

THE LOCAL DEVELOPMENT CHALLENGES OF INDUSTRIAL HERITAGE IN THE DEVELOPING WORLD: EVIDENCE FROM CULLINAN, SOUTH AFRICA

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Abstract: Industrial heritage is attracting a growing focus within the international expansion of research around heritage tourism. The largest share of literature relates to industrial heritage in developed economies. The aim in this paper is to examine industrial heritage tourism in a developing economy context and specifically the challenges of maximising heritage tourism for local development in South Africa. The analysis focuses on the diamond-mining village of Cullinan in Gauteng Province, South Africa. In terms of methods and sources the analysis combines material from policy documents from the provincial and local government, local tourism data, and visitor trends to the heritage site, a visitor survey and key stakeholder interviews. Overall, the results reveal that the assets of industrial heritage tourism are underperforming in terms of growing the local economy at Cullinan. In interpreting this finding the study shows that the key explanations relate to the capacity constraints on local governments in tourism development, planning and management. The analysis shows that capacity constraints at the level of local government must be addressed if the potential of industrial heritage tourism in South Africa is to be maximised for the future benefit of local economies.

Key words: industrial heritage; local economic development; Cullinan; South Africa

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INTRODUCTION

Heritage tourism continues to attract a substantial scholarly interest particularly in developed countries (Ashworth & Larkham, 1994; Cercleux et al., 2011; Garrod & Fyall, 2000; Poria et al., 2001; Timothy & Boyd, 2006; Timothy, 2007; Waterton & Watson, 2015; Alvarez et al., 2016). According to Light (2015) heritage tourism is not, however, a recent international phenomenon. Instead, it is stated that the earliest “examples of this activity can be identified in the visits made by affluent Romans to the ruins of ancient Greece” (Light, 2015: 145). Nevertheless, many heritage tourism scholars often refer to it as a new market niche of tourism (Jansen-Verbeke &

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McKercher, 2010; Sun et al., 2011; Park, 2014). Among several different segments of heritage tourism one of the most distinctive is that of industrial heritage tourism. A number of definitions are offered for industrial heritage tourism. Edwards and Coit (1996) refer to it as “the development of touristic activities and industries on a man-made (sic) site, buildings and landscapes that originated with industrial processes of earlier periods” (Edwards & Coit, 1996). For other observers, industrial heritage tourism “is a practice where old buildings and cultural assets are reinterpreted within a tourism framework” (Cassel & Pashkevich, 2014). Xie (2005) considers that the term “refers to housing, industrial settlements, industrial landscapes, products and processes and documentation of the industrial society”. In a recent international review, Vargas-Sanchez (2015) maintains that industrial heritage tourism is not homogenous. It includes a broad spectrum of types of heritage which relate to industrial and mining centres. Arguably, industrial heritage tourism “is being promoted with ever greater intensity in several destinations” (Vargas-Sanchez, 2015: 220). Indeed, across much of Europe, Cassel and Pashkevich (2011) argue that “efforts to develop heritage tourism are often part of strategies in peripheral regions” to revalue the local culture and find new uses for old buildings and industrial landscapes. One illustration is provided by Bujok et al., (2015) who review the context and revival of industrial heritage in the Czech Republic.

As a whole it is observed that “industrial heritage tourism forms a distinctive, but under-researched, subset of the wider field of heritage tourism” (Edwards & Coit, 1996: 343). Among the most notable academic investigations are works which look at the interpretation of mining heritage (Gouthro & Palmer, 2011; Reeves et al., 2011); the transformation of mines into heritage attractions (Che, 2011; Frew, 2011; Legget, 2011; Hashimoto & Telfer, 2016); and, questions of authenticity in industrial heritage practices (Alonso et al., 2009). Using the case of the United Kingdom, Jansen-Verbeke (2007) explores the nexus between industrial heritage and sustainable tourism development, tracing the history of industrial heritage tourism and asserting the merits and benefits of industrial heritage for tourism purposes. In the international context, it is evident that industrial heritage enjoys considerable appeal as part of promoting urban tourism (Ashworth & Page, 2011; Law, 1992; Firth, 2011; Swensen & Stenbro, 2013; Otgaar et al., 2016). Many cities in developed countries turn to industrial heritage in order to stimulate their local economies, as they endeavour to reinvent themselves in a post-productivist era and sustainably utilise their local resources and heritage assets (Kosmala & Sebestyanski, 2013; Kruczek & Kruczek, 2016; Lee, 2016).

