





Close Out Report
March 2012







Department of Economic

Development and Tourism

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KWAZULU-NATAL PROVINCIAL GOVERNMENT

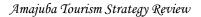






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EXECUTIVE SUMMARY

The purpose of this report is to review the 2004 tourism strategy for Amajuba District Municipality. The strategy is 8 years old and is thus outdated, furthermore, legislation, policy and strategy has changed substantially over the last two years with the implementation of new national and provincial sector plans for tourism. The purpose of this review is to update the strategy, and to align the strategy to these new sector plans.

The report contains both primary, desktop research, and secondary research. A complete review of national legislation, national and provincial tourism sector plans, district and local municipality plans has been conducted.

- ✓ Statistics have been acquired from a variety of sources including an online survey of service providers, Tourism KZN, South African Tourism, KZN Wildlife, the Department of Arts and Culture (Museums), Battlefields Guides Association, attractions across Amajuba, as well as various tourism papers released by TKZN and dti.
- ✓ Extensive one on one consultation has been conducted with private and public stakeholders including tourism service providers and product owners, curators, department officials, LED and tourism officers and managers, sports clubs and marketing persons.
- ✓ Site visits were conducted where officials from each of the local municipalities as well as private stakeholders were met with. Tours of Emadlangeni and Dannhauser were conducted.

The situational analysis is a culmination of these interviews, site visits, statistics, and research papers. The following challenges and opportunities serve to summarize the situational analysis.

Opportunities:

- Economic status of Newcastle within KZN and central location between KZN, Freestate and Gauteng leads to:
 - ➤ High volume of business visitors
 - ➤ High volume of visitors to events (sporting, cultural and other)
- Current level of expertise, infrastructure and natural assets allow for the exploitation of niche markets:
 - > Arts and Culture tourism (including music)
 - Sports tourism
 - Heritage and Battlefields tourism
 - > Avi-tourism
 - Adventure tourism (in the scenic mountains)
- Construction of Vulintaba, a prestigious lifestyle resort, in the Drakensberg Foothills could be the major draw card required in Amajuba.
- Upgrade of the N11 and Newcastle airport will lead to increased connectivity.
- Active and interested community with strong District Tourism Forum

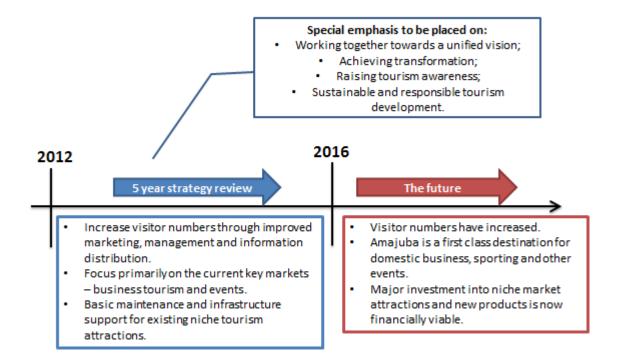
Challenges:





- Tourism information centres in Newcastle and throughout the district are lacking.
- Roads are currently in a bad state major construction on N11, R34 in disrepair and D96 not tarred. Furthermore, majority of the traffic bypasses Newcastle due to placement of the N3.
- Site maintenance and upgrades are necessary for almost all niche attractions, and nature reserves.
- Lack of dedicated staff in Dannhauser and Emadlangeni Municipality to manage tourism, lack of CTO in Newcastle LM.
- Lack of comprehensive marketing and promotion strategy:
 - Poor image of Newcastle and lack of knowledge about Dannhauser and Emadlangeni
 - Poor and declining demand for niche attractions
- Exclusion of Dannhauser and Emadlangeni, as well as SMMEs (due to low demand

Based on the finding of the situational analysis the following strategic approach was developed. This strategic approach makes creating demand a priority, over new product development.



The vision was created and workshopped based on the above strategic approach. The vision is a result of the views of the community and stakeholders, as well as the statistical findings of the situational analysis.

'It is our vision that, in 5 years, the number of visitors to Amajuba will have increased tenfold. This will be achieved through effective tourism management, marketing and information distribution.

Amajuba will become a first class destination for meetings, conferences and events by building further on the strengths of the existing tourism market.





A variety of quality heritage, arts & culture, and nature based tourism products will attract niche markets, business men, and visiting friends and relatives.

It is our vision that the public and private tourism role players will work together to realise this vision which will benefit the whole area and community, and that transformation will take place.

Increased tourism awareness will lead to community and political buy-in and everyone will be involved in growing a responsible and sustainable tourism industry in Amajuba.'

Four strategic clusters based on the tourism master plan were developed, each with three strategic thrusts and up to 15 projects for each strategic thrust. These were taken to a district workshop at which attendees were asked to edit and prioritise projects according to which they thought were most urgent and important for tourism in Amajuba. Attendees were asked to choose 5 projects per strategic cluster. The projects chosen in the workshop acted as a guide for the prioritization of projects. The following criteria were considered at the workshop, and afterwards, when choosing priority projects.

- Criterion 1: economic impact and strategic importance for the tourism sector
- Criterion 2: skills development and employment creation
- Criterion 3: industry transformation and SMME development/support
- Criterion 4: led and potential anchor projects

Based on these criteria, the following 20 projects were established as priority projects:

Strategic Cluster 1) Marketing – tourism growth & development (demand)

- Develop tourism packages and incentives targeted at businesses, schools, sports associations and clubs.
- Promote MICE venues and packages in businesses and government in and outside of Amajuba.
- ➤ 1.2.1) Relocate and refurbish the tourism info centre in Newcastle and Utrecht, with satellite stations at waterside Wimpy and shopping malls.
- ➤ 1.2.3) Contract web designers to design and maintain an Amajuba Experience type website, and similarly to develop and maintain current municipal websites. Launch a social media marketing program.
- ➤ 1.3.1) Create and develop a new, unique brand for Amajuba.

Strategic Cluster 2) Product Development and Planning

- ➤ 2.1.2) Establish a district events calendar procurement/funding strategy in order to manage and co-ordinate events.
- ➤ 2.2.3) Heritage: Implement findings of the SiVest 2005 Battlefields infrastructure upgrade plan, including maintenance agreement. Solve access problems surrounding land ownership.
- > 2.2.12) Amajuba dams revitilisation project.





- ➤ 2.3.3) Arts&Culture: Relocate and expand Carnegie Art Gallery premises.
- ➤ 2.4.2) Lobby for grants from provincial treasury for upgrade of Newcastle Airport, in conjunction with LED and Newcastle LM.

Strategic Cluster 3) People in tourism

- ➤ 3.1.1) Improve access to tourism products for accessibility challenged visitors.
- ➤ 3.1.2) Identify one national tourism grading standard, conduct grading of all service providers to obtain baseline, provide guidelines, and monitor yearly improvements.
- ➤ 3.2.3) Ensure ongoing business support for SMMEs
- > 3.2.7) Establish permanent crafters stalls at tourism nodes/sites and make provision for crafters at events, as well as establishing regular crafting events.
- ➤ 3.3.3) Develop programs to improve tourism awareness & understanding amongst learners, students, the media and communities.

Strategic Cluster 4) Policy, strategy, governance, research & knowledge management monitoring & evaluation

- ➤ 4.1.1) Increase local municipality tourism budgets significantly, and review the district tourism budget and lobby for a dedicated tourism official at Dannhauser and Utrecht local municipalities.
- ➤ 4.1.2) Establish CTO's in Dannhauser, Utrecht and Newcastle local municipalities.
- ➤ 4.1.7) Review tourism by-laws at all three local municipalities and form a district framework.
- ➤ 4.2.2) Conduct research in order to understand Amajuba's current tourism market segments, and the economic impact of all tourism products, including events.
- ➤ 4.3.1) Ensure that green principles are incorporated into tourism developments through providing incentives and creating awareness.

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SECTION 1: INTRODUCTION

PURPOSE

The purpose of this report is to review the 2004 tourism strategy for Amajuba District Municipality. The strategy is 8 years old and is thus outdated, furthermore, legislation and policy has changed substantially over the last two years with the implementation of new national and provincial sector plans for tourism. The purpose of this review is to update the strategy, and to align the strategy to these new sector plans.

METHODOLOGY AND APPROACH

Phase one includes the contextual analysis (a review of national, provincial and local policy and plans), and a situational analysis (analysis of the current tourism system in Amajuba) which ends with a SWOT analysis. The SWOT analysis highlights the strengths, weaknesses, opportunities and threats as determined in the situational analysis. The second phase of the review is the strategy report which outlines a vision, strategies and recommended projects to improve tourism in Amajuba. The third phase of the review is an implementation plan which provides a framework within which the projects should be implemented. This includes timeframes, key performance indicators and an institutional structure. The implementation plan also includes mini business plans for 5 chosen priority projects.

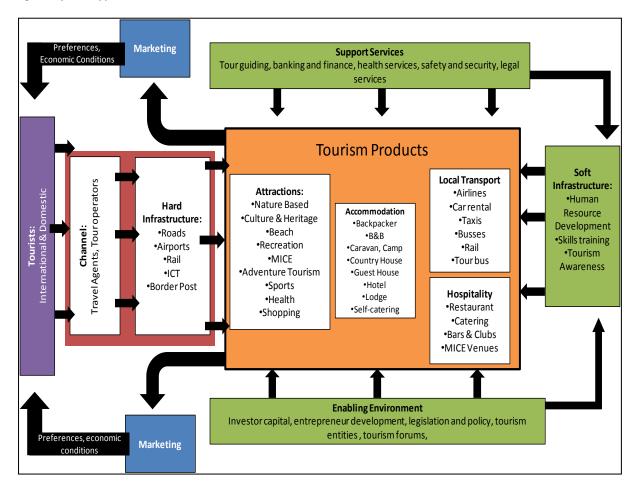
The report contains both primary, desktop research, and secondary research. A complete review of national legislation, national and provincial tourism sector plans, district and local municipality plans has been conducted. Statistics have been acquired from a variety of sources including Tourism KZN, South African Tourism, KZN Wildlife, the Department of Arts and Culture (Museums), as well as various tourism papers released by TKZN and dti. Extensive one on one consultation has been conducted with private and public stakeholders including tourism service providers and product owners, curators, department officials, LED and tourism officers and managers, sports clubs and marketing persons. A site visit was conducted over two days where officials from each of the local municipalities as well as private stakeholders were met with. The situational analysis is a culmination of these interviews, site visits, statistics, and research papers.

In order to include every aspect, the following systems approach was applied when developing the strategy. The diagram reflects that tourism is not merely a grouping of products and attractions, but rather a network including marketing, governance, human resource, support services, transport services, and infrastructure, without which, the products and attractions would fail to function. When formulating the situational analysis report and then the projects, this all-encompassing approach is used.





Figure 1 Systems approach to tourism



Source: Urban-Econ Tourism

STRUCTURE OF THE REPORT

The first section of this report is a contextual analysis which outlines the legislative and policy context within which this report is developed. The second section is the situational analysis which describes the status quo of tourism in the area. The third section is the strategy formulation which identifies strategies and projects. The final section is the implementation plan which descrives how these projects should be implemented and provides details on the priority projects. Therefore, the report structure is as follows:

Section 1: Introduction

Section 2: Contextual Analysis

Section 3: Situational Analysis

Section 4: Strategy Formulation

Section 5: Implementation Plan





SECTION 2: CONTEXTUAL ANALYSIS

This regional contextual analysis is a review of national plans (such as the national growth path), provincial plans (such as the provincial growth and development strategy), district plans (such as the Amajuba IDP), and local municipality plans (IDPs for each of the LMs). The review also includes a brief review of the recently released National Tourism Sector Strategy and Provincial Tourism Master Plan (KZN). It is important to understand Amajuba's Tourism sector within the context of these broader plans and, more importantly, to align the strategy to these plans.

NATIONAL AND PROVINCIAL POLICY AND STRATEGIES

New Growth Path

The New Growth Path strategy focusses primarily on job creation. It cites social dialogue and solidarity as central to change. It also has a strong focus on inclusive and shared growth in a hope to target inequality. The Amajuba Tourism Strategy must focus on inclusive tourism projects that are spatially diverse in order to align itself with the New Growth Path. Projects that allow for maximum employment gains must take priority.

