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Cultural world heritage site scan: Lessons from four sites

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List of acronyms

AWHF	African World Heritage Fund
DBSA	Development Bank of Southern Africa
HMA	heritage management authority
ITB	International Tourism Bourse
JICA	Japan International Cooperation Agency
JMC	joint management committee
LED	local economic development
N\$	Namibian dollar
NGO	non-governmental organisation
NHC	National Heritage Council
NTDP	Namibia Tourism Development Programme
SADC	Southern African Development Community
SIDA	Swedish International Development Cooperation Agency
SMME	small, medium and micro-enterprise
Unesco	United Nations Educational, Scientific and Cultural Organisation
UNWTO	United Nations World Tourism Organisation
US\$	American dollar
WHS	World Heritage Site
WTM	World Travel Market

Executive summary

The Development Bank of Southern Africa (DBSA), in conjunction with the African World Heritage Fund (AWHF) and ComMark Trust, has undertaken a number of case studies on cultural world heritage sites in southern and eastern Africa. This document synthesises findings from four such sites, drawing parallels between them and identifying lessons to be shared from best practice. The sites considered are Twyfelfontein in Namibia, Kilwa Kisiwani in Tanzania, Great Zimbabwe in Zimbabwe, and the Cradle of Humankind in South Africa.

The main themes dealt with in this study are among the most critical considerations for responsible and sustainable destination development, namely institutional arrangements and stakeholder coordination; local economic development; and visitor experiences and facilities.

A number of critical lessons have emerged from the study. These include the following:

- Coordination cannot be assumed to happen between stakeholder groups as a matter of course. Joint management committee structures should be established and meetings held regularly.
- Dedicated SMME and/or community development agencies are necessary in order to create meaningful business opportunities for host communities. Heritage management authorities seldom have the mandate and skills to drive local economic development (LED). Local and regional governments may not have sufficient capacity, nor is the private sector always adequately organised.
- Apportionment of visitor fees into a community trust or similar structure that is managed by community representatives can be appropriate for sites where community dynamics are relatively clear and community groups are not too numerous or diverse. Where diverse and large host communities exist, a corporate social investment fund for community projects may be a mechanism for distributing a percentage of income at sites to socioeconomic or environmental projects.
- Creating preferential access for local people to certain economic opportunities, such as employment, craft development and other services in the tourism value chain (e.g. tour guiding and local transportation), can ensure that benefits are captured locally.
- Visitor fees should represent value for money and be differentiated for local and foreign visitors, school children and other groups. Outreach activities to host communities with respect to site usage should also be encouraged.
- Good interpretative and visitor facilities and materials are required in order to share the cultural importance and significance of the sites. These need not be capital intensive or elaborate in design (e.g. Twyfelfontein's visitor centre is relatively small with a simple structure), but they should provide a minimum level of information and orientation for visitors.

When developing cultural world heritage sites to be key anchor projects for tourism destinations, a number of elements need to be present. Apart from the site itself and certain of the modalities at the site, as described above, other elements for destination success include private sector investment in services and facilities around sites; correct destination pricing, positioning and marketing; human resources and capabilities, including collaboration across stakeholder groups and dedicated agencies; broader beneficiation from the site for host communities; transport infrastructure; and physical accessibility.

Of the four sites considered in this study, Great Zimbabwe and Twyfelfontein have had a marked impact on the development of tourist destinations in their regions. Although the Cradle of Humankind is relatively new, and occurs in a relatively developed tourism area, the increase in the number of tourism businesses from 68 in 1999 to 401 in 2009 can be partly ascribed to the listing of the site with Unesco and actual investment by the government since 1999.

The Kilwa Kisiwani world heritage site in Tanzania has not yet made a marked contribution to the socioeconomic development of the Kilwa district. This is likely to change, however, with the completion of an access road from Dar es Salaam, and the Ministry of Tourism's new project to develop and position the site.

This study provides practical lessons on institutional structures, LED mechanisms and visitor experiences. It shows what is required for a cultural site to drive tourism destination development, including in rural areas, where tourism is often one of only a few industry opportunities. Furthermore, it has specific practical application for technical assistance initiatives, as well as for financing to develop a cultural tourism attraction.

Cultural world heritage site scan:

Lessons from four sites¹

1. Introduction

The Development Bank of Southern Africa (DBSA), in conjunction with the African World Heritage Fund (AWHF) and ComMark Trust, has undertaken a number of case studies on cultural world heritage sites (WHSs) in southern and eastern Africa. This document synthesises the findings from the case study sites, drawing parallels between them and identifying lessons to be shared from best practice. The four sites are Twyfelfontein in Namibia, Kilwa Kisiwani in Tanzania, Great Zimbabwe in Zimbabwe and the Cradle of Humankind in South Africa.

¹ The DBSA would like to acknowledge the support of the African World Heritage Fund and ComMark Trust in the case study research, as well as the many individuals and institutions interviewed in the course of the study. In particular, we thank the National Heritage Council of Namibia, the Ministry of Antiquities in Tanzania, the Cradle of Humankind Management Authority in South Africa, and the National Museums and Monuments of Zimbabwe for their extensive logistical and technical support in the case study research.

Currently, 114 sites in Africa are inscribed on the World Heritage List of the United Nations Educational, Scientific and Cultural Organisation (Unesco). Of these, 38 are in North Africa and the remaining 76 are in the sub-Saharan region. These sites have been proclaimed world heritage because of their outstanding universal value. Compared with other continents, however, Africa lags behind in the number of such sites, with 114 out of 878 sites. Moreover, almost half of its sites (14 of 31) appear on the List of World Heritage in Danger.

The AWHF was established in 2006 to assist African countries in increasing the number of African sites inscribed on the World Heritage List, and also to improve the management and conservation of African WHSs, especially those that appear on the danger list. Part of the strategy involves improving local economic development (LED) in the areas surrounding WHSs, particularly through tourism.

The DBSA's interest in this cultural research project similarly relates to how tourism can be utilised for LED, with key cultural tourism attractions such as WHSs serving as anchor projects. In particular, the DBSA seeks to understand how best to develop African WHSs as drivers of tourism destination development in order to unlock the economic opportunities and benefits that tourism can bring to such (often rural) areas. For the purposes of this analysis, cultural sites are simply those defined by Unesco as having global cultural significance.²

ComMark Trust, a non-profit policy institute focusing on the Southern African Development Community (SADC), is committed to making markets work for the poor. Tourism is one of its focus sectors for LED, community participation and benefit sharing. Given their shared interests and objectives, the DBSA partnered with the AWHF and ComMark Trust in undertaking case studies on cultural tourism. This document highlights certain lessons, with particular reference to institutional structures and stakeholder coordination, local economic development, and the visitor experience. Other critical considerations such as land use, environmental and resource management, infrastructure development, science and education and financial planning are not the focus of this scan.

