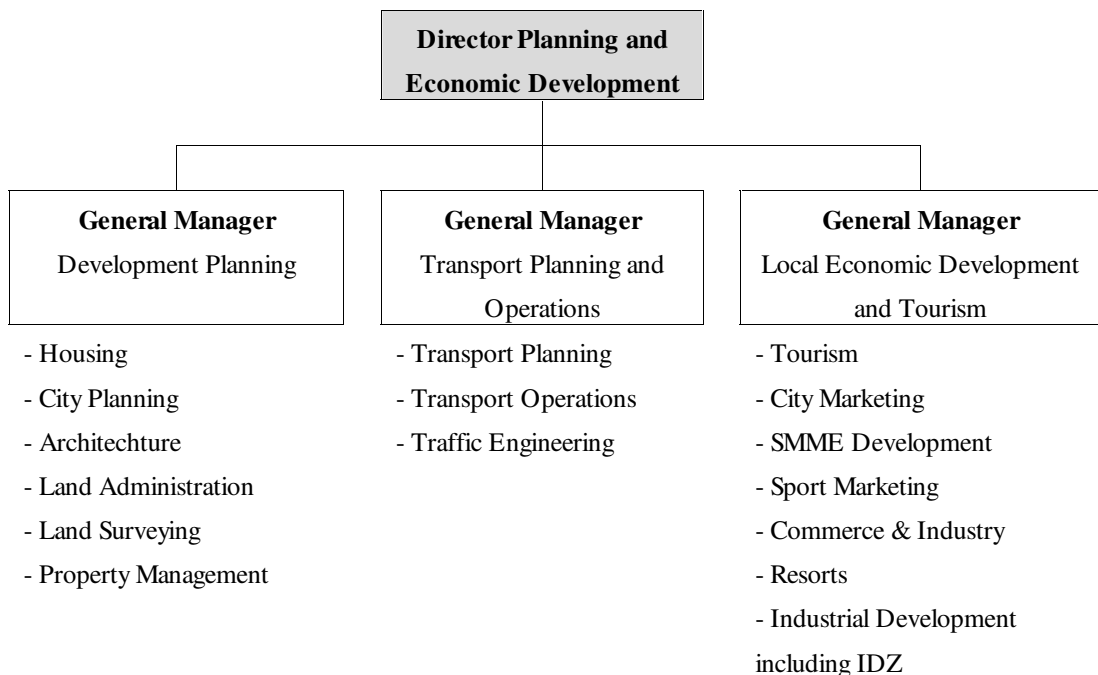
### 3.8 CURRENT INSTITUTIONAL FRAMEWORK

The current institution framework within which tourism in Buffalo City occur will be covered in detail in **Phase 11** of our assignment; **Institutional Framework**. Below we detail our preliminary analysis of the current institutional framework. The following documentation was reviewed:

- Buffalo City IDP;
- Buffalo City Quality of Life/ Needs Assessment Survey (November 2001);
- King William’s Town Tourism (September 2000);
- Regional Setting King William’s Town (August 2000);
- King William’s Town Conservation of the Cultural Heritage (September 2000).

#### 3.8.1 Buffalo City Municipality

The Buffalo City IDP recommends that tourism be incorporated in the Directorate of Planning and Economic Development of the Buffalo City Municipality. The proposed structure is as follows:



The Buffalo City IDP also recommends the development of a Tourism Development Plan as a strategy flowing from the IDP. Specific tourism related projects and proposals recommended in the IDP are:

- Hiking trails in the Amatola Forest;
- Water recreation on the Rooikrans Dam, the Bridle Drift Dam, the Nahoon Dam and the Laing Dam;
- An arts & craft market in King William's Town;
- Township tours in Mdantsane;
- A tourism facility on the Marina Glen Site;
- Revitalisation of the central beachfront;
- An Amalinda showground sports facility;
- Duncan Village township tours; and
- Coastal conservation areas and nature reserves.