National Planning Commission's National Development Plan

The National Development Plan aims to create a new story where South Africans embark on a journey towards equality. In 2030 South Africa will be a socially integrated, safe, sustainable place to live for all South African's. The economy will be productive due to increased exports, capital investment and savings; and will have created 11million jobs. Tourism will play a key role in increasing exports. Importantly, tourism is an industry that is able to increase growth and employment simultaneously. By boosting Amajuba's investment in tourism SMMEs and attracting international tourists, Amajuba is aligning itself to the National Development Plan. Regional tourism packages can be offered to boost foreign interest, and rural economies will be activated through tourism investments.

Provincial Growth and Development Strategy

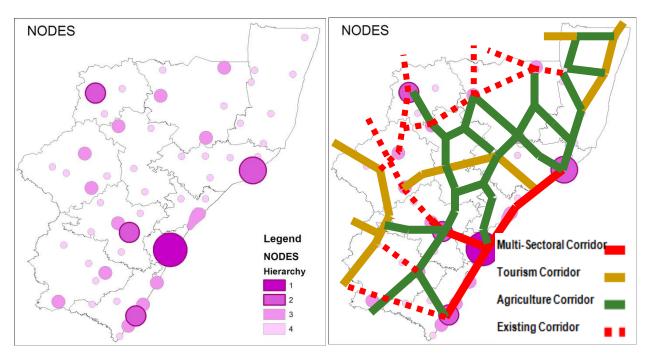
The PGDS for KwaZulu-Natal aims to maximize its position as a GATEWAY to South and Southern Africa, as well as its human and natural resources in order to create a safe, healthy and sustainable living environment. Tourism has been established as priority sector in the province for both conservation and as a driver for investment. Tourism's ability to convert rural and protected land that would otherwise have almost no economic value into a thriving industry is not underestimated. Objective 3.6.2 speaks of developing industry-orientated arts and culture programs in order to increase social cohesion.





Provincial Spatial Economic Development Framework

The PSEDF outlines the spatial priorities and uses in KZN. The spatial framework is outdated (2006) and is in the process of being reviewed. The following map indicates that Newcastle is a secondary node which means that it is an urban centre with good existing economic development and the potential for growth that services the regional economy. Tourism is considered a category of potential for Newcastle. Dannhauser and Utrecht are considered Quaternary Nodes which is a centre which should provide services to the localised economy. Newcastle falls on an existing economic corridor which runs through Amajuba, but not through Dannhauser and Utrecht. Amajuba also falls on an agricultural corridor, but it does not fall on a tourism corridor which means that tourism is not the primary activity in that area. The closest tourism corridors fall into Uthukela district. This again emphasizes the importance of linking with uThukela.



Niche Tourism

Niche tourism is an important tourism segment for Amajuba, considering that Amajuba cannot compete in the traditional markets of big five game reserves, Drakensberg and beaches. The dti recognised the important role that niche tourism can play in this regard, and has included niche tourism development as a key tourism project in the dti's Industrial Policy Action Plan 2010/11 – 2012/13. The development of niche tourism sectors holds a number of benefits, including¹:

- the opportunity to diversify the tourism economy via the creation of new markets;
- generate higher yields per visitor, in terms of foreign exchange earnings and consumer spending, even though niche markets are often smaller in size than mainstream tourism markets;

¹ Department of Trade and Industry, 2010, 'The dti Niche tourism markets: Avi-Tourism in South Africa





- generally provide greater growth potential than mainstream tourism;
- significant developmental impacts, often stimulating the creation of quality jobs that require specialized skills, as opposed to the low or semiskilled jobs generally associated with mainstream tourism;
- niche tourism activities, which are often community-based and located outside of traditional tourist areas, thereby encouraging the geographic distribution of tourism benefits;
- and increased local spending, as niche tourism offerings attract independent travellers, as opposed to pre-paid package tourists.

Some niche tourism products include avi-tourism, business tourism, agri-tourism, heritage tourism, arts tourism, educational tourism and geological tourism.

Investment and Promotion

Investment projects are an important part of tourism due their ability to drive growth and employment. In any investment location is important, as well as the markets (international and national). Investment projects must have a multiplier effects for economic opportunities and high impact on the region in terms of infrastructure, sustainable employment created as well as a direct benefit to the local communities.

Projects identified that have the potential to attract investment in Amajuba include resort development (Vulintaba). Vulintaba will significantly impact on Amajuba's infrastructure and employment. It is important that throughout the strategy, further opportunities for tourism investment are identified and taken advantage of.

NATIONAL AND PROVINCIAL TOURISM STRATEGIES

NATIONAL TOURISM SECTOR STRATEGY

The National Tourism Sector Strategy (NTSS) was developed throughout 2010 and adopted by cabinet in 2011. It is closely aligned to national policy, particularly, the New Growth Path which guides all development in South Africa. The strategy focusses on making South Africa a world class tourism destination while being inclusive and improving local economic development.

Vision: To be a Top 20 tourism destination in the world by 2020

The strategic objectives of the NTSS were developed around the following themes:

- ✓ Theme 1: Tourism growth and the economy this includes increasing tourisms contribution to national and regional GDP, as well as increasing employment in the sector
- ✓ Theme 2: Visitor experience and the brand this includes positioning South Africa as a globally recognized brand with world class visitor experiences as well as enhancing the tourism culture amongst South Africans.
- ✓ Theme 3: Sustainability and good governance this theme revolves around integration and sustainability in local economic development.





The role of local government in implementing the NTSS: Local authorities must make decisions about and set directions for, promoting the social, cultural, environmental and economic well-being of their communities. Their role in the tourism sector is to manage assets such as public land, and to provide important infrastructure. They also represent host communities.

The following table describes the targets set for tourism in South Africa in the NTSS.

Table 1 NTSS Targets

Focus	Measure	Baseline (2009)	2015		2020
GDP	Industry (direct impact)	R71,4 bn (3% of GDP)	R118,4 bn	R188 of GD	bn (2,9% P)
	Economy (direct and indirect impact)	R189,4 bn (7,9% of GDP)	R318,16 bn	R499	bn
Visitor Arrivals	Foreign	ign 9933966 2068030 1500		15000	0000
	Domestic	14600000	16000000	18000	0000
	Trips	30.3m	40m	54m	
Employment	Direct	389 100	403 900	461 7	00
	Direct and Indirect	919 800	968 300	1 097	000
Investment	Public	R82,4 bn	R100 bn	R118	bn
	Private	no baseline data			
	Foreign Direct	R3 bn	R3.8 bn	R4 bn	
Transformation	No of companies with a BEE scorecard	no baseline data			
	No of companies with high level accreditation	no baseline data			
	Number of companies reaching tourism charter targets	no baseline data			nce
	Number of black majority owned companies	no baseline data			
Rural Tourism demand	Number of visitors to rural businesses:	no baseline data			
	Number of attractions in rural areas:	no baseline data			
Number of bed nights in low	Foreign	15.80%	21.10%		25%
season months	Domestic	5.30%	7.10%		10%
Visitor Experience	Number of visitors whose experience meets or exceeds their expectations	no baseline data			
Awareness	increased levels of awareness of tourism and its value	no baseline data			





Increase in levels of community participation	no baseline data	
′' '		

KZN TOURISM MASTER PLAN

The KZN TMP was finalized in 2011 and has 4 high level strategies:

- Marketing (marketing the experience, not the location, and measuring each marketing project by the number of visitors it attracts)
- **Product development and planning** (focus on beaches, wildlife, scenic and then heritage as a support enterprise with special mention of niche product as mentioned below)
- **People in Tourism** (human resource development, transformation, creating standards of excellence in the industry, and making tourism a priority in the minds of all KZNers)
- Policy, strategy, governance, research & knowledge management monitoring & evaluation

Relevance to Amajuba: Niche Tourism. The strategic thrusts under niche tourism are:

- BUSINESS, SPORT AND EVENTS TOURISM STRATEGY (AMAJUBA!)
- Other niche strategies
 - o Heritage niches
 - Adventure
 - o Rail
 - o Health
 - Pink tourism
- Future niches
 - o Green tourism
 - o Geological
 - Paleontological

- Avi-tourism

- Diving

- Hunting

- Shopping

- Agri-tourism

The following table describes the targets given in the Master Plan.

Table 2 KZN tourism master plan targets

Objectives	Measure	2009 (or 2010) Baseline	2020 Target	2030 Target
GDP	Direct GDP impact	R22bn	R65,2bn (R40,4bn 2009 Rands)	
	Indirect GDP impact	R33bn	R98,4bn (R60,66bn 2009 Rands)	
Foreign tourists	Total visitors	1 213 001	2 095 410	3,45 million
	International day visitors	350 541	657 584	1,15 million
	Foreign tourists	862 460	1 437 826	2,33 million
	Inter-continental	348 434	482 724	650 000



	tourists			
	African Tourists	514 026	955 102	1,68 million
Domestic Tourists	Total domestic tourists	8 800 000	16 301 935	24,17 million
	Domestic holiday tourists	3 168 000	7 128 000	10,85 million
	Domestic non- holiday tourists	5 632 000	9 173 935	13,32 million
Employment	Direct jobs supported by the sector	100 000	183 820	
	Direct and indirect	133 000	244 480	
Durban is the place to Holiday	Durban Average Hotel Occupancies And other targets requiring research	56,5% (2010)	70%	
Events and Mice	Provincial ICCA ranking	178 (2010)	In the top 25	
Market Growth	No. large events hosted	2010 Soccer World Cup	Minimum of 1 every 10 years	
Niche Markets – Cruise Tourism	No of cruise liner visits	Durban 67 (2010/11) Richards Bay 15 (2010/11)	Durban 150 pa Richards Bay 38 pa	

The Amajuba District Tourism Strategy is aligned to the new Tourism Master Plan which is mentioned throughout the report and strategy.

Taking the above national and provincial plans into consideration, the Amajuba tourism plan should align itself to the following key principles and ideas.

The tourism strategy should:

- focus on inclusivity and projects should be spatially diverse;
- aim to increase regional exports and boost employment through SMME development;
- recognise that tourism has a key role to play in conservation and creating sustainable livelihoods;
- take advantage of Amajuba's position as a gateway to KZN;
- recognize the important role of niche markets and understand that this is Amajuba's strength;
- aim to improve each visitors experience and the tourism brand so that South Africa can achieve global top 20 tourism status; and
- align with branding, marketing and service excellence outlined in the KZN Master Plan

AMAJUBA PLANS

Amajuba IDP





Vision: Amajuba will be a fully developed district, with a vibrant and sustainable economy, a better quality of life, preserved within its own cultural and traditional values.

It is the general perception that the ADM in **not a major investment or tourism destination** in KZN. There are, however, opportunities that can be developed in this regards with the agriculture and tourism sectors representing important economic sectors that can be nurtured to bring about further economic development and growth

The following areas of growth potential have been identified in the IDP, namely:

- Battlefield development and Amajuba Tourism Route.
- The Amajuba Birding Meander.
- The development of tourism opportunities around the proposed Ncandu River Dam.
- The further development of the Balele Nature Reserve at Utrecht.
- The development of a Fly-fishing Meander.
- The development of a proposed residential estate at the Newcastle Golf Course.

The IDP has committed to improving the D96, R34 and Utrecht-Groenvlei-Wakkerstroom roads which are all vital tourism roads.

AMAJUBA LOCAL ECONOMIC DEVELOPMENT PLAN (2011)

According to the LED strategy, it is difficult to measure the contribution of tourism to the district economy as GVA from the tourism industry is spread across a number of other sectors. However, catering and accommodation within Amajuba contributed 0.6% to total GVA in 2010. This is expected to be only a portion of the total GVA generated from the industry. The contribution of this sector to total employment is 1.5%, which equates to approximately 1290 employed persons. The following challenges and opportunities are presented in the strategy.

Challenges:

- a) Historical association of the district as a mining and industrial centre;
- b) Lack of coordinated promotion of the region and attractions offered;
- c) Run-down and lack of tourism facilities;
- d) No specific draw-card attraction to make the district a priority for tourists;
- e) Lack of sufficient signage along the N3 and also within the district to promote tourism facilities and attractions;
- f) Loss of tourists to larger tourist attractions such as the Durban beachfront, Drakensberg Mountains, and the north and south coast.