2. Site description and background

Kilwa Kisiwani is an island off mainland Tanzania that contains ruins from an Omani settlement. Together with the island of Songo Mnara, it was declared a cultural WHS in 1981. Located on the southern coast of Tanzania, some 333 km south of Dar es Salaam, the island of Kilwa Kisiwani "has been inhabited since at least the ninth century AD" (Moon, 2005). The numerous structures found on the island are the remains of what was once a great Swahili city-state.

² According to the World Heritage Convention of 1972, "cultural heritage" includes monuments (architectural works, works of monumental sculpture and painting, elements or structures of an archaeological nature, inscriptions, cave dwellings and combinations of features that are of outstanding universal value from the point of view of history, art or science); groups of buildings (groups of separate or connected buildings which, because of their architecture, their homogeneity or their place in the landscape, are of outstanding universal value from the point of view of history, art or science); and sites (works of man or the combined works of nature and man, and areas including archaeological sites that are of outstanding universal value from the historical, aesthetic, ethnological or anthropological point of view).

Twyfelfontein, or /Ui-//aes, is located in Northern Namibia and contains thousands of rock art drawings produced by San. It occurs in a rural area that is currently managed by the Uibasen Conservancy. The site has been listed due to the uniqueness of the rock art in the area. It was inscribed by the National Heritage Council of Namibia in 2007 (Unesco, 2007).

Great Zimbabwe is located in Southern Zimbabwe, 27 km from Masvingo. These ruins of an African kingdom comprise stone walls spread over some distance, including the Hill Ruins, the Great Enclosure and the Valley Ruins. Records show that the buildings were constructed sometime between 1150 and 1450 AD. A community of thousands lived at the site before moving away, perhaps due to the area becoming denuded from overuse. The site was inscribed by Unesco in 1985 and also lent its name to the country at independence.

In 1999, the fossil hominid sites of Sterkfontein, Swartkrans, Kromdraai and Environs were formally inscribed with Unesco and are colloquially known as the Cradle of Humankind. The Cradle of Humankind Management Authority is the Gauteng provincial agency appointed to manage the development of the sites, primarily those in the Gauteng province. The demarcated WHS area is close to Mogale City on the West Rand and spans 1 247 subdivided farm portions in northern Gauteng, extending into the North-West province. Local authorities include the West Rand District Municipality and Mogale City Local Municipality in Gauteng, as well as the Bojanala Platinum District Municipality and Madibeng Local Municipality in North-West. The main visitor sites – the Sterkfontein Caves and Maropeng visitor centre – are only 45 km from Johannesburg city centre and 40 km from Tshwane. It is on these two visitor attractions that the analysis focuses.

Twyfelfontein is the most rural of the sites, with the smallest host community (around 300 people). There are around 1 000 residents on the island of Kilwa Kisiwani. The Cradle of Humankind has a local population of around 14 600 people, many of whom live on commercial farms. Great Zimbabwe has an estimated 20 000 to 30 000 community members under the traditional authority of three chiefs and one headman.

Although they are located close to regional capitals, both Great Zimbabwe and Kilwa Kisiwani fall within economically marginalised areas. The Cradle of Humankind is typical of many South African peri-urban spaces, in that it borders both affluent and impoverished communities, and both industry and residential developments. Its heterogeneous population includes migrants from other provinces and neighbouring countries, as well as many South African farm workers and their descendants. Twyfelfontein is situated in a rural area and the community has little access to basic services and infrastructure, and no potable water.

Figure 1: Map and pictures of the four case study sites in the SADC



Sources: <http://www.googlemaps.co.za>; <http://www.maropeng.co.za>; and the author's photographs



Fossil of Little Foot, Cradle of Humankind



Great Zimbabwe



Kilwa Kisiwani: the Great Palace



Twyfelfontein rock art

3. Findings

3.1 Institutional arrangements and stakeholder coordination

As WHSs are sites of global significance, they should be protected. This requires participation by, and support from, many stakeholder groups, as well as benefits for them. Stakeholders include local communities, private sector tourism players and the government. Both local and international non-governmental organisations (NGOs) are often stakeholders that play a role in terms of community and enterprise development, environmental conservation and humanitarian relief. Without support from local parties and their “co-ownership” of sites, the sustainability of such sites cannot be guaranteed. Unesco requires a number of cooperative management systems to be in place at sites in order to manage local stakeholder dynamics.

Of the four sites in this study, three are managed by the national heritage authorities. In the case of Namibia and Zimbabwe, these institutions are agencies of the state, whereas in Tanzania, the Ministry of Antiquities is responsible for managing heritage sites. The Cradle of Humankind Management Authority is a trading entity created by the Gauteng provincial government on behalf of the national Ministry of Environmental Affairs, for the specific purpose of managing the Cradle of Humankind site. It was set up as one of the then Premier’s Blue IQ projects, which are a number of high-impact, high-priority projects for the province, with a specific focus on tourism.

All four sites have challenging relationships with stakeholders, which is typical of multi-stakeholder environments. At the Cradle of Humankind, many tourism businesses are in operation, some of which pre-date the inscription of the site in 1999. Furthermore, there are no homogeneous community groups or fully representative structures, although many associations and cooperative structures exist that represent certain stakeholder groups. Residents of the area are drawn from across the country and the region. Stakeholder coordination is thus difficult, with a myriad government, private and community players in the area and various conflicting agendas and expectations.

The remoteness of Twyfelfontein has meant that the number of site stakeholders and potential beneficiaries of the project is limited, which makes coordination easier. Despite the few stakeholder groups, and the generally good relations between them, tensions do from time to time arise between the conservancy structure (which represents the community), the management authority and the private sector around specific issues, such as access to infrastructure, management of the conservancy, tour guides, and the like.

At Great Zimbabwe, with its estimated 20 000 local residents who fall under three chiefs and one headman in the immediate areas around the site, management of local stakeholder dynamics by the management authority is a balancing act between the various community groups. In a sense, the

demands and/or expectations that communities and their chiefs have of the site have been limited due to their own fragmentation.