### 3.8.2 Buffalo City Tourism

Buffalo City Tourism is a Section 21 company that receives funding from Buffalo City Municipality, memberships and sponsorships. The entity is governed by a board with 13 members comprising:

- 3 Councillors from Buffalo City Municipality;
- 8 Representatives from the tourism industry including:
  - A representative from the hotel industry;
  - A representative from game reserves;
  - A representative from bed & breakfast establishments;
  - A representative from tour operators;
  - A representative from the restaurant industry;
- 1 Representative from the Eastern Cape Tourism Board; and
- The Managing Director of Buffalo City Tourism.

Buffalo City Tourism currently has two information offices in the study area namely and office on the main beachfront in East London as well as an office in the library in King Williams Town.

One of the existing librarians staffs the information office in King Williams Town and the East London office has 8 staff members in total.

### 3.9 INTERVIEWS CONDUCTED

During the course of our primary research for Phase 3 we were required to conduct interviews with various stakeholders to obtain their opinion and input in respect of:

- The strengths, weaknesses, opportunities and threats for the Buffalo City tourism industry;
- Future development needs and plans for the tourism industry;
- Tourism policies;
- Tourism marketing strategies and actions; and
- Public and private sector functions and interaction.

Some of the information obtained during these interviews will be utilised in later phases of the report, for example the occupancies obtained from accommodation establishments will be used during Phase 6 when the carrying capacity will be estimated. For the purposes of this report, we summarise the views of the various stakeholders interviewed as it relates to this report.

The information obtained regarding tourism policies, tourism marketing strategies and actions and public and private sector functions and interaction have been incorporated in **Section 3.8. The Current Institutional Framework.**

A list of the stakeholders that have been interviewed is provided in **Section 1.3.**

#### 3.9.1 Views on Buffalo City

One of the most common words used when describing Buffalo City was “potential”. The majority of interviewees felt that the area has great natural assets (such as the beaches) that can be developed to make Buffalo City a leading tourist destination. The strengths of the area was seen as its natural assets such as the beaches, fauna & flora and rivers.

The weakness mostly mentioned when describing Buffalo City was the perception of the area. Most people thought the area had little to offer in terms of tourist attractions and the East London CBD was seen as run down. Stakeholders that knew the area were optimistic about what the area had to offer tourists, but felt that the area was not marketed properly.

There was also a perceived lack of activities in the area and this seems to be perpetuated by Buffalo City residents. Many interviewees commented that local residents were the first to criticise their city.

There were various criticisms regarding the lack of maintenance of infrastructure with the city. The deterioration of roads was named as one of the problems. Accommodation establishments in particular complained about a lack of signage, not only to their own establishments, but to tourism attractions.

A few interviewees raised the issue of the lack of a five-star hotel in Buffalo City. The feeling was that a five-star hotel would raise the profile of Buffalo City and would be able to attract more upmarket tourists to the area.

The current limited air access was seen as hampering tourism development and various interviewees suggested that charters be investigated. Some interviewees felt that the higher cost to fly to East London was inhibiting the change in existing tourism routes. Many tour operators currently take tourists from Cape Town, via the Garden Route to Port Elizabeth and then fly them to another destination. Some interviewees felt that this tourism route could only be extended to East London if the price of air access could be addressed.

Most interviewees felt that the development of the N2 Toll road between Buffalo City and the KwaZulu-Natal south coast would have a very positive impact on tourism. The feeling was that the road would change the current perception that it is unsafe to travel through the Wild Coast area.

### **3.9.2 Development Needs**

A few interviewees indicated that Buffalo City lacks a “must see” attraction i.e. something that the area is uniquely known for. However, none of the interviewees could offer suggestions as to what this must see attraction could be.