Opportunities:

 a) Establishment of extension services for natural attractions such as the Ncandu and Chelmsford Reserves at the foothills of the Drakensberg, as well at historical attractions including battlefields





- b) The development of the N11 as a possible dual carriage toll road will be key in the future success of the development of the battlefield sites.
- c) The role of marketing and tourism campaigns would play a key role in creating long-term sustainable tourism development for the area. With such limited tourism to the area there is an opinion that domestic tourism marketing could build an 'exploration' brand for the domestic market. The concept of developing and branding a 'tourism route' for Amajuba is one that should be explored as a means of linking Gauteng with key tourism areas in KZN via Newcastle.

The following strategic thrusts and programmes are suggested in the LED for tourism development.

_					
4	Furthering Tourism	4.1	Strategy Alignment	4.1.1	Implement relevant interventions identified in the KZN Tourism Strategy
	Development			4.1.2	Undertake a review of the Tourism Strategy
			Promoting and	4.2.1	Development of an Amajuba Brand
			Marketing	4.2.2	Roll-out of District Tourism Marketing
		4.3	Tourism Opportunities	4.3.1	Battlefield development and Amajuba Tourism Route
				4.3.2	The Amajuba Birding Meander.
				4.3.3	The development of tourism opportunities around the proposed dam sites (Ncandu, Tom Worthington as well as Zaaihoek), the Drakensberg and the Noddle projects
				4.3.4	The further development of the Balele Nature Reserve at Utrecht.
				4.3.5	Develop Ntshingwayo Resort Game Park;
				4.3.6	Develop Ncandu Nature Reserve / Incandu Forest Reserve
				4.3.7	The development of a Fly-fishing Meander.

Amajuba Tourism Strategy (2004)

The previous tourism strategy recommended the following key projects (priority number in brackets):

Midway Meander (1) Game Farming & Hunting (7)

LUMS – Identification of Tourism Nodes (2) Birding (7) Newcastle Tourism Precinct (3) Events (7)

N3 Information Centre (4) Development of Arts & Crafts (7) Environmental Centre (5) Dam Sites / River Sites (Private)

Battlefields Development (6) Golf Courses (Private)

Matching Tourism Opportunities with Land Trout / Bass Fishing Resort (Private)

Claims (6)

The strategy focused on putting Newcastle on the map from a tourism perspective by creating a meander that crosses district boundaries and a tourism precinct. The vision was to make Amajuba





the premier Battlefields destination in the region. The strategy was perhaps rather idealistic and many of the projects have unfortunately, not been implemented.

OTHER TOURISM PLANS include the Battlefields Development Plan and, the Signage and Route plans. The Battlefields Development Plan is still relevant as many of the sites are still in a state of disrepair. The signage and routes plans have been successfully implemented in the district and provide a useful marketing tool.

LOCAL MUNICIPALITY PLANS

NEWCASTLE

The most recent IDP (2011/12) gives hardly any attention to tourism, and there is few to no tourism projects suggested. There is also no CTO, although the nomination process is in progress. It is promising, however, that a tourism manager was hired at the end of 2010 to drive tourism in the area. The most recent LED strategy was conducted in July 2007 and concludes that business tourism should be the focus for Newcastle. Other growth areas identified in the strategy were battlefields; birding; adventure and sports tourism as well as art, crafts and cultural tourism.

EMADLANGENI

Emadlangeni has recently established its CTO which is keen to start improving tourism in the area. Furthermore, the municipality is in the process of appointing management for the Balele Game Park which will take the form of an agency. These are two very positive steps for the local municipality with regard to tourism. Tourism has been established in the IDP and LED (2011) as a key driver of local economic development. The mission in the IDP reads: 'We will focus on tourism development, game farming, agriculture, local economic development, job creation and skills development.' The following goals are outlined under tourism development in the IDP and LED:

- Tourism Awareness (initially through formulating a tourism plan for the area)
- Small town revitalization
- Marketing (develop a marketing strategy and improve signage)
- Expanding the tourism niche (by engaging with stakeholders and identifying products)
- Twin Cities Programme (seek funding a development from Utrecht, Netherlands)
- Communication and information (development of a brochure and website)

DANNHAUSER

There are very few tourism attractions in Dannhauser, however, tourism has been identified as a key growth sector in the IDP(2009).

Vision: "By 2015, the municipality will strive to be a sustainable area, with safe, attractive living environment, and an available economy, based on agriculture, industrial and tourism development, providing sufficient job opportunities".





A tourism strategy was undertaken in 2009. The following assets were identified:

- Arts and Crafts Centre in Durnacol.
- Fort Mistake
- St Margaret Presbyterian Church
- The Mosque
- Ntshingwayo Dam
- Cut Flower Farm
- Traditional Arts and Craft such as Midsize Beadwork, Simiso Art and Crafts, etc.
- Bomani Game Lodge
- Tweediedale Dam & Caravan Park.

TOURISM BY-LAWS

By-laws cover various local government issues such as public roads and miscellaneous, parking grounds, public open spaces, street trading, public health, cemeteries and crematoria, emergency services, culture and recreation services, and encroachment on property. Often by-laws are communicated and enforced by local municipalities, metro police and CTOs. Newcastle has a particular issue with service providers ignoring the tourism by-laws in relation to signage. Many illegal signs are put up around Newcastle at a rate that the LM cannot keep up with. Emadlangeni and especially Dannhauser have very few By-Laws relating to tourism. This needs revision. A full analysis of the current by-laws across all three local municipalities is necessary.





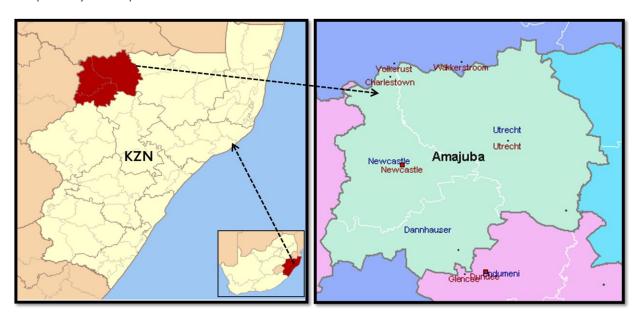
SECTION 3: SITUATIONAL ANALYSIS

The situational analysis describes the status quo of tourism in the district and includes, mainly, a supply and demand analysis, as well as, a spatial-economic review, and an analysis of the current marketing strategy and institutional structure.

SPATIAL-ECONOMIC PROFILE

The Amajuba Municipality is located in the north-western corner of the Province of KwaZulu-Natal (KZN), and comprises three local municipalities, namely Newcastle, Emadlangeni, and Dannhauser. The map below displays the location of the district and local municipalities in relation to the rest of KZN:

Map 1: Family of Municipalities in the Provincial Context



Amajuba is 6 910 km2 in size with Emadlangeni (previously Utrecht) occupying the largest area of 3 539 km2, Newcastle some 1855 km2 and Dannhauser some 1 516 km². Amajuba District Municipality accommodated an estimated 468, 837 people in the year 2010. Newcastle, Dannhauser and Emadlangeni accommodate 72.3%, 5.4% and 22.2% of the population respectively.

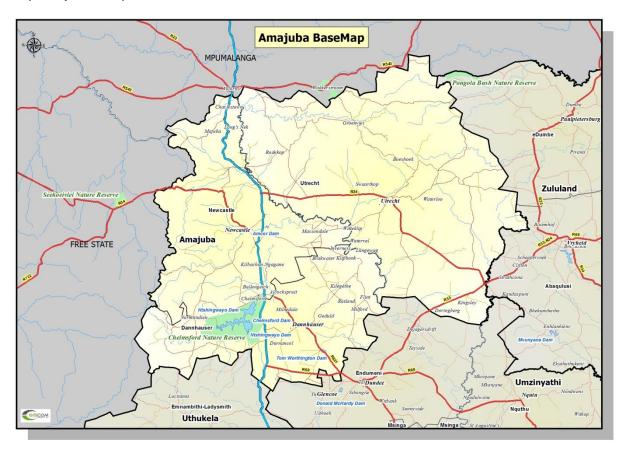
The alternative route from the east coast to Gauteng, the N11, passes through Amajuba. The route links the district to both the major port of Durban and the industrial complex of Gauteng, and the main rail line from the Durban harbour to Gauteng also travels through Amajuba. The R34 bisects the district from east to west and provides a linkage from the port city of Richards Bay to the hinterland. Therefore the district is well positioned to take advantage of passing trade. However, the fact that Amajuba is bordered on two sides by the Freestate and Mpumalanga means that coordination of these routes with regard to maintenance and linking for tourism purposes is made more difficult. Amajuba is also bordered by uThukela (Drakensberg and wildlife), Umzinyathi (Battlefields), and Zululand (heritage and wildlife) which means that big 5 game reserves, famous





battlefields sites and Zulu cultural experiences are easily accessible from Newcastle. The following map depicts the road networks and districts discussed.

Map 2 Amajuba Basemap



The total GVA for the province was estimated at R269 billion in 2010, while this figure was just over R9,3 billion for the district. Therefore the district accounts for about 3.5% of the total provincial GVA. The Amajuba district accounts for 3.8% of total employment in the province, which is in line with its GVA contribution of 3.5% to total provincial GVA. The graph below describes the employment contribution and GVA contribution of each sector. Manufacturing contributes 25% to GVA, wholesale and retail trade as well as government services are the next two highest contributors. The highest growth sector is finance and insurance and the lowest growth is the agricultural sector which is in line with national and provincial trends. The highest number of people employed are in the wholesale and retail trade sector, with government sectors next highest.

Majority of the economic activity falls within Newcastle. This is true also of the tourism activity in the district. It is however difficult to measure the contribution of tourism to the district economy as GVA from the tourism industry is spread across a number of other sectors. However, catering and accommodation within Amajuba contributed 0.6% to total GVA in 2010. This is expected to be only a portion of the total GVA generated from the industry. The contribution of this sector to total employment is 1.5%, which equates to approximately 1290 employed persons. The extent of this sector on the economy of Amajuba can be noted by the Vodacom Newcastle Winter Festival, which





attracts over 30,000 people, and has a significant impact on the local economy.² The following table describes the contributions to GVA and employment by sector.

Table 3 Percentage contribution and growth of GVA and employment by sector

	Gross Value A	dded	Employment		
	Percentage contribution	Average annual	Employed number	% growth	% contribution
	to GVA	growth 2005 - 2009		2005 – 2010	total
Agriculture, forestry and fishing	(2010)	-8.3%	2 044	-8.1%	employment 2.4%
Mining and quarrying	3.4%	3.9%	810	3.1%	1.0%
Manufacturing	25.2%	-1.6%	14 339	-1.6%	17.0%
Electricity	2.6%	-0.2%	234	-2.4%	0.3%
Water	0.6%	2.3%	80	-2.4%	0.1%
Construction	1.9%	6.3%	3 926	0.7%	4.7%
Wholesale and retail trade	12.1%	1.3%	16 576	0.0%	19.7%
Catering and accommodation services	0.6%	0.5%	1 292	-0.7%	1.5%
Transport and storage	6.7%	4.4%	3 791	1.8%	4.5%
Communication	3.7%	11.1%	372	1.1%	0.4%
Finance and insurance	9.7%	14.2%	1 671	1.0%	2.0%
Business services	9.8%	6.6%	8 738	2.7%	10.4%
Community, social and personal services	6.3%	3.8%	14 796	0.5%	17.6%
General government	15.2%	3.3%	15 541	1.1%	18.5%

Source: Quantec regional Dataset (2010), Urban-Econ growth estimates

² Amajuba LED review (2011), Urban-Econ





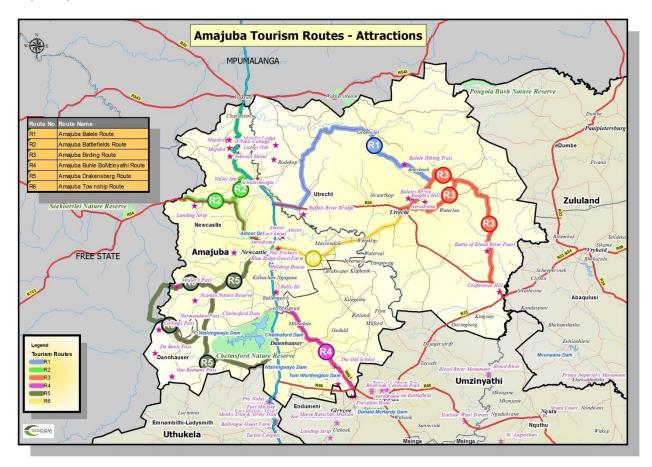
SUPPLY ANALYSIS

The following supply analysis conducts a full audit of the tourism attractions and accommodation facilities in Amajuba. It also provides insight into which are most successful, which have growth opportunities and which have challenges.