Industrial heritage tourism activities contribute to preserving “a region’s identity and to stimulate the formation of local service activities and employment” (Hospers, 2010: 398). Most scholars concur that the global rise of industrial heritage tourism is associated with deindustrialisation as well as the growth and development in the leisure industry since the 1970s. Together these encouraged the ‘heritagization’ of formerly industrial places (Lee, 2016; Otgaar et al., 2016). Beyond the remodelling of factories or docklands, much industrial heritage tourism relates to the use of former mining operations (Conlin & Jolliffe, 2011; Hashimoto & Telfer, 2016; Kruczek & Kruczek, 2016). Accordingly, it is forwarded that research “that seeks to further our understanding of the relationship between mining heritage; mining communities and tourism should be of paramount importance” (Wilson, 2011). The international trend is towards “the conversion of mining valued for industrial purposes to mining valued for its heritage and tourism aspects” (Conlin & Jolliffe, 2011). Preservation, interpretation, environmental impact, attraction development, sustainable management and future growth are all critical planning issues that impact industrial heritage projects (Conlin & Jolliffe, 2011). Further, as various stakeholders and institutions

have complex and vested interests in these heritage sites, power relations and questions of identity remain critical issues. Indeed, it is stressed that “defining different heritages is not only a matter of telling the right story but also of determining whose story should be told and to what audience” (Cassel & Pashkevich, 2011).

Strong research foci of industrial heritage research are found in the United Kingdom, USA, Scandinavia and post-communist Eastern Europe (Alonso et al., 2009; Bujok et al., 2015; Cassel & Pashkevich, 2011, 2014; Che, 2011; Iancu & Stoica, 2010; Jones & Munday, 2001; Kruczek & Kruczek, 2016; Tatar et al., 2008). In the global context whilst industrial heritage tourism “is gaining momentum in the developed world (where former industrial facilities are being reused, and therefore preserved, for leisure and tourism purposes”, its presence is now also beginning to be recognised in parts of the developing world or global South (Vargas-Sanchez, 2015). Outside of the global North there is a smaller cluster of research activity around industrial heritage tourism in developing countries (e.g. Otgaar et al., 2016). With its long mining history, recent experience of mine closures as well as de-industrialization, South Africa exhibits considerable potential for the growth of industrial heritage tourism. This theme has so far, however, been minimally explored within existing tourism scholarship about the country (Rogerson & Rogerson, 2011; Visser & Hoogendoorn, 2011; van der Merwe & Rogerson, 2013; Hoogendoorn & Rogerson, 2015; van der Merwe, 2016b; Visser, 2016). The practice and challenges of developing industrial heritage tourism for purposes of local economic development form the focus of this investigation.

TOURISM AND LOCAL ECONOMIC DEVELOPMENT IN SOUTH AFRICA: A PLACE FOR HERITAGE TOURISM

Following South Africa’s democratic transition in 1994 there emerged a consolidated research and policy focus around questions of local economic development (Nel & Rogerson, 2005, 2016a; Rogerson, 2014a). In one recent analysis, it was argued that the activity of local economic development represents “an explicitly social and territorial approach to development including not only economic aspects but also employment creation, poverty reduction, quality of life and environmental sustainability” (Hadjimichalis, 2017: 1). In South Africa, the importance of promoting local development “is increasingly being identified as the strategic enabler for national economic and development objectives” especially of the country’s National Development Plan (Department of Cooperative Governance, 2016). Since 1998 the planning of initiatives for Local Economic Development (LED) has been isolated as one of the core responsibilities of local governments across South Africa (Nel & Rogerson, 2005, 2016b; Nel et al., 2009; Rogerson & Rogerson, 2010). Arguably, in the first decade after democratic transition, much LED promotional activity in South Africa concentrated upon expanding the role of localities as centres of production whether of industry, agriculture or mining (Nel et al., 2009; Rogerson & Rogerson, 2010). Throughout the post-2000 period, however, there occurred a marked upturn in policy attention which is centred on the role of tourism as an alternative driver for LED in South Africa and of the making of ‘post-productivist’ places (Rogerson, 2002; Hoogendoorn & Visser, 2011; Irvine et al., 2016). The rise of policy interest around tourism as a strategic driver for local development is partly the result of the boost in the national importance of international tourism for South African economic development following the ending of global sanctions which dramatically limited foreign tourism arrivals in the country during the late apartheid period (Rogerson & Visser, 2004). In addition, the continued expansion of domestic tourism offered further opportunities for stimulating tourism-led LED in many parts of the country (Rogerson,