The majority of interviewees felt that Buffalo City requires more marketing. Suggestions made include that Buffalo City should first consolidate its existing tourism markets before exploring new target markets. Marketing should also occur at source, with for example, the Free State market being targeted in Bloemfontein. Market segments that should be pursued includes foreign

backpackers and independent travellers, adventure tourists, sports tourists and domestic tourists from the Free State, Gauteng and Western Cape.

A few interviewees did suggest that the marketing efforts be concentrated on tour operators and wholesalers in order to be most effective.

A number of interviewees indicated that adventure activities should be developed in the Buffalo City area. Activities such as hiking trails, mountain biking, fishing and canoeing were suggested. The interviewees indicated that these activities are being offered on an ad hoc basis and is not always available out of season. One interviewees suggested that SMME's be empowered to offer these activities and then supported during the out of season times until such time as demand increase.

Many interviewees felt that Buffalo City to market itself as a sports destination. Events for both children and retired people could be offered with the existing sport facilities. However, some sport facilities do need to be upgraded and maintained. Golf was mentioned as a particular sport that could be developed.

Specific development that was raised during the interviews are:

- A seaside resort offering a range of activities with luxury accommodation;
- Backpacker facilities close to the surfer beaches;
- A multi-purpose event facility where conferences as well as indoor sporting events could be held.

One interviewee suggested that hubs be created in the East London CBD to address revitalisation of certain areas. These hubs could include a hub for restaurants, one for antique dealers and one for arts & crafts. The idea is to create a hip, artistic centre in order to revitalise the CBD.

### 3.10 CONCLUSION

Our analysis of tourism attractions, activities, facilities and services can be summarised in **Table 3.8**. The table indicates the rating of the existing tourism attractions, activities, facilities and services.

The evaluation shows that eating out facilities are the most developed with a score of 9, followed, on a joint score of 8, by sport facilities, services, guesthouse and B&B, cultural attractions, the casino and arts & crafts. The least developed are rock art and museum & historical sites.

The most popular with tourists, on a joint score of 8, are sport facilities, services, self-catering, guesthouse & B&B, beaches and backpackers. The least popular, on a joint score of 4, are theatres, museum & historical sites and the aquarium.

The attractions, activity, facility or service that has the most potential for development are the beaches with a score of 10, followed on a joint score of 9, by sport facilities, services, events and event facilities. Other Attractions, activities, facilities and services that received a high score are self-catering, rock art, resort/ caravan parks, museum & historical sites, hotels, cultural attractions and backpackers.

Tourism attractions, activities, facilities and services that rate high on development, popularity and potential could be viewed as strengths of Buffalo City. These include sport facilities, services and beaches.

Tourism attractions, activities, facilities and services that rate low on development, but high on popularity and potential could be viewed as opportunities for Buffalo City. These include museums and historical sites and event facilities.

**Table 3.8: Evaluation of Tourism Attractions, Activities, Facilities and Services in Buffalo City**

Most Developed Attractions		Most Popular with Tourists		Most potential as Tourist Attractions	
9	Eating out facilities	8	Sport Facilities Services Self-catering Guesthouse & B&B Beaches Backpackers	10	Beaches
8	Sport Facilities Services Guesthouse & B&B Cultural Attractions Casino Arts & Crafts	7	Resorts/ Caravan Park Arts & Crafts	9	Sport Facilities Services Events Event Facilities
7	Theatres Beaches Backpackers	6	Rock Art Nature Reserves Hotels Eating out facilities Cultural Attractions	8	Self-catering Rock Art Resorts/ Caravan Park Museum & Historical Sites Hotels Cultural Attractions Backpackers
6	Self-catering Resorts/ Caravan Park Nature Reserves Hotels Events	5	Zoo Hiking Trails Events Event Facilities Casino	7	Nature Reserves Hiking Trails Guesthouse & B&B Arts & Crafts
5	Zoo Hiking Trails Event Facilities Aquarium	4	Theatres Museum & Historical Sites Aquarium	6	Aquarium
3	Museum & Historical Sites			5	Zoo Theatres Eating out facilities Casino
2	Rock Art				