ATTRACTIONS

The following map depicts the attractions in Amajuba spatially. From the map it is clear that majority of the attractions are Battlefields and fall within Newcastle LM. It also shows the importance of the routes which link Newcastle to outlying attractions in Dannhauser and Emadlangeni.

Map 3 Amajuba Tourism Routes and Attractions



Source: Urban-Econ

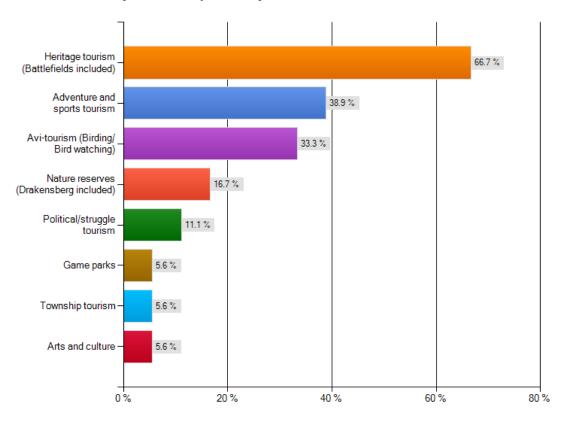
The graph below describes which attractions service providers in Amajuba think best promote the district. The results are from a survey conducted for this report in December 2011. 67% of service providers felt that the Battlefields were the best way to promote tourism in the district which is in line with the number of attractions and the current marketing strategy. Interestingly, 39% and 33% of service providers respectively felt that sports/adventure tourism and avi-tourism best promotes Amajuba as a tourist destination. Notably, these are all niche markets.





Figure 4 Graph describing which attractions best promote Amajuba as a tourism destination

What do you feel best promotes your district as a tourism destination?



Source: Online survey conducted by Urban-Econ, 2011

The following sections give a brief overview of each of the major attractions in Amajuba.

AVITOURISM

The dti's Tourism Directorate identified birding tourism or avitourism as a potential high-growth niche. Tourism KZN's occasional paper no.67 on avitourism notes that this niche market, although highly specialized, is capable of generating a substantial amount of income into a 'birding' region. It is capable of providing sustainable jobs for qualified guides. It is a viable alternative to extremely destructive environmental practices, thereby both providing income, and protecting sensitive bird habitats which, in turn, encourage larger numbers of birders and thus more income into local economies. The occasional paper concludes that more bird-rich areas need to be identified in the province, particularly in poorer, rural areas, in order that the potential for increased avitourism to occur. The potential of avitourism as a niche market is marked throughout the literature.

What are the benefits of avitourism in Amajuba?

 Avitourism's potential contribution to South Africa's GDP is in the range of R1,205 billion to R2,243 billion annually.





- If Amajuba is able to attract just 2% of the total South African market (21 000 at minimum annually), and if each of those stay 4days on a modest spend of R4000 in Amajuba then there will be a direct income of R1 680 000 annually. Using a multiplyer of 1.3, this means R2.2 million added to Amajuba's GGP from birding alone each year.
- Avitourists spend more per visitor than those in other niche market segments.
- Avitourists have higher than average income levels, longer trip lengths, and a greater tendency to visit multiple provinces than mainstream tourism market segments. They also spend a higher total number of days per year travelling for birding purposes.
- Domestic and international avitourist profiles correlate with priority market segments targeted by South African Tourism.
- Avitourism generally has positive environmental and conservation impacts.

Avitourism Defined:

- Avitourism refers to travel outside of one's usual environment, to view birds in their natural habitat.
- This definition applies to both domestic and international avitourists in South Africa.
- NB: This niche market does not include hunting tourism (e.g. wingshooting).

Avi-tourism is a major potential attraction in Amajuba, with over 400 species of birds being identified in the region. Amajuba also has a large number of endemic and some endangered birds which are the primary reason that birders are attracted to an area — especially international birders. Utrecht has the biggest Amur Falcon Roost Site in the Southern Hemisphere. The Amajuba Birding Meander is well promoted along with other identified routes in Amajuba and is in the process of being promoted as one of the routes on the BLSA website. There is also possibility to expand this route to form a Northern Natal Route (as there is already a Southern Natal route being marketed). Birdlife Northern Natal is active in the area, constantly developing routes, marketing, doing research and guiding. The editer of the Birder Online resides in Utrecht is actively involved in promoting Utrecht as a birding area. An e-brochure about birding in Utrecht has been sent to birding clubs and a facebook page has been created.

Wakkerstroom, which lies just outside Amajuba's northern border, is considered a 'mecca' for birding and, while Amajuba spots are not included in the national list of 'hot birding spots' yet, Wakkerstroom is. This provides an opportunity to attract birders who are already nearby to explore new areas offered in Amajuba such as the Ncandu forrest and the Balele Game Park and surrounds. Newcastle is surrounded by birding sites and can therefore be promoted as a central point where birders can stay and go on day trips. As mentioned, Wakkerstroom is 70km north; Memel 50 KM west (both of these are Ramsar Sites which means that they are internationally recognized wetlands); Kempenfeld Vulture Restaurant is 80 Km south of Dundee; and the Eskom Ingangula pumped storage scheme with its adjoining highly preserved wetlands (which is also being developed as a nature reserve) is 80 km away. The area north of Utrecht forms part of one of the largest Important Bird Areas (IBA) in South Africa (as identified by BirdLife South Africa) and as such is a haven for threatened species. The Important Bird Area actually crosses over to Wakkerstroom in





Mpumalanga and also includes the north-eastern Free State, incorporating reserves such as Seekoeivlei Nature Reserve near Memel. Threatened bird species that occur within this IBA include:

✓ Southern Bald Ibis, Lesser Kestrel, Wattled Crane, Blue Crane, Corncrake, Whitewinged Flufftail, Rudd's Lark, Botha's Lark, Yellow-breasted Pipit (globally threatened species); Secretarybird, Bittern, Martial Eagle, African Marsh Harrier, Grey Crowned Crane, Striped Flufftail, Stanley's Bustard, White-bellied Korhaan, African Grass Owl, Short-tailed Pipit (nationally threatened species); Pallid Harrier, Black Harrier, Blue Korhaan, Blackwinged Pratincole, Ground Woodpecker (globally near-threatened species); Black Stork, Greater Flamingo, Peregrine Falcon, Lanner Falcon, Blackwinged Lapwing, Orange Thrush, Broad-tailed Warbler (nationally near-threatened species).

Currently, there are no registered 'birder friendly' establishments in Amajuba. This needs to be corrected so that the area can be promoted on the Birdlife South Africa (BLSA) website. 'Birder friendly' establishments require a certain level of birding expertise on staff, literature, and bird viewing spots to be considered for registration. Previously, BLSA did not register budget accommodation, but this is changing due to the economic crisis. BLSA has agreed to register any birder-friendly establishments that meet their promises and offer a good service. If a list of birding accommodation can be formulated and linked to the popular birding accommodation in Wakkerstroom and Memel as a Northern Natal Birding Route this could attract birders to Amajuba. Balele Game park is such a birding spot, however, bird hides need to be renovated, and information specific to birding such as hunting season times, access etc needs to be made available to birders.

The sites most appropriate for birding are:

- ✓ Duckponds in the Newcastle area
- ✓ Bird routes on Muller's Pass and Normandien Pass
- ✓ Biggar's Pass / Knight's Pass Route;
- ✓ Route via the dirt road from Biggar's Pass to Wakkerstroom incorporating Groenvlei (there are also two accommodation establishments en route, which could be utilized as opposed to Wakkerstroom)
- ✓ Chelmsford Nature Reserve, and
- ✓ As mentioned, Balele Nature Reserve.

It is important when establishing Amajuba as a birding area that bird guides are available. There were trained birding guides previously but they did not receive enough business to be viable, possibly due to the fact that they were stationed in Memel and their services were not advertised well enough. It is essential that, before investing again in the training of bird guides, that guides are committed and realize that guiding will not provide a decent income at first. Community leaders have expressed interest in nominating community members to become guides, however, they would need to have other sources of income until demand picks up. There are several options here that need to be assessed. Another possibility is to start on a small scale and get the existing bird guides from Wakkerstroom interested in covering an area like Balele Game Park in Utrecht and use this then to establish the size of the market and only then, if warranted, select suitable new candidates





dedicated to Amajuba. The challenge with this is that Wakkerstroom is 45 minutes away and does have a different selection of birds.

Marketing is essential to attract the size market required to sustain birding infrastructure, accommodation and guides. Currently, the BLNN website is down and there is no promotion of Amajuba on the BLSA website which means that there is very little online marketing currently being done. This needs to be improved through, firstly, engaging with BLSA to market Amajuba routes and accommodation on their website, and, secondly, providing BLNN with the finance and capacity to build and maintain their website. Events are also important in gaining exposure – birders in the area are keen to organize events which should be supported by the district if possible.

NATURE AND GAME RESERVES

Amajuba has a host of nature reserves and game parks, including the unique 'Town within a game park', however, it does not have any 'big 5' reserves which often serve to attract tourists from other parts of South Africa.

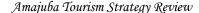
Table 4 List of Nature Reserves, Game Parks and Lodges in Amajuba

Game Parks		Nature Reserves	Other private accommodation	
Bonani Game Ran	ch	Ncandu Nature Reserve	Balele Mountain Lodge	
Utrecht Balele Reserve	Game	Chelmsford Nature Reserve (KZN Wildlife)	Majuba Lodge	
		Bivane Wetland Reserve	Grey Goose farm Lodge	
			Bivane River Lodge	
			Waterloo Farm	
			Luiperd Kloof Trout Lodge (Natural Heritage Site)	
			Drakenbergkloof	

Source: Urban-Econ

The accommodation listed above is situated close to nature and has game of some sort on the site. Most provide hunting, fishing, horse-riding and other nature based activities. They are assets to the district and are being marketed appropriately through the several routes that have been created. Further information and marketing will continue to attract people to these sites. Interviews suggest that once people have found the lodge, they often return several times. Marketing needs to reach new tourists. This could be aided by increasing communication technology in the rural areas, this includes phone and internet technology. Often these places have poor access to their markets and vice versa. If technology cannot be improved on site, then tourist information centers with decent internet and phone lines should be set up in Utrecht and Dannhauser to manage demand and communications.

The Utrecht/Balele Game Park is branded the 'Town within a game park' and is, therefore, marketable and unique. The game park is popular with local tourists who often return to fish, go for







walks, birding, and to enjoy the surrounding scenery. The park offers camping, caravan and self-catering facilities. At night, game is allowed into the town. Utrecht also has cultural heritage which can be explored by tourists visiting the game park. Unfortunately, both the town and the game park are not being kept up to tourism standards. There is still an 'I' for information inside the front gate, but there is no information centre or brochures even. The room is being used by crafters who sell their mats to the local community. These crafters could be used as a point of interest for tourists as they are undertaking a traditional craft.

Recently, positive steps have been taking by the Emadlangeni Municipality to improve the game park. An agency is being created to manage the park, based on the model used by Umkhanyakude District when forming their agency Umhlosinga. A board of directors will be appointed to hire staff with the appropriate skills to manage a game park. The staff and management of the park will be handled by the agency who will report directly to the Emadlangeni council. A percentage of the revenue will be paid to the municipality and the rest will go back into developing the park and the agency. External funding is still required to set up the agency but it is hoped to be running by the 1st of July this year (2011). Currently, capacity at the park is around 180 people as there are only 36 caravan sites, 9 small cottages and 3 rondavels. Over high season, several people are turned away.

Another opportunity in Emadlangeni is Zaaihoek Dam. The dam is currently untapped, but DOT plans to build a new road linking Utrecht to Wakkerstroom near the dam which could help to open up this opportunity.