2015a). Finally, for many economically declining localities faced with the downturn of resource-based activities (particularly in mining and agriculture), tourism has become a 'last resort' for regenerating these marginalized areas (Nel & Rogerson, 2007; Rogerson, 2014b, 2015b). In a 2015, national survey of the local development activities across South Africa's 278 local governments it was revealed almost 80 percent of all the country's local authorities were engaged in various forms of activities to stimulate tourism as a major force for local economic improvement (Nel & Rogerson, 2016b). Of note is the special significance of tourism for catalysing economic development opportunities in South Africa's leading cities (Naicker & Rogerson, 2017; Rogerson, 2013; Rogerson & Rogerson, 2014a, 2017; Rogerson & Visser, 2007). The uneven success of these existing initiatives to boost tourism development has been highlighted in a stream of scholarly investigations over recent years (Binns & Nel, 2002; Butler & Rogerson, 2016; Ferreira, 2007; Hoogendoorn & Rogerson, 2015; Hoogendoorn & Visser, 2011; Irvine et al., 2016; Rogerson, 2002; Rogerson & Rogerson, 2011, 2014b).

One notable dimension of tourism-led LED planning across South Africa has been the growing attention to what would be regarded as niche forms of tourism. Many localities have sought to build their competitiveness for tourism development around specific niche types of tourism, including for example adventure activities, agritourism, bird watching, creative tourism, food, wine or youth festivals, fly fishing, sports events, voluntourism or weddings (see e.g. Booyens & Rogerson, 2015; Ferreira & Hunter, 2017; Hoogendoorn, 2014; Rogerson & Slater, 2014; Rogerson & Collins, 2015; Rogerson & Harmer, 2015; Rogerson & Wolfaardt, 2015). One additional highly significant niche for development in South Africa concerns the promotion of heritage and heritage tourism. Heritage was identified early in post-apartheid planning as an important segment for tourism promotion and diversification of product mix beyond the country's iconic nature tourism attractions (Masilo & van der Merwe, 2016; van der Merwe, 2016a, 2016b).

In contemporary South Africa, there is marked recognition of the potential for developing the country's heritage tourism economy (Galla, 1998; van der Merwe, 2016b). During the mid-1990s the Department of Environmental Affairs and Tourism (DEAT) acknowledged the potential for tourism in South Africa's development. The Department of Arts and Culture (DAC) recognised the importance of heritage for national economic development promotion (Republic of South Africa [RSA], 1996). Only recently, however, has the specific potential of heritage tourism been acknowledged as meeting the strategic goals of the 2011 National Tourism Sector Strategy (RSA, 2012a). Arguably, critical recognition of the national importance of heritage tourism for South Africa is evidenced most clearly by the preparation and launch in 2013 by the National Department of Tourism (NDT) of its *National Heritage and Cultural Tourism Strategy (NHCTS)* (RSA, 2012b). In the NHCTS, it is stated explicitly that the country wishes "to realise the global competitiveness of the South African heritage and cultural resources through product development for sustainable tourism and economic development" (RSA, 2012b: 10). The central objective of this strategy is to give strategic direction for the development and promotion of heritage and cultural tourism in South Africa, and furnish a framework for the coordination and integration of heritage and culture into mainstream tourism (van der Merwe, 2016b).