Residents of the island of Kilwa Kisiwani live among the ruins, but have seen little direct economic benefit from this proximity. Their expectations of the site and management authority relate to improved communication and the creation, or facilitation, of benefits. Furthermore, the large mainland population also hopes to benefit from tourism, and a number of community groups have been established to this end (TCMP, 2001).

3.1.1 Joint management committees

Joint management committees (JMCs) are an important mechanism for coordinating stakeholders and are one of the coordination mechanisms for WHSs that Unesco recommends. Of the four sites visited, only Twyfelfontein has a functioning JMC. The committee meets on an issues basis, rather than as a matter of course. At both Kilwa Kisiwani and Great Zimbabwe, community groups expressed their desire for greater interaction with, and cooperation in, site management, as no regular stakeholder meetings are held.

The Cradle of Humankind does not hold regular formal JMC meetings, but has public meetings twice a year. There are also a number of committees that convene stakeholder groups on specific matters. These include a tourism liaison committee, a scientific advisory committee and a marketing working group. Numerous bilateral meetings are held with various stakeholder bodies on an ongoing basis.

3.1.2 Land management arrangements

Providing community rights over land management allows for a direct stream of benefits from sites, as well as ancillary tourism services.

Twyfelfontein in Namibia has a conservancy, a legal vehicle that has been provided with management and utilisation of the land in the area through the 1996 amendments to the Nature Conservation Ordinance of 1975. Local communities may use the land and draw income through their own activities or through concession-style arrangements with private sector operators. The community thus benefits directly, not only from the site and its entrance fees, but also from concession fees in the form of a bed-night levy received from providers of private accommodation in the area.

None of the other three sites have this form of land management beneficiation in place for local communities. Due to the complexity of the peri-urban communities of Maropeng and Sterkfontein, and the many landowners in the area, this land management mechanism is inappropriate for the Cradle of Humankind. Nor is it an easy fit at Great Zimbabwe. The islanders of Kilwa Kisiwani could

potentially benefit from a similar mechanism, although the Tanzanian legal framework would need to be revisited to support this approach to community land usage.³

3.1.3 NGO support for community groups

Dedicated unaffiliated NGOs can play an important role in developing small, medium and micro-enterprises (SMMEs) and ensuring community participation at sites where the government and other stakeholders have inadequate capacity, or where the environment is highly politicised. They can also support community and local entrepreneurial ventures.

The Namibia Community-Based Tourism Association (Nacobta), a Namibian NGO active in community-based tourism,⁴ facilitated the training of local guides and the establishment of conservancy bed-levy structures in Twyfelfontein. However, although the rock art was produced by San who once lived in the area, these people and/or their descendants are not actively involved in decisions relating to the site, nor do they receive any benefits flowing from it.

Despite having a great number of stakeholders who are interested in the area (particularly from international agencies and governments), Kilwa Kisiwani does not benefit from a dedicated SMME or LED agency that could assist with value-chain analysis and the deliberate structuring of SMME opportunities. The district government does not have a dedicated person dealing with tourism and cannot give the level of support required to structure economic relationships among local stakeholders. The Ministry of Tourism does not have staff on the ground in the area, and there is no tourism association. A politically unaffiliated organisation could undoubtedly assist in building small businesses and community businesses in the area. The Aga Khan fund, which is already active in Zanzibar, is an example of the sort of organisation that can play this role. The Christian Refugees Organisation has also expressed an interest, despite its religious affiliations.

In Great Zimbabwe, there is no clearly mandated institution dealing with tourism, supply chain business development and enterprise opportunities. NGOs active in the area focus more on agricultural inputs and humanitarian relief than on developing tourism enterprise. The government is highly nationalised in Zimbabwe, with the Zimbabwe Tourism Authority based in Harare, although a new regional office recently opened in Masvingo. There is a local publicity association in the town, but it is not particularly active in marketing the area, or in lobbying the government on behalf of stakeholders in the tourism industry.

At the Cradle of Humankind in South Africa, there is no NGO active in the development of tourism SMMEs. In South Africa, tourism SMME development is a concurrent function, with a number of

³ Other forms of extracting community benefits from sites are discussed in more detail under section 3.2 (Local economic development) below.

⁴ Nacobta is no longer active in the area. Some of the tourism developments could benefit from the continued support, focus and intermediation of such an NGO.

government departments and agencies (such as the Tourism Enterprise Partnership) active in this regard. In practice, however, this sometimes means that no one institution takes the lead and not much action takes place on the ground. At the Cradle of Humankind, it appears that the original plans included a community development trust that would, among other things, appoint an implementing agency to support small business. The trust is currently being reconstituted with socioeconomic development in the area as a priority, particularly community benefit programmes and support for scientific research.

In the absence of dedicated SMME support institutions, the responsibility often falls on the heritage management authorities (HMAs) at sites, which seldom have the skills and resources, or the desire, to provide this level of support.

3.1.4 Private sector partnerships

Strong private sector operators can play an important role in supporting site development, the communities and the management authority at the site, as well as creating LED in the area around a WHS. Other than at Kilwa Kisiwani, which is in a unique position as an island site, the other three sites have a variety of private sector operators within either the core or the buffer areas of the WHSs.

In all three these cases, WHS inscription was awarded after certain lodges or hotels were already operating in the area. This has limited resulting legal mechanisms for managing the relationships with respect to formal lease and other agreements between the HMAs and the private sector operators.

As already indicated, the conservancy arrangement at Twyfelfontein has afforded the local community a mechanism for leveraging formally structured benefits from lodge activities. (This conservancy arrangement is explicitly not a function of the WHS.) In addition to lease fees, the Twyfelfontein Country Lodge also provides a number of services to the WHS and communities in the area, including banking facilities, water and telephones.

Great Zimbabwe has a fully owned private sector lodge within the demarcated core area of the site. The Great Zimbabwe Hotel is owned and run by the African Sun hotel group. The hotel has full title and pays no rental or other fees to the National Monuments and Museums Council, as it predates the WHS inscription of the site. The hotel management ran the curio shop on the site's grounds until recently, but this arrangement was terminated due to the conflict of interest between the hotel's own curio shop and the official curio shop of the Great Zimbabwe Ruins.

Unlike the other three sites, the Cradle of Humankind has a formal public-private partnership agreement in place with a private sector operator of the visitor facilities. The partnership was

awarded through a competitive process, and the operator has taken responsibility for the day-to-day running of the visitor facilities, marketing, and the display and interpretative materials. As the significance to Unesco of the site relates to its fossils, much of the expenditure on the Sterkfontein Caves experience and Maropeng visitors' centre has been on providing an interpretative experience that is both educational and enjoyable.