Chelmsford Nature Reserve is one of two sites managed by KZN wildlife in Amajuba. Regular visitors attend the site in order to carry out a range of water sports. The dam boasts 286 Oribi which are under special wildlife management. The graph below shows that out of 25 KZN wildlife sites, Chelmsford is the 6^{th} most visited. This shows its value to the province and the district. Chelmsford can expect up to 32,000 day visitors a year. Majority of these are over the summer months when there are up to 3000 visitors a month.





Figure 5: KZN Wildlife Visitor Statistics 2011



Source: KZN Wildlife

The dam could attract more visitors each year if there was more accommodation, and of a higher quality. Currently, there are only 8 chalets on the near side of the dam - these are fully booked throughout summer. Similarly, the camp site is fully booked in summer – there is opportunity to convert the day visitor area (Red Sands) into a camp site to meet demand. On the far side of the dam, at the 'Ridge Gate' area there are four chalets which are of poor quality. This area could be further developed and is in need of renovation. The roads within the dam are also in need of renovation – especially the main road from the registration office through to the main camp site which experiences a lot of traffic. The roads leading to the dam from Dannhauser and Normandien could be improved, and signage on the main roads is necessary. Events are held throughout the year, especially fishing events, which attract a large amount of visitors consistently throughout the year. Other events include cycling and swimming competitions, and fun runs. Water and nature based events need to be sourced and further promoted through marketing and communication with sports clubs in surrounding areas such as the trails and mountain clubs. Weddings are also an option. There is opportunity for conference and wedding facilities to be developed.

DRAKENSBERG

The Drakensberg Escarpment runs from Utrecht to Newcastle, and then on to Normandien and Ladysmith. There are access roads along the bottom of the escarpment (notably the D96 and R34), and roads along the top of the escarpment. There are at least 7 or 8 passes crossing the Berg, between the upper and lower roads. This includes a pass at Utrecht (Knight's Pass), Majuba pass, Botha's Pass, Donkies Pass, Sakse's Pass, Muller's Pass, Normandien's Pass and Collings Pass. Donkies Pass has been used for mountain challenges in the past and there is potential to increase adventure tourism along these passes and the escarpment in general. The Normandien Area in





particular, with its proximity to Chelmsford Nature reserve has the potential to become an adventure tourism/ sporting niche area if specific events can be attracted to promote the area.

Vulintaba Lifestyle Estate is a new development which lies at the base of the escarpment in an amphitheatre only 18km outside of Newcastle. The development is planned to include hotels, up to 700 stands, a golf course and academy, 46 time share units, 12km of trout water, a spa, conference and wedding venue, equestrian centre, mountain biking trails and boutique shops. This is a multibillion rand development which holds immense potential and may unlock tourism in the district. Development is also planned for the top of the escarpment 2000feet above Vuilintaba. The area boasts 12 waterfalls. It is vital for this development to go ahead that the D96 which runs from west Newcastle to this development is tarred. There are a number of B&Bs along this road which would also benefit from this road being tarred. Several craft stands could be opened along the road, and cultural artists could, with negotiation, become a part of this development.

There are several other challenges to the promotion of the Drakensberg escarpment. Coal mining in the D96 valley is being considered. The fact that the escarpment runs along the Amajuba/Freestate border also provides problems for co-ordination of information and infrastructure. It is essential to link developments within Amajuba to towns in the Freestate such as Memel and Vrede in order to attract tourists. The R34 needs to be upgraded in order to provide better access to the many lodges along this route.

There are several lodges along the foothills of the escarpment, especially between Memel and Newcastle and then running down to Ncandu Forrest and Ncandu Falls. These include Drakensbergkloof and Engogo Riverside Lodge which specialize in trout fishing, hiking, bird watching and game viewing. This area is relatively untapped and with proper attention holds much potential. Due to its remoteness, signage is vital.

ADVENTURE AND SPORTS TOURISM

Amajuba has many advantages when it comes to promoting adventure and sports tourism. Its biggest advantage, perhaps, is its location. Newcastle is very well located to host KZN sporting events, inter provincial sporting events, and to attract the large populations of both Durban and JHB. The natural assets are located close to the town centre where there is ample accommodation. The sites offered on the escarpment and foothills of the Drakensberg from Utrecht around and down to Normandien are easily accessible by amateur sports enthusiasts, and Amajuba has the second most actively visited dam in KZN in Chelmsford Dam to aid the promotion of water sports. Currently, there are many active sports clubs in the area who are active in organizing sporting and adventure events. These events attract people from surrounding areas into Amajuba largely because the area offers a lot of different things to do while the clubs are here – this includes battlefields and other heritage sites, as well as birding, game viewing and fishing.

The largest opportunities in adventure and sports tourism come through co-coordinating events via clubs within Amajuba. Most clubs have some events that could be much larger or more frequent with support from the district municipality with regard to land, security and funds. There is also opportunity to market the assets of Amajuba to surrounding clubs. Majuba Lodge managed to





gather a lot of support for the services they offered through offering organized weekends where clubs could go fishing, shooting, game driving etc. This was done through heavily promoting themselves – inclusive of many trips to Gauteng and Durban to present for sports clubs. Generating this sort of business is worthwhile but takes time and effort and requires the dedicated coordination of a tourism driven person/persons.

- ✓ The Cycling Club holds a handful of events each year that attract people from areas surrounding Amajuba. They hold a battlefields mountain bike experience which takes cyclers to the battlefields sites over two days. The head of the cycling club has a proposed a million rand development in Newcastle that has the potential to develop sports in the town. The proposal is for a Bike Park and Development Centre and is being held up by a problem with ownership of the proposed site.
- ✓ Various fishing clubs exist and are active in organizing events at Chelmsford and other areas. Further sponsorship for events and promotion is required. Fishing attracts people from Gauteng and other surrounding areas to lodge and farm style accommodation in Newcastle. Utrecht has 5 excellent fly fishing venues that, with the right marketing, could attract more visitors than it is currently.
- The Swimming Club is also active in Amajuba. Their signature event is the Chelmsford Challenge which is registered as a 'Swim SA' event and therefore times are recorded and used as qualifying for other larger events. There is also an Olympic size swimming pool in Newcastle which holds the Regional Level 1 swimming championships. Further compitions could be held in this pool if there was a heating facility. The national standards dictate that a pool needs to be 25-26 degrees, but the pool in Newcastle is cooler than that outside of summer. The heating facility could extend the use of the pool into the autumn months and attract more events. Furthermore, the lane rope, starting blocks and time keeping device all need renovation and upgrading.
- ✓ There are several famous South African soccer players who were born in Newcastle. Including Samora Khulu who recently passed away and is considered a soccer legend. There is potential to hold soccer events, and/or benefits in these players' names and to possibly get them to attend the events to rally support. This requires communication and coordination with these players and their clubs. Other players from Newcastle include:
 - Helman Mkhalele
 - Siyabonga Nkosi
 - Sizwe Motaung
 - o Fani Madida (Amazulu Assistant Coach)
- ✓ There are three golf courses in Amajuba. One in Utrecht and two in Newcastle (one of which
 is privately owned). The municipal golf course in Newcastle is managed by the Newcastle
 Golf Club. They hold at least 3 events a year which attract between 50 and 100 people.
 However, these events are on a small scale and it is difficult to compete for major events





against the bigger cities. One yearly open championship sponsored by the district and other private enterprises with decent promotion and prize money would lift the standing of Newcaslte as a golfing town as it would attract players from Gauteng, Bloemfontein and Durban.

- ✓ The Voyagers Club is active in promoting super biking in Amajuba. Their most popular annual event attracts 4000 riders but is unfortunately being held outside of Amajuba because riders refuse to take the roads into Newcastle from Memel, Voksrust and Utrecht due to potholes riders from the south are deterred by the road works. The poor state of these roads will not only deter super bikes, but any road enthusiasts such a vintage car clubs and other sports car clubs.
- ✓ Off roading (bikes, quads and 4X4s) used to be driven by Majuba Lodge who had an off road track called the smokey mountains trail, however, the farm was sold and the trail no longer exists. The introduction of GPS has posed a problem in that the trails are largely on private land. When GPS co-ordinates are made public, other riders visit the sites without prior arrangements causing a problem for farmers. This ultimately leads to trespassing and has led farmers to stop allowing tourists through their farms. There is a need for a trail that does not conflict with private land, especially with farmers' paddocks and paddock gates.
- ✓ Equestrian sport has been recently promoted in KZN as a niche market with a lot of potential. Newcastle has a competitive advantage in that the current number one cross country/ eventing horse-rider in South Africa lives in Newcastle (Doug Walsh). Newcastle used to host international show events until the venue burnt down and there was no longer a driver of these events in town. There is a potential to get these events up and running again as they were prestigious and well supported. Currently, 14 shows are organized a year in KZN, 8 of them are international but none of them are held in Newcastle because of the lack of a venue. Potential also exists for bush racing. This is an unofficial horse racing event where rural breeders have an opportunity to showcase their horses. The track required is not costly. Dundee recently built a track and hosted an event that attracted 100 000 spectators with 100 horses competing.

Several other opportunities exist for paragliding, wing shooting, road running, triathlons, mountain climbing, and trials amongst others. The important thing is that land and proper information needs to be made available for sports enthusiasts.

BATTLEFIELDS AND HERITAGE

The Battlefields region is considered the biggest tourism asset in Amajuba. It is the only tourism region as determined by TKZN that falls within Amajuba and therefore it receives the most exposure by TKZN. However, it must be noted that the three most visited and renowned battlefields sites (Rorkes Drift, Isandlwana, and Blood River) fall outside of Amajuba. Amajuba's sites revolve around





the first Anglo-Boer war otherwise known as the Transvaal War of Independence. The sites include the following:

In Newcastle LM:

- 1. Fort Amiel in Newcastle
- 2. The Battlefield at Schuinshoogte on the road between the R34 and the N11
- 3. The British Military Cemetery and British camp site at Mount Prospect near Inkwelo on the N11
- 4. O'Neill's Cottage on the N11 at the foot of Majuba Mountain.
- 5. The Battlefield at Laing's (Lang's) Nek just off the N11
- 6. The Battlefield at Majuba

Also in Newcastle are:

- 1. The Armoury
- 2. The Military Cemetery (In the centre of the Old Town Cemetery)

In addition, in **Utrecht,** there are a number of sites relating to The Anglo Zulu War, The Anglo Boer War and the early settlement of Trekkers in the region.

In **Utrecht** itself there are:

- 1. The Old Parsonage & Museum
- 2. The Dutch Reform Church
- 3. Captain Leo Pokrowsky Monument
- 4. Petrus Lafras Uys Monument
- 5. The Old Residency
- 6. The Uys House
- 7. The Rothman & Shaw Houses
- 8. The Town Hall
- 9. The "Landrost, Post en Telegraafkantoor"
- 10. The Irrigation System
- 11. The British Military Cemetery (In the centre of the old town cemetery)

Then in Bloedrivierpoort there is the British monument and graves for the Battle of Bloedrivierpoort in the Anglo Boer War.³

A full report of the improvements needed was conducted by SiVest in 2005 and is available on the Amajuba website. Although outdated, much of what is recommended is still relevant. The priority projects recommended in the report are included as annexure 2. Perhaps most valuable in the report, however, is a maintenance plan for the sites which seem to fall between the cracks of AMAFA, Newcastle Local Municipality, and private land owners. Most of the sites are in a poor condition and simple things such as weed and waste removal are not happening. There is a challenge in that at least half of the sites have restricted access due to the fact that they lie on private farm land. This is a challenge for renovation and for tourists who cannot simply take themselves to each of the sites but need to be taken by guides who have arrangements and rapport

³ Information received from Dave Sutcliffe of the Battlefields Route and Guides Associations. Further information and contact details can be found at www.amajubaexperience.co.za





with the farmers. It is critical that Majuba Mountain, at least, is made accessible as it is the major battlefield site in Amajuba. Majuba Mountain is accessible to everyone via a gate on the commemorative farm (which is privately owned), however, the path up the mountain is eroding and in need of hand rails. Other improvements suggested by the Battlefields Route and Guides Association have also been included in the annexure.