It is observed that recognition of the significance of heritage tourism extends across the different tiers of government in South Africa from national to provincial to local. At the local scale of government, it is striking that several South African cities and small towns sought to capitalise on aspects of heritage tourism as components of strategies for tourism development, and of broader local economic development planning (Rogerson & Visser,

2007; Rogerson, 2013, 2016; van der Merwe & Rogerson, 2013; Rogerson & van der Merwe, 2016; van der Merwe, 2013, 2014, 2016b). This said, the developmental challenges of heritage tourism so far occupy only a minor position in the growing academic literature on tourism in South Africa (Rogerson & Rogerson, 2011; Visser, 2016; van der Merwe, 2016b). Existing studies mainly focus on how to repackage heritage for tourism development in South Africa (Shackley, 2001; Magnussen & Visser, 2003; Witz et al., 2005; Marschall, 2006, 2010); the experience and impacts of heritage tourism projects in the country's cities (Marschall, 2012; van der Merwe, 2013); public-private partnerships in heritage projects (Rogerson, 2016), tourist perceptions of heritage sites (Khumalo et al., 2014; Masilo & van der Merwe, 2016; van der Merwe, 2016a, 2016b); and, the opportunities for developing heritage tourism routes in peripheral areas (Bialostocka, 2014). It is against this backdrop that the objective in this article is to analyse the challenges that confront local heritage tourism development in South Africa through investigating one case study of industrial heritage tourism. The evidence and experience of heritage tourism development at the diamond-mining village of Cullinan contributes to international scholarship on industrial heritage tourism. The material examines the re-use of mining heritage around the diamond-mining village of Cullinan, which is now part of the Tshwane Metropolitan area of Gauteng province, the economic heartland of South Africa.