Furthermore, tourism has grown in the Magalies area, with new tourism businesses opening and others expanding. It is, however, difficult to link this growth in tourism to the WHS as such, as there are many other factors and draw cards in the area, such as the proximity to Gauteng markets, the demand for business conferencing facilities, the Lion Park, and other tourist activities and attractions. Some private sector operators do not ascribe their increased tourism developments and markets to the Cradle of Humankind's visitor attractions.

A number of the general managers in the Cradle of Humankind area meet regularly to discuss shared concerns. One concern relates to the additional environmental standards that come with being located within a WHS, which restrict further property development. Some, but not all, private sector parties view the strength of the management authority in this regard as a barrier to private sector development. The major landowners have organised another private sector group in the area known as the Cradle Conservation Foundation.

There is no private sector investment on the island of Kilwa Kisiwani. A number of lodges have been developed on the mainland opposite the island, largely on leasehold land. These lodges are relatively small and there are no formal community beneficiation structures in place. They are not active in cooperative marketing or in planning broader destination development. They struggle to retain skilled managers, as the destination is viewed as something of a backwater. Thus, the private sector at Kilwa Kisiwani does not play a particularly developmental role.

The private sector needs to be convinced that benefits can be derived from its incorporation into, or proximity to, a WHS. Without this conviction, private sector cooperation will be limited and WHS status may be seen as a form of "tax".

3.1.5 International stakeholder involvement

International stakeholder groups are particularly active at WHSs in many parts of Africa, albeit to a lesser extent in South Africa. Their involvement often relates to capital investment and technical work, such as rehabilitating sites and establishing interpretative facilities and services.

Much of the work at Kilwa Kisiwani has been funded by Unesco, the French government and other international donors, such as the Japan International Cooperation Agency (JICA) and the Netherlands Development Organisation (SNV). The new ecotourism specialist at the Ministry of Tourism, who is championing a process to develop Kilwa Kisiwani, is funded by the French Embassy.

Twyfelfontein's infrastructure development was funded by the European Union, through the Namibia Tourism Development Programme (NTDP). Unesco and the National Heritage Council (NHC) have jointly funded tour guide training on the implementation of the site management plan (NHC, 2005). The NHC also makes an annual budget allocation towards tour guide training.

Great Zimbabwe receives operational funding from the United States government for security guards, particularly for the museum on the site. Funding has also been received from the Culture Fund of the Swedish International Development Cooperation Agency (SIDA) for development of the site. The national Public Investment Fund, which operated on a 50-50 co-funding basis, assisted in building infrastructure, such as rondavels and lodges. These have subsequently been refurbished and renovated into tourist accommodation. Unesco has occasionally provided grants, such as the grant for fire-fighting equipment received in the 1990s.

In South Africa, the Gauteng fiscus supplied the finance for capital investment at Maropeng and Sterkfontein. As mentioned, the Cradle of Humankind was initially one of the provincial priority projects known as Blue IQ. This has helped to achieve substantial allocations of funding from the government, with R163 million in capital investment spent to date, and more on roads and operational funding.

3.1.6 Tourism organisations and associations

JMCs are formal structures for managing WHSs, not broader destinations. In areas where there are many stakeholder groups and a large heterogeneous population, other stakeholder forums are needed to address issues around tourism development and marketing. Neither of these functions are typically core responsibilities of HMAs. In environments where several mandated bodies are dysfunctional, or undercapacitated, many of the frustrations and/or expectations that stakeholders level at site managers are, in fact, not appropriately directed. Building other strong institutions will greatly assist in site management, but it should be understood that this is not a short-term project.

Reference has already been made to SMME development agencies or NGOs with community or local industry development agenda, which contribute to local supply chain development. Local and/or regional tourism organisations can also play a role in the broader management of tourism interests in an area, as well as in shaping and executing plans. The government has a part to play in all such bodies, but should not necessarily try to fulfil all these various roles.

In the case of Kilwa Kisiwani, where the government and the private sector are both weak in terms of the necessary capacities (skills, experience and actual bodies), another champion needs to drive the formalisation of structures and plans in the short term. The Ministry of Tourism, within the Department of Tourism, Conservation and Antiquities, has taken on this leading role. A recently

convened process by this department has sought to mobilise all stakeholders in terms of a jointly agreed plan for the site and the area. The presidency has formally endorsed this approach. Great Zimbabwe has a publicity association at Masvingo, as well as a regional office of the Zimbabwe Tourism Authority that has recently opened. Neither appears to be active in product development, SMME development or marketing. The opportunity therefore exists to leverage these regional organisations. Twyfelfontein does not have a tourism association, possibly because there are too few local stakeholders. The stakeholders work closely with the management authority when needs arise.

There are different forms of tourism industry associations close to the Maropeng and Sterkfontein Caves – the Magalies Meander and Crocodile Ramble are two marketing associations. Within the more immediate area of the visitor centres, a general manager’s forum meets monthly to discuss issues of common concern. The operator engages these bodies, as does the management authority. The integrated master plan for the Cradle of Humankind indicates that a voluntary tourism association will be established in the area to maintain standards and represent service providers in the area. This destination tourism organisation is not yet in place, as there is some resistance from the private sector to common branding and the fees it has to pay to the management authority in this regard. The Cradle of Humankind Management Authority has, however, already played a role in marketing and promoting the destination at major events, such as the Tourism Indaba, International Tourism Bourse (ITB) and the World Travel Market (WTM).

3.1.7 Planning

Different kinds of information and plans are needed to guide strategic operations. For instance, site management plans are necessary to encapsulate the many functions carried out on a site. Visitor information systems and reports that capture the number of visitors, their origin, length of stay, spending patterns, and so on are necessary when planning for tourism. Planning considerations should be closely linked to the institutional arrangements and stakeholder coordination. Many of the sites could improve their information management and planning systems in this regard.

In the case of Twyfelfontein, visitor records are not readily available and have to be generated on request. As visitors provide a critical revenue base not only for the site, but also for the NHC at large, these records should ideally be up to date and available at all times. This could assist staff with operational planning, as well as facilitating service and product innovations.