There is one guide dedicated to the area. The guide forms part of the Battlefields Guide Association and the Battlefields Route Association which are both active in marketing the route and maintaining the route website. Unfortunately, there are not enough tourists to sustain even one guide (less than 50 in 2011), and the guide that is there does the job as a hobby rather than for stable income. It is essential that more tourists are attracted to the battlefields and heritage sites in order to sustain them. Once this guide has moved on there may not be another so willing to replace him without guarantee of income and the Amajuba leg of the battlefields route would suffer as a result. Tourists will not be attracted to the Battlefields through improving site maintenance, as with many other tourism markets in Amajuba, a vigorous marketing strategy is necessary.

While there are not many tourists who take advantage of the guide, the value of the heritage sites should not be underestimated as they add to the diversity of the tourist activities offered. Many sports clubs for example are attracted to Newcastle because of the added value that a Battlefields tour offers. In a survey conducted for this report, 66.7% of service providers indicated that the battlefields best promotes Amajuba as a tourist destination (full report in annexure). Fort Amiel alone adds to the culture of Newcastle as it holds international events such as the International Museums Day, and interesting historical events such as the ghost tour or the anniversary of the 150th years since the arrival of Indentured Indian labourers. These events, museums and monuments provide Newcastle with exposure and can begin to move Newcastle away from its image as a mining town and towards a more cultured image. Unfortunately, of the two historical museums, Fort Amiel is not open on weekends and the Utrecht Museum also does not receive enough business to be open during all working hours and on weekends. It should be noted that the museums are moving from local municipality to the provincial Department of Arts and Culture. The consequences of this for small museums like those in Amajuba need to be further researched.

Other than the Battlefields site, over 50 sites of historical importance exist in Amajuba – from forts to monuments to school buildings. Each site of significance should be noted and marked with a plaque and should have a maintenance agreement. The image of a town and how it is received or viewed by tourists is a key factor in attracting tourists to a town. The latest addition to the town's heritage is the Freedom Route which looks at struggle history – the route is discussed in more detail below.

ARTS AND CULTURE

Arts and Culture has the potential to attract tourists to towns, like Newcastle, that have a high population and active culture, but have few other tourism assets. Perhaps more importantly, it has the potential to change the image of a town, create positive publicity and regenerate urban areas through private and public interest. The following case study describes the impact that investing in arts and culture had on a town, similar to Newcastle, in the United Kingdom.





A CASE STUDY: LIVERPOOL, UK

Before 2003, within the Liverpool city region, there were marked economic, social and spatial disparities with particular neighbourhoods experiencing multiple deprivations of low income and economic inactivity, poor educational achievement, poor health and high levels of crime. This led to a poor national image of the town and Liverpool was not seen as a tourism destination. In recent years, a renewed local political leadership has sought to re-engage with national government, and to build on local economic growth and substantial public and private investment in the city. Part of this renewal involved a successful bid to host the *European Capital of Culture*.

The European Capital of Culture (ECoC) is an initiative which was launched by the European Union in 1985, with the title awarded every year and on a rotating basis to respective European Union member states. With the UK nominated as ECoC host for 2008, a national competition was held and Liverpool, alongside 12 other UK cities, bid for the title and was selected as ECoC 2008 in June 2003. In Liverpool, the aspiration to regenerate and reposition the city was placed at the heart of the ECoC vision. The Liverpool ECoC was a programme of activity with at least three levels of operation:

- 1. The **main branded programme of events** -'Liverpool 08' and related activity, coordinated by the Liverpool Culture Company with a wide range of stakeholders over six themed years (2003-2009), with a budget of £129.9million.
- 2. The intersection with the wider **city regeneration and re-imaging programme**, which emerged out of public and private partnerships and was funded mainly by private capital to a value of £4billion over eight years.
- 3. The **broader European context** involving European Commission (EC) guidelines and engagement with ECoC stakeholders from the rest of Europe. Liverpool received discrete funding of just over £800k from the EC.

The full Liverpool ECoC programme (including not only full events, but also total performance days, exhibition days, training and educational workshops) totalled over 7,000 activities in 2008 and over 41,000 activities across four years (2005-2008). Around half of these activities were workshops, education sessions or training days. The Liverpool Culture Company was set up by Liverpool City Council to co-ordinate the bid for European Capital of Culture 2008 and subsequently to deliver the ECoC activity. All staff were already staff at the council.

Since investing heavily in cultural events and urban regeneration from 2003 through to the ECoC in 2008 the following has occurred (statistics of the impact are included as annexure 3):

- The city has undergone a remarkable image renaissance locally, nationally and internationally. Local opinion leaders give more credibility to the city's cultural assets and to the cultural sector as a source of civic leadership; national media in the mainstream, as well as in specialist domains, have got used to presenting a richer picture of Liverpool as a multifaceted and contemporary city with 'world class' assets and an ability to build on them; internationally, the city has been rediscovered as a tourist destination beyond football and the Beatles.
- ✓ Levels of confidence have been raised across the city, particularly in the areas of culture and tourism. Strong partnerships have been developed, have continued post 2008 and may





bring greater opportunities to retain local talent, bring in new ideas and approaches, attract external investment and further develop the range and quality of the city's offer.

✓ Culture is more widely accepted as a driver for economic change, health and social inclusion. The cultural sector took the opportunity to play a larger role in the city's leadership in the lead up to 2008, demonstrating that they had a contribution to make across a number of city agendas. As a result, one year on, there is ongoing commitment to ensure that the sector continues to contribute in areas as diverse as community safety, tourism development, health or city centre management.

Reference: Garcia, Meliville & Cox (2010); *Creating an Impact: Liverpool's Experience as European Capital of Culture*, European Capital of Culture Research Programme, University of Liverpool

Newcastle has enough heritage, artistic and cultural assets to fully and successfully engage with a program similar to that of Liverpool in order to change the image of Newcastle from a mining to a cultural town. Carnegie Art Gallery is the only art gallery in northern natal and is the third largest gallery in KwaZulu-Natal. It is actively engaged with the community and community craft. It created 'Isiphethu' which is a group of woman who create unique embroidered art work that tells a story. Isipethu has displayed work in local and international art fairs and has generated international interest. The project receives public funding. This among other African art holds immense potential but unfortunately, due to the lack of funding and lack of a market, production is starting to drop off. The gallery organizes an annual 'Arts in the Park' fair which attracts much interest but due to lack of funding is not as large as it could be. Events such as these cause visitor numbers to spike dramatically and are therefore important.

The Gallery held a temporary exhibition in the Town Hall during August and Art in the Park in September which caused a huge increase in visitors (2000 people). In past years there was enough storage space to hold 4 temporary exhibitions a year and annual visitor figures were in the region of 14 000. The Gallery was on the venue for the Standard Bank travelling exhibitions as well as other gallery exhibitions. Unfortunately, there is now very little space and therefore the Gallery holds an exhibition in the Town Hall only about once in 4 years. Even this will not continue in future because at the August exhibition in 2011 rats had nibbled one of the sculptures. It is essential that the gallery is offered a larger exhibition and storage space, and that it receives funding to hold events which benefit tourism and the community.

Arts and Culture Practitioners in Amajuba include:

Table 5 Feedback of interviews with crafter organizations in Amajuba

Name of Crafters Location		Type of go	ods and serv	vice			
Gcwensa Culti	ural Village	Blaaubosch	Farm near	Beadwork,	traditional	attires,	educate
		Osizweni in	Newcastle	people abou	ut the Zulu Cu	Iture and	history.
Madadeni	Self-help	Emzamo	shopping	Beadwork,	traditional at	tires and	wedding
Community of	levelopment	centre near	Osizweni in	gowns			
project:		Newcastle					
Masizithuthul	kise			Mainly serv	ice providers	who go t	o schools





Multicultural Art and Craft:		and train teachers on arts and crafts. They would like to go to businesses and sell their crafting but they have been struggling since 2005 to find a place to conduct their daily business operations. They have contacted the municipality and the department of Public works but haven't got any response.
Thandusikolwakho Skills development Project:	Osizweni in Newcastle	Beadwork, grass mats and trays – traditional Zulu artefacts.

Source: Urban-Econ

Other craft groups such as the Kwamdakane Cluster which was created in Dannhauser in 2005 experience similar problems. There are currently not enough visitors to sustain art and craft in Newcastle. This can only be solved through upgrading current facilities and marketing arts and culture vigorously in tourist publications, cultural magazines, on radio and through events. The Osizweni Art Centre is one such project that has the potential to grow boost arts in the district. The Department of Arts and Culture built The Osizweni Art Centre as a District Structure situated at Osizweni, Ward 10 in Newcastle Local Municipality. It was officially opened in 2011. It is the first of its kind in the whole District and it serves artists and other stakeholders from the 3 Local Municipalities(Newcastle, eMadlangeni and Dannhauser) within Amajuba District. The first phase which was completed in 2011 cost R10m and is a relief to the artist community who previously did not have access to a facility of its nature.

With regards to the Tourism Strategy, the centre will be linked to the existing tourism routes as it has a potential to improve cultural totrism in the area. Arts and Culture in the Region and the District will work closely with the stakeholders such as the municipalities to package experiences that are artistic, cultural and unique to Amajuba District. A calender of events will be developed. Tourism also has a big potential of providing a market for cultural products produced at Amajuba District. The centre will assit with capacity building in terms of markert research and to improve quality of artifacts. It also has a potential to draw Provincial, National and even International artists.

Apart from the beautiful craft and visual arts products, there are other projects that have a potential to grow and attract people inside and outside of the District. The 2 of those projects are: The annual Amajuba Rainbow Show, which is a multicultural project where people from the District come together to talk about themselves, render multicultural-traditional performances, enjoy multicultural food tasting from a range of displayed cuisines, view and buy exhibited visual arts and crafts products. This is a project meant to create understanding amongst the people of the District and to enhance unity in diversity. It has an element of normalising relations for Tourism to prosper as well. The other project which was piloted in 2011 is the Amajuba Community Arts Festival and it also has a big potential for growth.

Combining arts with heritage and music could enhance the value of these events and marketing strategies. Lucky Dube was from Newcastle, and his grave is on a farm in the area. His daughter, Bongi Dube is also a musician. Lumkile Ngcekwa is a renowned entertainer from Newcastle. This all

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adds to Newcastle's culture. There is also possibility to link marketing strategies with Ladysmith – who have their own claim to fames, notably, Ladysmith Black Mambazo.

TOWNSHIP TOURISM

Township Tourism refers to an act whereby a group of people go to the township with a purpose to learn and experience the life and history of that particular township. They are usually headed by a tour guide who has a very strong knowledge of the township. In Amajuba District, the Carnegie Art Gallery conducts these township tours. They take people to the community gardens, an organic vegetable growing project, artist's studios, a Sangoma and a traditional place of healing. They pride themselves on the fact that their tours are academic and informative in nature.

Despite the efforts of the gallery and the municipality, who have developed a route with signage, township tourism does not attract very many tourists. This means that there are not enough tourists to sustain the route at all times which means that tourists need to book in advance so that the gallery can make arrangements for crafters and traditional healers to be present. Crafters with no guaranteed flow of tourists to their townships are more likely to leave the township for the streets in town to sell their products. As a result of the low numbers, the Art Gallery has no dedicated tour guide for these tours which is another reason guests must book in advance. Unfortunately, most visitors want on demand tours. It is impossible for the tours to be organized instantly, and possible tourists are lost – which feeds into the original problem.

During consultation, input was received from the abovementioned 4 arts and culture practitioners, as well as Msouthern Tavern; Thabo's tuckshop and sports bar; Isakabuli B&B; Ikhasi Lodge; and Iphiva Lodge. These service providers are in the Madedeni and Osizweni areas. Accommodation is supported on weekends by tourists visiting for weddings and funerals. Bars and taverns are supported by locals only, except at holiday times where people come from outlying areas to visit friends and relatives. None of these service providers had heard of the Township Tourism Route, except Iphiva lodge who have had pamphlets funded by the municipality. The only service provider to receive tourists due to the route was Gcwensa Cultural village. These were brought by Judy Jordaan and this only occurs once or twice a year.

EVENTS

As mentioned, Amajuba already is host to a number of sporting events due to its central location. This is especially true of junior and school events. Several club events, arts events and heritage events are also organized annually as mentioned in the above write up, with positive results. Data shows how visitor numbers spike during events, and research shows how positive publicity created by events leads to improved information and town image. Often events are lost, or do not attract as many visitors as they could due to a lack of funding and co-ordination by the municipality. There needs to be staff dedicated to sourcing and supporting events in Amajuba. A proper procurement strategy that outlines how funds can be made available for these events needs to be developed and relationships need to be formed with external public funders. Currently, Champ Marketing hosts a number of the more successful events.