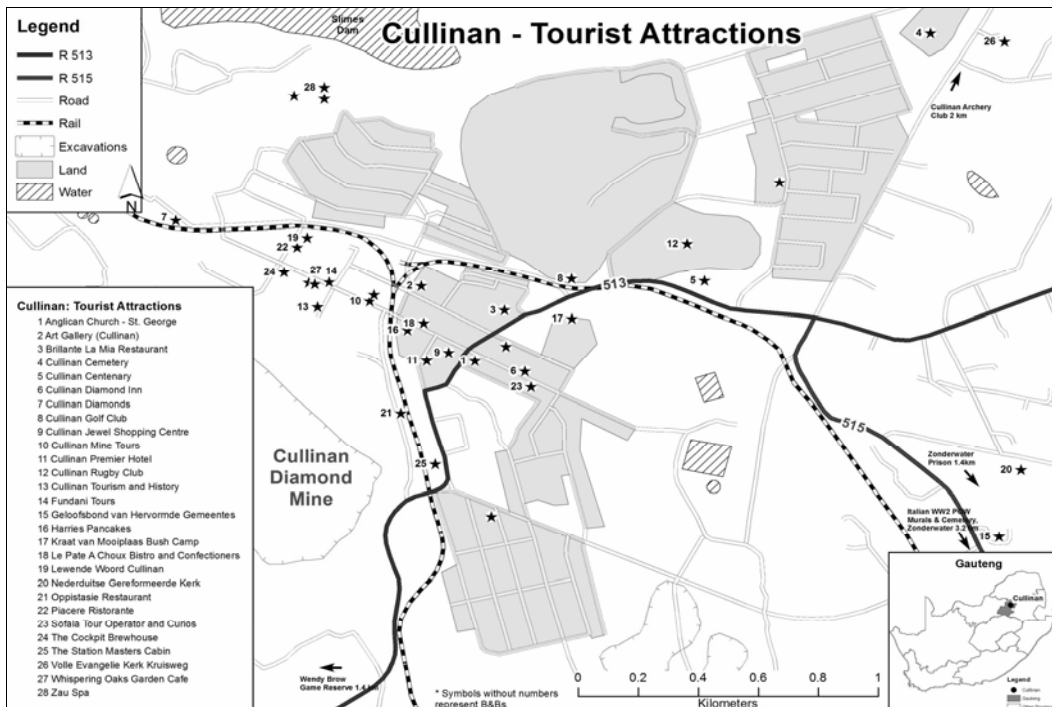
RESEARCH METHODS

The analysis draws upon a combination of a number of different sources and research methods. Policy documents from the provincial and local government are scrutinised for the context of local economic development. Data on visitor numbers to the mining heritage site was obtained from the mine owners. The research draws critically upon primary interviews with heritage tourists and local heritage stakeholders, including local accommodation providers and guides. Field research was undertaken to profile and characterise visitors to the Cullinan Diamond Mine using demographic indicators to understand the heritage tourism market and explore tourist perceptions of industrial heritage and heritage tourism. Through an examination of the interplay between various public and private sector role-players and stakeholders associated with the specific heritage site the local impacts on tourism of the heritage site were analysed. The study also uses data on local tourism extracted from a national database termed the IHS Global Insight Regional eXplorer. This database includes tourism and provides "accurate and up-to-date economic, marketing and development information for each magisterial district and province in South Africa" (IHS Global Insight, 2015).

INDUSTRIAL HERITAGE TOURISM AT CULLINAN

Cullinan is a small town situated 30km east of Pretoria, South Africa's national capital and 107km northeast of Johannesburg, the country's major commercial centre. This 'mining village' forms part of Dinokeng ("a place of rivers"), a region in north-eastern Gauteng province. From the humble beginnings of a farm (Elandsfontein) which belonged to the Minnaar family in 1859, it grew into a diamond-mining village from the early 1900s. Cullinan is renowned for the Kimberlite that makes up the diamond-bearing rock in the area (Lincoln, n.d). The Cullinan diamond pipe is one of the oldest diamond pipes in the world. Mining commenced in 1903. Under the ownership of Sir Thomas Major Cullinan, prospecting pits were dug on the site of the mine. According to legend Cullinan is said to have "promised his wife (Lady Cullinan) that one day he would bring her the biggest diamond in the World" (Lincoln, no date: 15). In 1905, the Cullinan Diamond was discovered by the surface manager of Premier Diamond Company and named after its

owner. The Cullinan Diamond weighed $3024\frac{3}{4}$ South African carats, equivalent to 3106 metric carats, and was 4 by $2\frac{1}{2}$ by 2 inches in size (Lincoln, no date). The colonial Transvaal government, which had bought the stone from Sir Cullinan, presented it to King Edward VII of England for his 66th birthday. Much of the Cullinan diamond makes up the British Crown Jewels and now is housed at the Tower of London on display for tourists to view. Following its discovery, the settlement of Cullinan experienced a chequered history with the mine closing during the period of World War I, subsequently re-opening, experiencing the ravages of a Spanish Flu epidemic and further economic despair when the mine closed once again in 1932 because of the Great Depression. Diamond mining continued at Cullinan under the ownership of De Beers and the mine has yielded other significant stones which have given the village an international reputation especially for rare blue diamonds. The life of the mine is anticipated to last until 2030. The Cullinan Diamond mine (previously known as the Premier (Transvaal) Mining Company) owns much of the land in Cullinan and continues the heritage of diamond exploration and discovery. The town of Cullinan retains a late-Victorian identity and today it is a tourist and mining town. In 1992 based on an initiative of De Beers, underground tours began at the mine site. The Friends of the Rail (a private train company) operate monthly train trips by steam train to Cullinan from Pretoria station. The train offers a popular outing bringing hundreds of visitors to Cullinan each month.



Alongside its heritage of mining, Cullinan (Figure 1) offers many attractions to potential visitors. These include the town's many boutiques, antique stores, art galleries, a theatre, and a range of shops and restaurants along the main road (Oak Avenue), which leads to Cullinan Diamond mine. Among the heritage and cultural attractions of interest

in the town are surface or below-ground diamond mine tours; a village tractor-driving tour; the St George's Anglican Church (built in 1908 and designed by Sir Herbert Baker); murals painted by Italian Prisoners of war (during World War II); the Mc Hardy House Museum; and, the Cullinan Station. Cullinan also offers nearby game ranches; outdoor sports and adventure tourism (abseiling, horse-riding and zip-lining activities); as well as hosting the Groot Gat Festival in March which comprises live shows, music, street parades, a large variety of food stalls, entertainment, a beer garden and many exhibitions. In May, the Mampoer (a traditional Afrikaans spirit akin to moonshine) Festival is hosted at Rayton (9,5km away from Cullinan) to celebrate Afrikaans heritage. At the core of tourism is, however, mining heritage tourism and a range of above ground and below ground tours of the operational mine (Figure 2).