Great Zimbabwe has visitor data available on request, but no site management plan. Despite not having an up-to-date joint management plan, several management systems and procedures have been in place at Great Zimbabwe for some years. These include firebreaks, visitor records and community engagement modalities. Although regular site activities might be well established

among staff, plans can be useful to mobilise agreement formally among stakeholders regarding objectives, activities and targets. Clear plans can also be devised to leverage political support. However, plans require political and institutional will behind them to ensure that they are eventually implemented.

Over the years, a number of plans and tourism strategies have been developed for the Kilwa district, and Kilwa Kisiwani in particular, but these are not archived in one place and are not easily accessible. Based on discussions with stakeholders, it also appears unlikely that these plans are being implemented. The Kilwa tourism master plan (Mapunda, 2005) is contained in a detailed document providing many useful recommendations for developing the area for the benefit of local people, but it appears not to have been implemented. Furthermore, no formal site management plan was available from site managers during, or after, the site visit.

The Cradle of Humankind has detailed and up-to-date plans, including an integrated master plan, as required by the World Heritage Convention Act. Over the past ten years, the management authority has commissioned much research into the area, including comprehensive tourism demand research, as well as tourism and investment research work. There is also a research and planning unit in the management authority. The various plans appear to be well utilised for the authority's activities and by certain of the major landowners in the area.

3.2 Local economic development

Tourism can be a positive force for LED, but this requires interventions for maximising local linkages in tourist activities, and minimising leakage of revenues from the area. Approaches to building LED include building local suppliers and businesses, and procuring goods and services from them; hiring locally; training staff and communities; establishing corporate social investment funds and cooperative partnerships (e.g. to support community initiatives in or near the site). Allocating or apportioning a certain share of visitor fees to community structures or community development funds is also a way of sharing proceeds.

None of the sites under study appears to have a multifaceted, explicit LED strategy in place, although the Cradle of Humankind (2008: 1) has LED as an explicit objective: "The economic rationale ... is to stimulate private sector investment in tourism development, in order to promote broad-based black economic empowerment ..., SMME development, economic growth and job creation in the project areas." Using tourism as a mechanism for increasing LED is an objective of the Gauteng government in developing Sterkfontein and Maropeng at the Cradle of Humankind. Another objective is to put Africa, and South Africa, squarely on the global map as the "origin of humankind". Culturally and symbolically, this is an important objective, which is in line with the broader African Renaissance project of the then President, Thabo Mbeki. Conservation, science and education are other key objectives for the site.

The Great Zimbabwe Ruins have significant national importance as a symbol of the country's heritage and, as mentioned, for giving the country its name at independence. There are, however, no clear LED strategies in place. Socioeconomic projects exist, but are ad hoc by nature. Kilwa Kisiwani does not receive as much attention as other more prominent and better known WHSs in Tanzania, such as Zanzibar, Ngorongoro and Mount Kiliminjaro. No LED strategies are in place. In the initial phases of destination development, Twyfelfontein received LED support from Nacobta, with a focus on community development. This support appears to have partly fallen away.

A number of ways in which sites can (and, in certain instances, do) benefit LED, are explored below.

3.2.1 Apportionment of visitor fees

It may be possible to apportion visitor fees in areas where clear community structures exist. An alternative may be to establish a community development trust for promoting community development and research objectives broadly, as in the case of the Cradle of Humankind. Apportioning fees means that community funds are tied to the performance of the site. This creates an incentive, but might lead to resentment or suspicion when times are tough. Community management structures should be held accountable for amounts received and spent in line with broader community objectives.

Of the four sites surveyed, only Twyfelfontein apportions some of its visitor fees to the community. In this instance, the legal mechanism through which the community transacts, the Uibasen Conservancy, receives 35% of the visitor fee of N\$10 per person. Of this, 5% is retained by the conservancy and the rest is paid over to the Tour Guides Association for services rendered by tour guides from the community.

It may be possible to introduce an apportionment of visitor fees at Kilwa Kisiwani for the island community. It may, however, prove less viable a mechanism for redistribution and LED at Great Zimbabwe, where there are three chiefs; and at the Cradle of Humankind, where the community is heterogeneous and very large. The apportionment of fees is most effective where there is one community beneficiary group that is relatively small. There is, however, an opportunity to set up a community development trust or similar vehicle at the other sites.⁵

3.2.2 Concession fees

Concession fees can be charged from tourism operations on a site if a legal mechanism exists for communities to have land management rights. At Twyfelfontein, the private sector lodges in the area pay concession fees to the conservancy, with which they have a concession agreement. This agreement is based on a bed-night levy – thus the income to the conservancy is closely linked to the performance of the lodges.

⁵ This is discussed in section 3.2.7 (Corporate social investment).

The other three sites do not have this mechanism in place, as no formal transacting entities for community land management exist. On the island of Kilwa Kisiwani, the islanders have no formal land management transacting rights, although they appear to have an interest in developing certain tourist facilities of their own. At Great Zimbabwe, many of the lodges and hotels have been operating in the area for many years, which makes it difficult to introduce some form of concession fee retroactively. Land surrounding the Cradle of Humankind is largely privately owned and there is no communally owned land in the area for community transaction purposes.

3.2.3 Direct employment benefits

Great Zimbabwe has 69 employees in its organogram, of which about 60 posts are filled. This is a significant number, compared with Kilwa Kisiwani's five employees and Twyfelfontein's five. About half of the 60 employees are from the Masvingo area, typically in more junior posts, as only certain of the more junior grades are advertised locally. More senior grades are advertised nationally.

At Sterkfontein and Maropeng, personnel are formally employed by the operating company, Maropeng l'Africa, which successfully won the concession to operate the visitor facilities. Here the staff complement amounts to 110, inclusive of the food and beverage operations and the hotel. The concession contract the Cradle of Humankind has with the operator stipulates that most staff should be hired locally and trained. Given the peri-urban nature of the area and the large heterogeneous communities living there, the effect of this policy is relatively small, despite the significant employment numbers, compared with the other WHSs considered in this study.

There is also a small staff complement of 15–20 employees at the Cradle of Humankind Management Authority, as well as other staff who fulfil support functions. A report on the capital expenditure programme for roads in the area attributes 1 520 temporary employment opportunities to this form of infrastructure development. Beyond the Sterkfontein and Maropeng visitor facilities, there are some 398 private sector tourism operations in the area, all of which create employment.

Of Twyfelfontein's staff of five, some are local and some from outside the area (notably the more senior posts), despite the policy to hire locally. Site management indicated that it is difficult to find the requisite skills in the area.