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Annual events held in Newcastle:

- ✓ Vodacom Winter Festival (3 day festival which attracts 35 000 people)
- ✓ Waterside Cycle Event
- ✓ Amajuba Chelmsford Challenge
- ✓ The DJ Motorcycle Ralley
- ✓ Quads for Quads
- ✓ Art in the Park
- ✓ Battlefields 5-in-1
- ✓ Kosmos-Balele Mountain Challenge
- ✓ Kranskop Festival
- ✓ Donkeys Pass Mountain Challenge
- ✓ Taxi City Spar Nite Race
- ✓ Newcastle Air Show
- ✓ SABS & Round Table Blood Buddies Walk
- ✓ Chinese Dragon Boat Festival and Chinese New Year

There is potential for a host of cultural events, such as Ghost Tours, music (jazz) and arts festivals, cookery and fresh food events, sports clinics (possibly involving famous sports stars from Newcastle), markets (potential in Utrecht). While the Winter Festival is very successful and popular, there is opportunity to hold equally popular events that cater for the black tourism market segments. As mentioned above, the bush racing event held in Dundee drew over 100 000 spectators – this, as well as other equestrian and sporting events have immense potential.

ROUTES

Marketing for tourism attractions revolves around the Amajuba Routes. An A4 brochure is produced with a double page spread for each of the 6 routes. Each of the routes emphasizes a unique tourism offering in Amajuba and between them they cover the majority of attractions. The appeal of the routes is that, with the brochure, routes can be followed without a guide as there is information in the brochure and each route is signed from beginning to end. The downside is that the brochure is not up-to-date and, perhaps, over-sells the activities and accessibility of the sites along the routes.

- ✓ Amajuba Battlefields Route: The Battlefields Route stretches from 1877 1902, which includes the First Anglo-Boer War (1877-1881), the Zulu War (1879) and the second Anglo Boer War (1899-1902). Majority of the sites in Amajuba relate to the first Anglo-Boer War but the route connects up with others in the battlefields region. As mentioned in the section above on the Battlefields, the one guide for the route sees under 50 tourists a month, and sites require maintenance. The route serves to attract sports clubs and enthusiasts into the area and adds to the cultural significance of Newcastle.
- ✓ Amajuba Drakensberg Route: This route takes visitors along the western border of Amajuba through the foothills of the Drakensberg and includes Chelmsford Dam. As mentioned in the Drakensberg section above, the foothills require further development and will be benefitted by the completed development of Vulintaba.





- ✓ Amajuba Township Route: This route takes people through Madadeni to Osizweni and through to Utrecht. As mentioned above in the township tourism section, this route doesn't attract many tourists, there is not always a guide available and crafters are not always present along the route due to lack of business.
- ✓ Amajuba Balele Route: The Balele route winds along the escarpment on the eastern side of Amajuba, and borders with Mpumalanga at times. It has beautiful scenery and abundant bird life. Unfortunately, it is quite difficult to contact attractions along the route. The must-do attraction called 'Balele Adventures' had not had more than a handful of enquiries in years which is indicative of the success of the route and brochure.
- ✓ Amajuba Bivane Route: This route runs south of the Balele route and game reserve through the Blood River Poort. It lies in the Bivane wetland reserve and therefore is very scenic (including waterfalls) and offers many fishing opportunities.
- ✓ Amajuba Buhle-Bomzinyathi Route: This route cuts across from the Drakensberg eastwards along the southern side of the Chelmsford Game Reserve to cross the N11 and pass through the town of Dannhauser and the village of Hattingspruit.

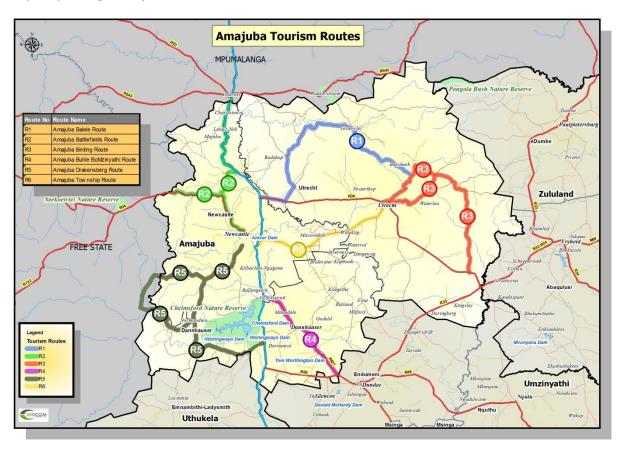
The Amajuba Birding and Fly-Fishing Meanders have been created to provide information to birders and fishermen about the type of birds and birding/fishing spots available in Amajuba.

The following map depicts these routes spatially:





Map 6 Map showing the Amajuba Tourism Routes



Source: Urban-Econ based on Amajuba Municipality Town Planning maps

The Freedom Route has recently been created by TKZN and runs throughout KwaZulu-Natal. The Amajuba section of the route has yet to be included into the brochure but has its own brochure. Armed with a map and the brochure a visitor can take themselves on the freedom route with ease. The route benefits from marketing from TKZN. The Freedom route starts with the time-line after the two Anglo-Boer Wars (Battlefields Route) and consists of:

- o the imprisonment of King Dinuzulu (1906-1910) during the Bambatha Rebellion,
- o the miner's Strike led by Gandhi 1913,
- o the teaching of Albert Luthuli (1917-18) in Blaauwbosh,
- o the birth of Mac Maharaj 1935,
- the imprisonment of the Presidents of the Natal and Transvaal Indian Congresses in the early 1950's,
- the establishments of Madadeni and Osizweni in the 1960's as part of the Groups Areas (promulgated in 1950),
- o the freedom Struggle in the 70's and 80's and subsequent TRC Hearings in 1996, and finally
- various new South Africa monuments around town.

Many stakeholders have seen the potential for a route that links Ladysmith to Newcastle and Northwards. This route would be similar to the 'Midlands Meander' and would begin shortly after the midlands meander is completed and continue along the N11. The previous tourism strategy

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referred to this as the 'Midway Meander', others refer to this route as the 'Heartland Route'. The route would require the co-operation of uThukela Municipality.

OTHER ATTRACTIONS

The following are potential tourism attractions that are currently not being exploited in Amajuba, but could possibly be feasible. Some may not prove to be tourist attractions in themselves but could help to attract funding, media coverage and to improve the image/prestige/culture of Amajuba. Further information needs to be gathered in order to determine their benefit to tourism.

TWIN CITIES PROGRAMME (UTRECHT, NEWCASTLE)

Majority of the international visitors to Utrecht, come from Utrecht in the Netherlands, Europe, to explore the history of the town and visit the grave site. Further research needs to be done in order to understand the relevance of the historical connection, and which institutions or tourists would be interested in this connection. Newcastle, South Africa, also falls under a group called 'Newcastles of the World'. The tourism/marketing potential of this is to be determined.

FAMOUS PEOPLE

There are several famous sportsmen, musicians and other prestigious people that were born in Newcastle. If a relationship is developed with these people, they could be used to attract media coverage for events, increase attendance and perhaps even arrange sponsorship. The benefits of having a connection with these prestigious people needs to be further explored. The following is an initial list of famous/prestigious people who come from Newcastle.

- John Philip "Bakkies" Botha Rugby union player
- Sathyandranath Ragunanan "Mac" Maharaj ANC member, Politician, Presidential Spokeperson and Businessman
- Helman Mkhalele Soccer player
- Siyabonga Nkosi Soccer player
- Moulana Cassim Mohammed Sema Muslim educator
- Siphiwe Nyanda the Former Minister of Communications in South Africa
- Sizwe Motaung Soccer player
- Peggy-Sue Khumalo Former Miss South Africa
- Thokozani Ndlovu L'vovo Derrango -Musician
- Pastor Khathide Famous Preacher
- Thokozani Hustladj Nkwanyana Businessman
- Lumkile Ngcekwa- Musician, music director&artist manager
- Lucky Dube Musician(1964–2007)
- Bongi Dube Musician
- DJ Jamez- Disc Jockey
- Samora Khulu- Soccer Legend(19 -2008)
- Margaret H. Marshall Chief Justice of the Massachusetts Supreme Judicial Court





Fani Madida – Former Soccer Player (Current Amazulu Assistant Coach)

AGRICULTURAL TOURISM

Agricultural tourism occurs when a person visits a working farm or any agribusiness operation with the aim to enjoy, learn, or just to be part of the activities and operations on the farm. It teaches people about plants (what they are for, where it is productive to grow them, and what they can be used for); and animals (mostly wild animals). There is currently very little agri-tourism in Amajuba. This is, firstly, because of a lack of resources, and, secondly, due to a lack of promotion. However, there is an organisation that promotes and manages agri-tourism in Amajuba. The organization is made up of a group of volunteers who are interested in agriculture and doesn't receive any assistance from the district municipality. The organization arranges for schools, mainly, to learn and spend time on farms in groups that reach up to 100 per month, and some tourists who visit the area.

VIRTUAL TOURISM

A company called Roger Layton Associates is in the process of, in partnership with the Okahlamba municipality, creating a comprehensive audit of all businesses and tourism assets in Eshowe which will then be uploaded onto a web portal called xtownx. The focus of this project is to create a geographical database of information that is collected door to door as opposed to on the internet, allowing each SMME and crafter through to larger businesses to have their contact information recorded on a map that can be accessed online. Roger Layton Associates is also busy working with the Albert Luthili museum in KwaDukuza in order to create a digital archive of biographical information that may later be used to develop online virtual tours of museums. This way, a tourist can experience the museum online before visiting it. These sorts of technological innovations should be taken advantage of so that Newcastle can be amongst the first in South Africa to approach tourism in a new way and move it forward.

EDUCATIONAL TOURISM

Educational tourism involves visiting other countries to learn about their culture and lifestyle. It includes programs such as student exchange programs and study tours. It is said to be one of the fastest growing areas in tourism but it is often overlooked by the tourism professionals. India has grown to be one of the top travel destinations in the world, partly because many foreign nationals were attracted by the education offered. This is true even of South Africans who often travel to India to study. The international education industry is Australia's largest services export sector, contributing \$11.7 billion to the Australian economy in 2006-07. Students from more than 100 countries come to Australia to learn English for academic, work, travel or personal reasons⁴. With the shortage of universities in South Africa and with Newcastle being so central, there is potential to build a University, and perhaps offer English courses for business men and students.

⁴ Department of Foreign affairs and trade, Australian Government, http://www.dfat.gov.au/aib/tourism_students.html





ACCOMMODATION AND FUNCTIONS

The following table provides a list of accommodation places in Amajuba. There are over 30 B&Bs, 7 hotels, and almost 20 lodges. The majority of these are located in Newcastle. The high number of B&Bs and hotels in Newcastle, coupled with the high number of conference facilities offered, is indicative of a business traveler market. Majority of the B&Bs reach over 80% occupancy during the week, but are empty on weekends. Acommodation in Newcastle needs to do more to meet the needs of business travelers in order to encourage them to stay a night, where they may otherwise go home immediately. It is essential that B&Bs offer free wifi. It would be useful to conduct a survey of business men to determine their exact needs. There is very little backpacker or low budget accommodation suggesting a low number of tourists under the age of 30. There are also insufficient camp sites. The camp sites at Chelmsford Nature reserve and Balele are fully booked over the holidays. These should be made larger and new camp sites in new tourism areas such as the Drakensberg foothills and Balele Mountains should be established.