Figure 2. Walking tour of The Cullinan Diamond Mine
(Source: Photograph by Clinton D. van der Merwe)

RESULTS AND INTERPREATION

The importance of tourism and of tourism promotion for Cullinan is evidenced by policy documents, which are produced by local and provincial tourism bodies. The Gauteng province's tourism vision for 2014 and beyond speaks of Cullinan as part of "the 240 000 hectare Dinokeng 'Africa in one day' destination. The Gauteng Development Strategy, however, makes no mention to either heritage or heritage tourism. Although the local Integrated Development Plan acknowledges the potential of tourism in the area related to the history of Cullinan it accords minimal attention to heritage and fails to indicate how industrial heritage could be tapped to grow the local economy (City of Tshwane, 2014).

Figure 3 shows the estimated number of tourist trips to Cullinan for different purposes over the period 2001 to 2015. The data on leisure trips reveals the uneven performance of Cullinan as it shows a modest increase in the number of tourism trips for leisure purposes over the 15-year period since 2001, with a downturn recorded after 2010. The picture in terms of business tourism is very weak with only limited growth from 2001 to 2013, and then a steady decline to 2015. The pattern of Visiting Friends and Relatives (VFR) is much less significant than leisure visits in Cullinan. Because of these local tourism

trends, tourism spending in Cullinan has become, in relative terms, of reduced significance to the regional economy. This is demonstrated on Table 1. The data indicates that in a period when South Africa as a whole has considerably been boosting the contribution of tourism to the national economy, in the case of Cullinan, tourism spend as a proportion of local Gross Domestic Product (GDP) exhibits signs of decline, particularly from 2001.

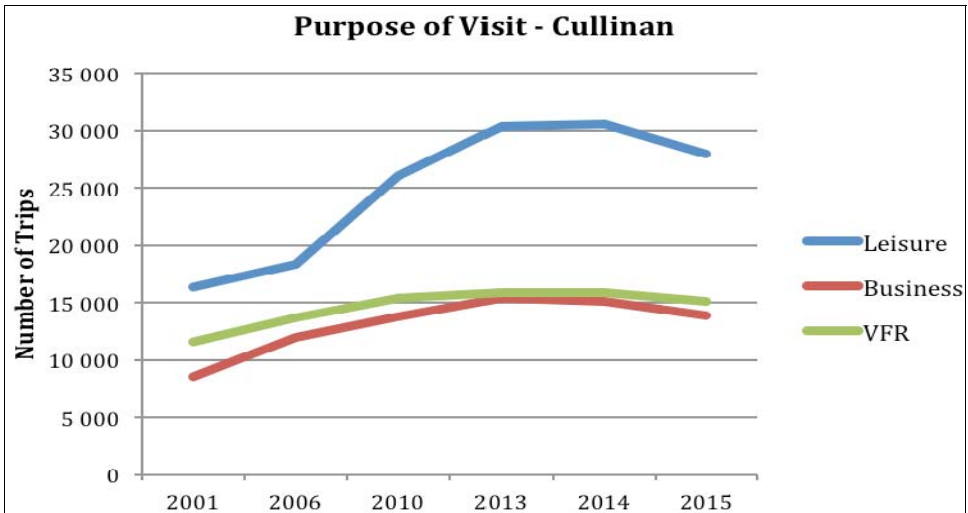


Figure 3. Number of Tourist trips to Cullinan (Region 5) from 2001-2015
(Source: Unpublished IHS Global Insight data)