3.2.4 Tour guides

Tour guides can be part of the staff complement, or the function outsourced to designated groups. This role is fairly technical in nature and has a major impact on visitors' experience of the site. It is critical, therefore, that tour guides are well trained in the subject matter and are enthusiastic about their work.

The Sterkfontein Caves and Maropeng visitor centre share about 11 tour guides across the facilities, all of whom are employees. Training materials and the actual training of the guides were funded by the management authority. At Great Zimbabwe, tour guides are permanent employees. At Twyfelfontein, rather than employing guides onto the NHC payroll, a tour guide association comprising community members has been set up. There were originally 25 members, but their number is down to 15. Here employment is “outsourced” to the community, although the council provides certain internal functions and support, such as training, to the tour guides.

There are six formal tour guides in Kilwa, but they are not attached to either the Ministry of Antiquities’ site management or a community structure that has a formal agreement with the Ministry. These individuals have undergone formal training on tour guiding and have operated without formal institutional structures. Certain tour guides have established good relationships with private sector lodges in the area, and work with tour groups staying at these facilities. There is currently insufficient demand from visitors to generate significant work for these trained tour guides, or to create the rationale for expanding tour guide training to others. In time, it might be necessary to train more tour guides and assist them in establishing an association that can lobby the Ministry of Antiquities in order to receive benefits formally.

3.2.5 Employment in the destination area

Although the staff complement at Twyfelfontein visitor centre is small, many members of the local community are employed at the Twyfelfontein Country Lodge, a large accommodation establishment close to the site. Employment opportunities have also been created at the other accommodation establishments in the area.

At Great Zimbabwe, it was not clear how many of the staff of hotels in the area were locals, although it is likely that many of the jobs would be filled by local people. One hotelier indicated a preference for local staff due to transportation and other logistical considerations.

Kilwa Masoko, the mainland opposite Kilwa Kisiwani, has five lodges operating at, or near to, an international standard. None of them are particularly busy and managers do not stay long. Staff is drawn from the area, although management seldom is. About 30 jobs have been created by these five lodges.

Research undertaken for the Cradle of Humankind estimates the total number of jobs created through tourism – including direct tourist spend, as well as spend created through the facilities and services supporting tourism – at 6 175. This number includes 4 100 jobs created within the study area and 2 075 created outside of it.

3.2.6 Enterprise development

At Twyfelfontein, an opportunity has been created for local crafters to exhibit and sell their craft produce at the shop at the visitor centre. Close inspection of the craft produce has revealed that not all items are locally made by the community. Further, the quality and pricing of the craft items could be improved upon.

Great Zimbabwe indirectly supports the craft market adjacent to the WHS by not selling similar products in its craft shop and thus not introducing competition for those items. Discussions with chiefs in the area indicated that some of the crafters and wares are not local. Furthermore, the products on sale are not particularly site relevant – the typical Zimbabwe soapstone statues abound. It is not clear how successful crafters are at the roadside market, as visitor volumes are very low. The site management is in the process of setting up a traditional village inside the WHS, where members of the local communities will make and sell crafts and undertake traditional dancing, and where visitors can meet a sangoma. This village has been under development for some time.

Kilwa Kisiwani has nothing in place to benefit local people deliberately through tourism in the area. The visitor fee is very low and not currently apportioned to the islanders. There are no formal providers of transport to the island, or of services on the island. Of the five tour guides, three are from the island itself and two from the mainland. A number of community groups, however, have organised themselves for tourism, namely Kilwa Cultural Centre on the island, and Chagamoto and Mkudje, among others, on the mainland. The trickle of visitors to the area does not yet support regular activities or income to these community groups.

3.2.7 Corporate social investment

In the case of the Cradle of Humankind, a community development trust has been set up to fund projects for community development and research. This fund is to comprise 7.5% of revenue once the operator breaks even at around 400 000 to 500 000 visitors per annum. As visitor numbers have not been achieved in line with the original market and financial assessment for the project, the community development trust – the Cradle Trust – has not been able to draw on the 7.5% concession fee and has, therefore, developed no projects for community benefit.

This situation is problematic as, other than some employment opportunities at the site, direct community benefits from the site remain limited and no sense of local “ownership” exists among host communities. These are both the largely white, land-owning and business-operating communities and the black, working or unemployed communities. Work is currently under way to reconstitute and energise the Cradle Trust.

3.3 Visitor experience

Allowing income at sites to be retained by HMAs for their own use creates an incentive for reinvestment in sites and visitor experience; as well as for finding creative ways of extending visitor expenditure. Put succinctly, the longer the trip and the more the spend, the better the LED effect.

3.3.1 Core asset management

The main business of HMAs is to protect the actual core assets – the rock art, ruins, fossils, and the like. The Cradle of Humankind authority does this in conjunction with Wits University, which has much of the specialist technical paleontological skills. The other three sites undertake heritage management themselves, sometimes with the help of international bodies.

The Cradle of Humankind has a fossil site management plan and holds regular site inspections. Access to the Sterkfontein Caves is managed through specific departure times for guided walks, and the groups are supervised by tour guides. Furthermore, the actual site where fossils are excavated is barricaded from tourists. The Maropeng visitor centre was developed explicitly to keep visitors away from these fragile cave environments.

At Kilwa, the site office of the Ministry of Antiquities is no longer on the island, as there is no electricity. This has removed the Ministry from the day-to-day protection of the ruins. Unesco, together with the Ministry and other players are, however, quite active in rehabilitating the ruins. The threats from erosion and settlements close to the ruins are among the reasons why Unesco has classified the site as being in danger.

Of Twyfelfontein's plentiful rock art, only certain sites are accessible to tourists on paths specifically developed for tours. Most visitors are encouraged to make use of an official tour guide, as this service is included in the admission ticket fee. The actual rock art is partly protected by viewing platforms. Discussions around developing more footpaths are taking place.

At Great Zimbabwe, there are paths among the three sites of the Hill Ruins, the Valley Ruins and the Great Enclosure. Security guards are stationed at most of the sites and the museum, but other than this, there is not much in place to restrict site access. The extent of the ruins is significant and it is impossible to supervise every visitor. As accompaniment by an official guide is not compulsory, the threat of damage to the ruins and removal of stones does exist.

Finance for site management and development is largely provided from allocations by the fiscus to the relevant HMAs. In the case of Great Zimbabwe, the authority is allowed to keep all income generated from the site for reinvesting in the site or in the other sites under management in the country. The Maropeng operator uses the income to offset operational costs at the site, as well as

for investment in new exhibitions and materials. After breaking even, 7.5% of all income is to be paid into the Cradle Trust. In Tanzania, income from Kilwa Kisiwani and other heritage sites flows back to the Treasury. This limits the operators' ability to utilise the funds for site investment and development, but legislation in this regard is being amended. In Namibia, Twyfelfontein's funds flow to the NHC, where they are used not only for this site, but also for other sites, which all earn less in visitor fees than does Twyfelfontein.

Income at sites derives largely from entrance fees and other visitor expenditure. When the income can be used at those sites, or others under the same management authority, it creates an incentive for HMAs to try to maximise such income. Where income does not remain with these authorities, and the national government makes allocations on a grant basis without considering the sites' income-generating capacity, there is no direct incentive for them to try to capture more spend. This has serious implications, not only for site managers, but also for communities and other stakeholders in the area, who rely on the site experience to serve as a draw card and establish local revenue flows.

3.3.2 Visitation and pricing

The Cradle of Humankind receives the most visitors. In 2008, figures stood at around 230 000, up by 30% from 2007. The visitor fee is R95 per person at Maropeng, R95 at the Sterkfontein Caves and R150 for a joint ticket. Learners each pay R54. In Namibia, Twyfelfontein received 56 425 visitors in 2008, which is slightly down from 58 707 in 2007, but well up from 40 000 in 2006 (NHC, 2008). Entrance fee is N\$30 per person.

Great Zimbabwe received 15 442 visitors in 2008, down from 27 587 in 2007. The visitor number of 120 993 in 1995/6 is the highest recorded to date. Foreigners pay US\$15 per person and Zimbabweans pay US\$4 per person, whereas children, school groups and teachers all pay less. Kilwa Kisiwani receives about 1 500 visitors per annum, which is fewer than five a day on average. Foreigners are charged 1 500 Tanzanian shillings each, which is equivalent to about US\$1. Tanzanians are charged 500 shillings each.

Schoolchildren are a major source market and an important domestic market at all the sites other than Kilwa Kisiwani. Half of the 230 000 visitors at the Cradle of Humankind in 2008 were school children, although the fee of R54 per learner would probably exclude financially strained schools, or poorer learners, from access to the site. Dorm accommodation is also available on site. Great Zimbabwe received 2 500 schoolchildren in 2008, which is a mere fraction of the numbers of visitors received five and ten years ago. Dorm accommodation is available for groups. Twyfelfontein also receives school groups, although there is an opportunity to expand upon this visitor sector.

Despite its high visitor numbers, the Cradle of Humankind has not achieved its targets in this regard. At Great Zimbabwe, the political and socioeconomic environment in the country has clearly been the main reason for declining visitor numbers. There are some “green shoots” appearing in the market, as certain South African-based overland tour operators started visiting the area again in 2009, but recovery is not likely to be quick.

Kilwa Kisiwani’s low levels of visitation relate to the lack of development and marketing of the site and the area. This relates directly to a lack of institutional capacity and interest across all local stakeholder groups, except for those local community groups who are very keen. Significant competition is also posed by globally branded sites, such as Mount Kilimanjaro, Zanzibar, Ngorongoro and Serengeti. In Namibia, Twyfelfontein benefits from being on the tourist circuit and from the private sector accommodation operations in the area. These contribute to its destination branding and the facilities on offer.

The degree of price sensitivity of foreign visitors with respect to entrance fees at sites has not emerged clearly from the analysis. It appears that foreign visitors are not averse to spending around US\$15 at Maropeng and Sterkfontein, or at Great Zimbabwe. The visitor’s fee at Twyfelfontein is low in comparison, while that of Kilwa Kisiwani is almost non-existent. There may well be space to increase fees for foreign visitors at Twyfelfontein and Kilwa Kisiwani, although the visitor experience should represent value for money. In the case of Kilwa Kisiwani, visitors need to get value for their money, which would require investment in the visitor experience and infrastructure. A substantially higher visitor’s fee would then be achievable.

It is critical that access for nationals, including school groups, is maintained, and indeed enhanced. Maropeng and Sterkfontein do not attract as many South Africans as desired. This might partly be due to pricing around the minimum visitor’s fee of R95 per person, as well as proximity to the market, and the lack of a strong museum-going culture in South Africa. Certainly, the fee of R54 per schoolchild is likely to restrict access.

At N\$30 per person, visitor’s fees at Twyfelfontein are not very high, but could still be a barrier to entry for locals. In reality, this WHS is also very rural and requires a special trip in order to visit, which might also be a barrier to local visitation.

Great Zimbabwe has differentiated pricing for foreigners, nationals and locals, especially local community groups who can get free access for rituals and other activities per prior arrangement with the site management. It was indicated that given the current economic woes, the fee of US\$4 might still be too steep for national visitors.

Kilwa Kisiwani has differentiated pricing in place. With fewer than 1 500 visitors per annum, the price is clearly not the factor keeping either local, national or foreign visitors away. It would be good practice to maintain differentiated pricing as the site develops, and will ensure access for Tanzanians.

3.3.3 Visitor facilities

Providing a well-structured, informative, appropriately priced, accessible and enjoyable visitor experience is a key offering of heritage sites. This is not purely a tourism function; it also relates to conveying the heritage value of the site and its cultural significance to all visitors. This indicates a strongly educational and cultural agenda as well. In order to create a meaningful and rewarding visitor experience, effective facilities, interpretative engagement and materials need to be in place.

Of the four sites, Kilwa Kisiwani is the only one that has a limited visitor offering. This relates to access to, and around, the site; the visitor centre and interpretative materials; refreshments and curios. Guests of private lodges in the area tend to access the site through the lodges, which provide transport and guiding at a fee. Official visitors are typically transported in the Ministry's boat and taken around by site management staff. There are no other formal ways of getting to the site, or of receiving any level of interpretative engagement beyond the sign boards at the various ruins.

Twyfelfontein's small and modest visitor centre has won awards for its design of corrugated iron and other totally renewable materials. It consists of a reception area where entrance fees are paid and tour guides meet guests; a small exhibition area with historical and background information and visual material; a curio and craft shop; an outside café and kiosk where juices can be purchased; and paths to specific decks for viewing rock art.

Great Zimbabwe is a large site that is spread out over a number of areas. It has no formal visitor centre at the entry to the site, although there is a small office. There is also a museum on site, as well as a curio shop, although this is not really functioning at present. The ruins are divided into three areas, namely the Hill Ruins, the Great Enclosure and the Valley Ruins. Signage and interpretation are minimal. A traditional village is under development, although this has stalled. Accommodation exists on site in the form of dormitories for student groups, rondavels and self-catering lodges, and is managed by the authority.