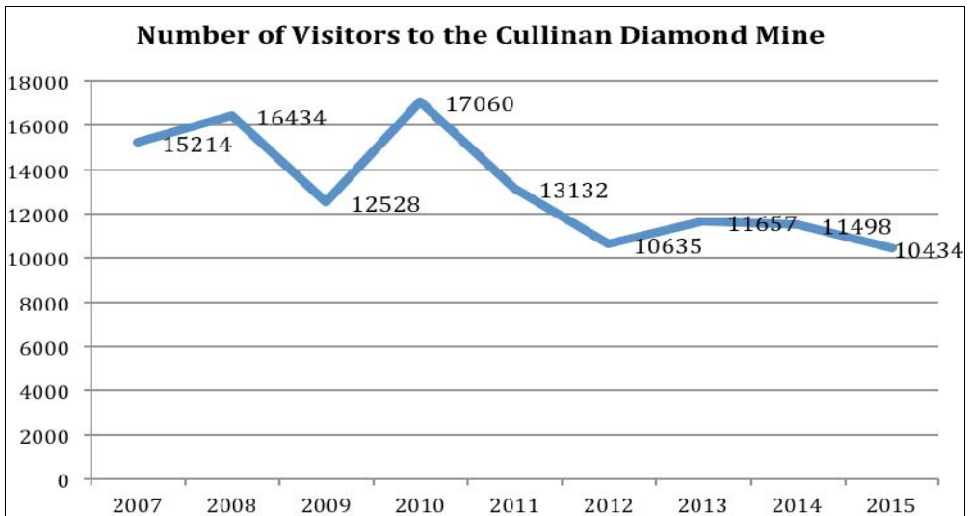


Figure 4. Visitor numbers to the Cullinan Mine from 2007-2015
(Source: Cullinan Diamonds Marketing Department, 2016)

The profile of visitor numbers and patterns of stay of visitors to Cullinan points to the limited impacts of new heritage tourism projects upon the local tourism economy. Figure 4 records the trend of visitor numbers to Cullinan Diamond Mine from 2007 to 2015. It is evident that visitor numbers have decreased with the exception of 2010, the

year of South Africa's hosting of the FIFA Soccer World Cup. It is important to acknowledge that these visitor numbers include day visitors as well as tourists who stay at least one night in Cullinan. The net revenue accruing to the local economy from day visitors is obviously much less in local spend than for tourists who stay overnight.

Table 1. Cullinan: Contribution of Tourism to Local Economy, 2001-2015
(Source: Unpublished Global Insight Data, 2015)

	Total Tourism Spend (R1000) Current Prices	Total Tourism Spend as % of Local GDP
2001	267 351	17.3
2006	445 956	15.6
2010	590 410	13.4
2013	801 788	13.8
2014	899 876	14.1
2015	867 193	13.0

Interviews with local stakeholders in tourism as well as accommodation owners confirms this situation and points to the need to encourage attracting heritage tourists to Cullinan who stay in the town for two to three nights, so as to enjoy other cultural and heritage attractions and increase tourism expenditure in the town. In explaining the poor record of tourism, stakeholders argued as follows: *"There is not enough advertising for our town... and tourism business is slow... we should be part of a massive advertising strategy for small towns that fall just outside of the Metropolitan area. Cullinan has a poor budget and underdeveloped infrastructure for tourism"*. Eight local accommodation providers in Cullinan were surveyed. It was estimated by these establishments that heritage visitors comprised at most 25 percent of their overnight stays; the largest share of tourists were in Cullinan for business or conferencing purposes.

Table 2. Socio-demographics of cultural and heritage tourists at Cullinan

Individual Characteristics	Cullinan
Gender	
Male	46.9%
Female	53.1%
Race	
African	4.2%
Coloured	4.2%
White	85.4%
Indian	2.1%
Other	4.1%
Age	
20 years old or less	2%
21-30	8.2%
31-40	16.3%
41-60	32.4%
Over 60	41.1%
Highest Level of Education	
Primary Education	6.3%
High School Education	14.6%
Post High School Education	79.1%

The results of the visitor survey reveal the characteristics of heritage tourists who visit Cullinan (Table 2). It is disclosed that most visitors to Cullinan were domestic

visitors, whites, over 60 years of age and well-educated. In total 40.8% of survey respondents at Cullinan indicated that heritage was ‘very important’ to them and more than half of respondents defined heritage as “a part of our history that needs to be preserved for future generations”.

A significant finding in terms of local economic development was that only 43% of visitors to Cullinan stayed over in the town for one-night; the remainder were ‘simply passing through’ choosing to visit the industrial heritage site on a day trip. Moreover, of the group of tourists who stayed over, it was recorded that 39% of respondents stayed with friends and relatives whilst in Cullinan. This finding has significant implications for tourism spend as well as for the local accommodation sector in Cullinan and indicates the weak state of the local tourism economy in the town.