The Cradle of Humankind has two well-developed sites for visitors. The actual caves at Sterkfontein have a significant visitor centre with interpretative rooms, a restaurant-café, a shop, a ticket purchase booth, a walkway and guided experiences of the caves. The large multi-storeyed Maropeng visitor centre, which is a few kilometres away, has substantial parking and edutainment interpretative installations, an underground boat ride, a restaurant, a conference centre and an informal café area. There is also a boutique hotel on site at Maropeng, 500 metres from the visitor centre, as well as dormitory accommodation.

The capital investment in buildings and interpretative materials (around R160 million) is substantially more at the Cradle of Humankind than at the other sites. The provincial government recognised the need for major interpretative facilities, as fossils are not readily accessible, or engaging to, tourists. Future plans include two orientation centres at Lanseria and Magaliesburg; additional

gateways; a network of hiking trails; 40 km of cycling tracks; additional visitor information; and viewing points over the whole site.

In terms of interpretative materials, neither Great Zimbabwe nor Kilwa Kisiwani has adequate site brochures and maps. Without proper site interpretation, including maps and some narrative on the history of the site, visitors rely entirely on guiding. This limits the ability to which visitors can explore sites themselves, if they prefer not to be guided. It also means that they cannot take home literature on the site to pass on to others, or to keep as a record of their visit. A relatively easy way to create a meaningful experience for visitors is to formally provide introductory notes to the site and a map.

Of the four sites, Kilwa Kisiwani is the one most in need of investment in the visitor experience and site interpretation. The other three sites demonstrate ways in which visitor experience can be orchestrated – from the modest visitor centre, structured paths and tour guiding at Twyfelfontein, to Great Zimbabwe’s museum and three main stone ruins over a wide area, to Maropeng and Sterkfontein’s substantial built facilities that draw on global technologies around interpretative displays. The development of formal facilities and organised visitor experiences has the following advantages:

- It structures a largely standardised visitor experience of the sites, with routes and information along the way. This allows all visitors to receive a minimum amount of information and guaranteed experience.
- Environmental impacts can be limited by managed transportation services and marked-out walking routes.
- Direct benefits can be achieved for stakeholder groups, for example, by including tour guiding in the visitor’s fee, or apportioning a percentage of the entrance or visitor’s fee to them.

4. Conclusion: Implications for the DBSA

The DBSA’S Tourism Investment Strategy has identified destination development as its strategic guiding principle. In this regard, major anchor attractions are identified as one of the five themes of projects to be supported. As demonstrated in this study, the ability of cultural WHSs to be major anchor attractions leading to the development of new, significant tourism destinations depends on many factors.

The United Nations World Tourism Organisation (UNWTO, 2008) has indicated a number of basic elements that must be in place to establish and maintain a successful destination. In order to attract visitors and satisfy their needs upon arrival, a destination needs:

- core resources and attractions (natural, built and/or cultural)
- public and private amenities
- accessibility

- human resources
- image and character
- good pricing

In this regard, a cultural WHS can be seen as the core resource or attraction in the area in which it exists. However, this alone is insufficient. A variety of public and private sector facilities are necessary to attract and satisfy visitors, such as tour operators to package the area, accommodation, restaurants, transportation services, information offices, and so on. Getting to the destination, and around it, requires safe and reliable transport infrastructure.

Skilled and motivated people are needed to manage and staff all tourism establishments. At cultural heritage tourist attractions, such as those investigated in this study, a critical challenge is the variety of specialist skills required, from tourism to heritage management, infrastructure development, community development, and the like. HMAs seldom possess all these skill sets. Creative partnerships with technical experts, the private sector and other agencies and bodies can help fulfil different aspects of the sites' mandates, and address the skills and capacity challenges.

Service excellence and appropriate branding, marketing and positioning of the destination will make it known and attractive to visitors, who could recommend it to potential visitors via word of mouth. It is vital that the pricing of the establishment is acceptable to visitors and provides value for money.

Of the four case studies, the Great Zimbabwe and Twyfelfontein cultural WHSs have clearly been the drivers of destination development in their areas. In both instances, private sector infrastructure has developed around the cultural sites to accommodate visitors. Other services, such as tour guiding, tour operating, cultural villages and other attractions, food, beverages and crafting have also developed in their environs. Both sites are on the tourist itinerary in their respective countries, and are purposefully packaged and sold by tour operators. A variety of institutions (public, private, and civil society players) have helped to develop these sites.

The Maropeng and Sterkfontein visitor centres are relatively new, having only been in operation for four years (although Sterkfontein is older and better known than the former). Much private sector development, including tourist facilities, already existed in the area, given the site's proximity to Gauteng. Although the visitor attractions have undoubtedly raised the profile of the area and increased marketing spend, and roads and signage have also been improved, the site cannot take full credit for the development of the destination. The ongoing work of the Cradle of Humankind Management Authority does, however, support the upgrading and protection of the broader destination area. It is expected that, over the medium to long term, more direct projects that will benefit host communities and small business will be pursued.

Kilwa Kisiwani has had a number of factors working against it, most notably institutional fragmentation and weak public and private players in the area. Access to the site has also been severely compromised, although this is changing with the development of a tarred road connecting Kilwa with Dar es Salaam. Competition by other better-known sites has also affected the positioning and marketing of the site. All of this is expected to change with some championing of the site and development of the area by the national government, as well as a commitment to the development of a southern tourist circuit in Tanzania.

Ultimately, the success of tourism – as defined by its contribution to the conservation and development of a site, and the creation of benefits for local people – at these and other cultural tourism sites depends not only on the strategies employed at the sites, but also on the development of the broader tourism environment. Market dynamics have a considerable impact on a site's ability to generate revenues for operations, and on the way in which they are apportioned and utilised for broader destination objectives. The global financial crisis has meant that foreign and domestic tourist demand has been negatively affected. This is likely to affect visitor attractions over the next few years, thus constraining development potential.

This study has demonstrated the complex factors influencing WHS development and management. It points to the need for appropriate institutional structures, relationships, roles, responsibilities, inclusive processes and planning leading to the development of cultural tourism sites. Specific lessons around apportioning fees, structuring visitor experiences, creating employment opportunities, enterprise development and considering institutional forms have been highlighted, with a view to future work on tourist attraction development.

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