In terms of the stakeholder interviews, most respondents were highly critical of the role of local government in its minimal tourism promotion. It was argued that the local municipality spends only limited funds for the promotion of tourism in Cullinan. Of particular concern were highlighted recent cuts in budget allocations for tourism marketing. One local tourist guide argued that “*the private-sector has had to take on the marketing and promotion of tourism in Cullinan; we simply don’t get the support from the local tourism authorities*”. Further, local tourism stakeholders in Cullinan also expressed a lack of confidence and trust in the local and provincial authorities with respect to the management and maintenance of tourism. Among the highlighted shortcomings were a lack of strategic direction; duplication and wastage of resources; poor budgeting; poor or non-existent marketing strategies; and, lack of capacity. This litany of problems appears to confirm more broadly the capacity shortcomings of many local governments in South Africa with respect to tourism planning, management and development (van der Merwe, 2016b). The local municipality is thus typical of most local governments across South Africa which struggle with the multiple challenges in planning for sustainable tourism development (van der Merwe & Rogerson, 2013).

Table 3. Attributes of importance to heritage tourists, ranked on a Likert Scale, in percentages at Cullinan

Attribute	Excellent	Very Good	Good	Fair	Poor
Signage within the Site	10.9	26.1	39.1	13.0	10.9
Parking	11.1	26.7	40.0	15.6	6.6
Safety	16.3	40.8	22.4	18.4	2.1
Food	21.3	31.9	34.0	12.8	0
Service Amenities (Toilets)	8.7	15.2	52.2	13.0	10.9
Staff Friendliness & Courtesy	25.5	23.4	34.0	14.9	2.2
Quality & Accuracy of the Information Presented	21.3	31.9	31.9	10.6	4.3
Guide’s Knowledge & Abilities	24.4	22.0	43.9	4.9	4.8
Variety of Activities or Range of Information Provided	14.9	21.3	40.4	19.1	4.3
Marketing & Publicity of the Site	11.1	13.3	40.0	20.0	15.6
Disabled Access	9.1	15.9	25.0	22.7	27.3
General maintenance and cleanliness of the site	14.3	36.7	28.6	12.2	8.2

The visitor survey offers an analysis on the perceptions of amenities in Cullinan and of the mining heritage site. Table 3 shows the majority of visitors/tourists were satisfied with the tour experience. Positive issues that emerged were of sufficient parking and of adequate safety and security to ensure visitor comfort and wellbeing throughout the visit. Most respondents complimented the staff on their friendliness and high levels of professionalism. Many interviewees (35.6%) indicated, however, that Cullinan needs to be better promoted and more extensively marketed as a tourist destination (van der Merwe, 2016b).

CONCLUSION

Industrial heritage tourism is emerging as a distinctive sub-field of heritage tourism scholarship (Vargas-Sanchez, 2015). The global South is under-represented in industrial heritage research and it is this knowledge gap that the present paper has made an original contribution. South Africa is a relatively recent entrant within the international heritage tourism economy. Arguably, heritage tourism has the potential to become an important driver for tourism growth and economic development in South Africa (van der Merwe, 2016b). Opportunities exist for growing the segment of industrial heritage tourism as exemplified by the Cullinan case study. This said, the results of this investigation underline that the local tourism economy is under-performing in terms of attracting heritage tourists; instead the town is viewed as mainly a countryside escape for day trippers from Pretoria or Johannesburg. Notwithstanding Cullinan's rich cultural and industrial heritage assets, the evidence points to a tourism economy that is in a state of stagnation. In order to maximise and leverage the opportunities of heritage tourism for local economic development it is evident that a number of challenges be confronted. The capacity shortcomings of local governments in South Africa must be addressed in terms of local economic development planning in general and planning for tourism-led development in particular. The analysis of Cullinan highlights shortcomings in tourism marketing, poor budgeting, lack of leadership, and little or no strategic planning for tourism. As a whole, these issues confirm more broadly the capacity shortcomings of many local governments in South Africa with respect to tourism development, planning and management. In the final analysis, it is stressed that these capacity constraints at the level of local government must be tackled if the potential of industrial heritage tourism in South Africa is to be maximised for the future benefit of local economies (van der Merwe, 2016b).

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