Table 6 List of Accommodation offered in Amajuba

Bed and Breakfast				
Ashdene B&B	Home & Away Guest House	Sintokha Guest House		
Avalon guest Manor	House Ebony	Siyaphumula B&B		
Belveders Guest house	Isakubuli B&B	Tiger's kloof B&B		
Camelot Guest House	Isidingo Guest House	Zamambongi Guest House		
Century Place B&B	Izinga Guesthouse	Zipho's B&B		
Comfit-Zone	Jabulujule Guest House	Zodiac B&B		
Dunga House	KwaNtulindawo Guest House	2 The End		
Gracelands Guesthouse	Loli's B&B	Belvederes B&B		
Greaves Street B&B	Newbali B&B	Monikas Guest House		
Guest House Kestrels	Patterson B&B	Mountain View Guest House		
Haggards Hilldrop	Phumula Nathi Motel	Walala B&B		
Heritage House	Robin's Nest B&B			
·				
Lodges	Hotels	Nature reserves		
Newcastle Country Lodge	Newcastle Inn	Bonani wild and Wonderful		
Aloes Country Lodge	Santorini Suites	Chelmsford Nature Reserve		
Arbor Farm lodge	Sizakancane Hotel			
Bivane River Lodge	Tramonto Boutique Hotel	Self Catering		
Blood River Outspan Lodge	The Haven	Victoria Self Catering		
Cannon Lodge	Blackrock Garden Court			
Farmhouse Lodge	Capricorna	Budget Accommodation		
Ikhasi Lodge		D&H Lodgings		
Iphiva Lodge	Holiday resort			
JNB Lodge	Vulintaba Country estate	Caravan Park		



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Khaya Mini	Rus n Bietjie
Luiperd kloof trout lodge	Balele Game Reserve
Majuba Lodge	
The Oak Tree	Guest Farm
Engogo Riverside Lodge	Blue Ridge Guest Farm
Klipsringer	Eco Park Private Game Farm
Zinyathi Lodge	
Drakensberg Kloof	Guest Farm and Museum
Grey Goose Farm Lodge	Amajuba mountain and commemorative farm

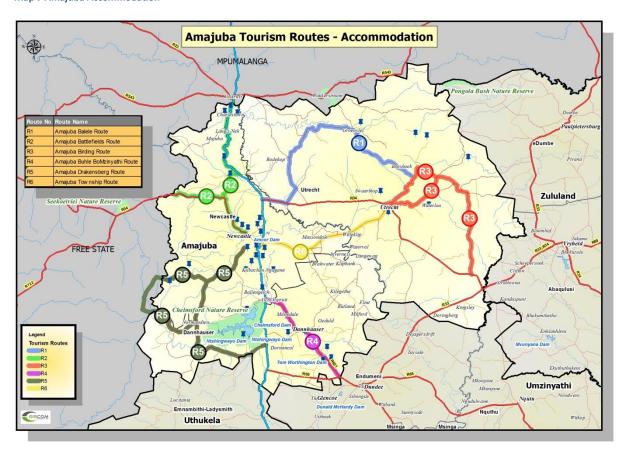
Source: Urban-Econ and Newcastle Tourism Information Centre

The following map depicts these accommodation places spatially. From the map it is obvious that majority of the accommodation falls into Newcastle and surrounds, with a few places scattered in the Utrecht and Normandien mountains, as well as on the road to Volks Rust. Several accommodation places exist in Madadeni and Osizweni within the townships. A few of these have received funding from the municipality and SEDA, however, numbers are fairly low still. Most of the visitors to these places are visiting friends and relatives (often for weddings and funerals) on the weekends. Township service providers requested that signage be put up at the entrance to the townships leading to the establishments as in Newcastle Town. There is also a need for the TIC to direct clients to these establishments as they are largely unknown and advertising is expensive and difficult.





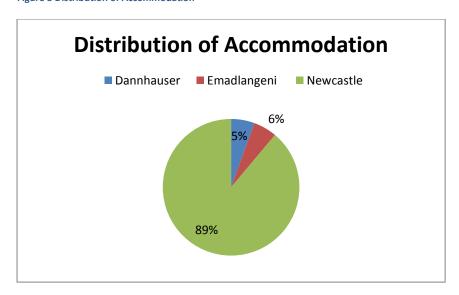
Map 7 Amajuba Accommodation



Source: Urban-Econ

The following graph provides a graphical representation of the above map. A full list of accommodation separated by local municipality is included in the annexure.

Figure 8 Distribution of Accommodation

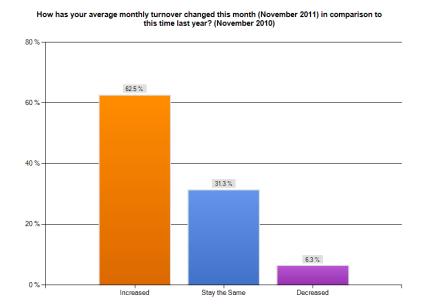






The graph below gives an indication of how well service providers (74% of which are accommodation places) are doing financially. The graph forms part of the results of a tourism service provider survey conducted online over December 2011 for the purposes of this report. The graph shows that 63% of service providers' revenue had increased over the previous year. 31% had stayed the same and only 6% felt that revenue had decreased in 2011 when compared to 2010. This is a positive result and shows that business is improving.

Figure 9 Graph showing Change in revenue of tourism service providers in 2011 when compared to 2010



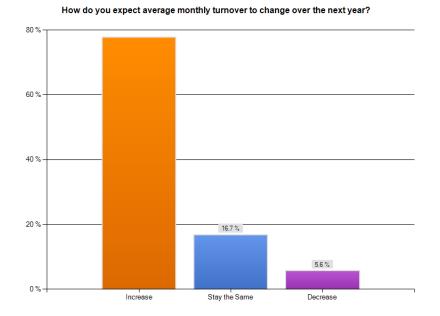
Source: Urban-Econ online survey, December 2011

The following graph shows how service providers expect their revenue to change in 2012 compared with 2011. This gives a good indication of business confidence. Almost 80% of service providers are confident that revenue will increase in 2012. Only 6% felt that revenue would decrease. This reflects high business confidence.





Figure 10 Expected change in revenue of tourism service providers in 2012



Source: Urban-Econ online survey, December 2011

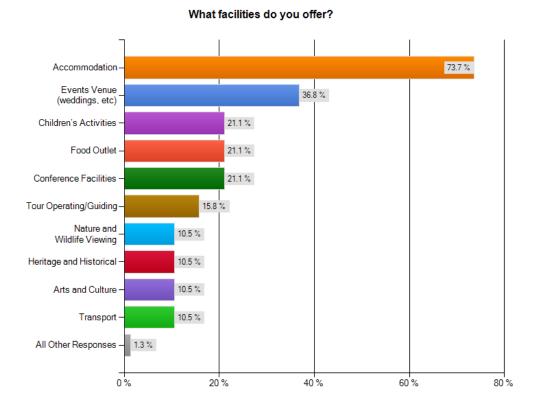
CONFERENCES AND FUNCTION VENUES

Due to Newcastle's location and population, functions are a good means to support tourism service providers. The attendees of these events may come from outside of Amajuba and therefore are tourists. It is important to attract the local market to function venues in Amajuba rather than losing them to competition venues in the popular Drakensberg and Midlands locations. This can be done through opening scenic function venues on farms and in the foothills of Utrecht and Drakensberg, as well as by pricing the functions competitively. Conferences are less under threat from surrounding regions due to Newcastle being the primary business node in Northern Natal. Conference venues need to be adequately advertised and meet standards that business men are used in JHB and Durban.

The following graph is taken from an online survey of tourism service providers in Amajuba conducted over December 2011 for this strategy. The graph shows the type of facilities offered by tourism service providers in Amajuba. 37% of service providers offer a venue for events and 22% offer conference facilities. This is much higher than other attractions and gives a good indication of what the demand is in Amajuba.



Figure 11 Graph showing the type of facilities offered by service providers in Amajuba



Source: Urban-Econ online survey, December 2011

Most of the lodges in the list above provide conference and function facilities. The following is a list of the more well-known conference and function sites:

Table 7 Conference and Function Venues in Amajuba

The Pines	Majuba Lodge	Century Casino
Zebra Lodge	Town Hall	2 the End B&B
BlackRock Casino	Horseshoe Guest Farm	Newcastle Show Hall
JNB Lodge(Dannhauser)	Izinga Guest house	RSD Wealth
Grey Goose Farm Lodge	Newcastle Club	Cannon Lodge

Source: Amajuba tourism brochure

SUPPORT SERVICES

Support services are those services that tourists require when visiting an attraction. These include, amongst others:

Banking and finance,

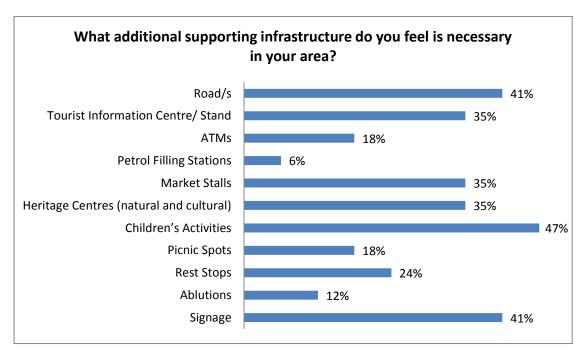




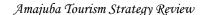
- health services,
- safety and security,
- legal services,
- tourism information,
- tourist infrastructure,
- transport infrastructure,
- restaurants and entertainment.

Fortunately, Newcastle is a secondary node in the province and has very good infrastructure and amenities. Emadlangeni and Dannhauser have less quality infrastructure but are both within an hour of the services offered by Newcastle. The following graph represents the results of an online survey of Amajuba service providers conducted in December 2011 for the purposes of this report. It describes which infrastructure tourism service providers think is the most necessary in Amajuba. Over 40% of service providers said that childrens' activities, roads and signage was most necessary. Most comments in regard signage had to do with signs on the N11 and there not being enough signage for accommodation outside of Newcastle (specifically in the townships). Most would agree, however, that signage is very good in Amajuba since the implementation of the signage and route plan. Between 30% and 40% of service providers mentioned that there should be market stalls, culture and heritage centres, and a tourist information centre. 24% of service providers suggested rest stops be built on the roads leading into and out of Newcastle, and ablutions are particularly required at battlefields sites. Further research is required regarding the outdoor facilities in order to understand where they are needed.

Figure 12 Graph showing what tourism support infrastructure is necessary in Amajuba



Source: Urban-Econ online survey, December 2011







There are several well-known restaurant franchises and pubs in Newcastle, as well as a music venue. Urtrecht and Dannhauser, however, have no restaurants or evening entertainment (Utrecht does have a café that is open during the day, and a couple that offer catering services on request). The feasibility of a restaurant or tourist appropriate late night entertainment in Utrecht or Dannhauser is questionable. Entertainment for families is scarce across Amajuba. During interviews and surveys it consistently was mentioned that there were not enough family entertainment venues in Newcastle particularly. Suggestions include a bowling alley and parks. A proposal has been made by the cycling store in Newcastle to build a bike and skate precinct that would help to fill this void, however, a small part of the land required is municipal owned and is not being made available to the developer.

TOURISM INFORMATION

Information is the most important driver of tourism growth. Interviews and surveys suggest that tourism would be better in their area if people knew about their attractions (such as the town within a game park). Efficient provision of information has the ability to make travelers stay an extra night and return again. Therefore, perhaps the most necessary and important infrastructure required in Newcastle is a new tourist information centre. The current information centre is situated in town at the town hall and does not receive many enquiries. There is very little signage to suggest it is there and few tourists would venture into the middle of the CBD to visit it. There should be a new location for the centre that is on the N11, at the entrance to town, or at a major intersection, with satellite info stands in other appropriate areas such as the mall and Wimpy. Given that the N11 is an important national road and that it is a gateway to KZN, there should be information on other tourism destinations and information centres. There should be smaller information centres in Dannhauser and, especially, Utrecht. Currently, there are no info centres in these towns.

The current information centre is ill-equipped and under staffed. Often emails aren't working and phone lines have problems. Staff should be equipped to immediately respond to all enquiries with relevant contact details and can, if appropriate, forward the contact details of the enquirer to several service providers so that they can respond directly. This will attract businesses to belong to the CTO as they will be able to see the benefit of being registered with the tourism information centre. Currently the centre is well stocked with brochures but it is rather drab. The information centre should reflect the districts chosen image. It should have television screens, light up interactive maps and info stands and crafters selling merchandise. It should also provide computers and internet for tourists to use. The tourism officials from Newcastle and Amajuba municipality should write up standards of best practice that staff of the info centres should maintain and model themselves on the Durban central and iLembe information centres.

It should also be emphasised that each tourism business should act as a tourism information centre in themselves. All service providers should be linked. Each service provider should be able to provide the tourist with a large amount of information. Service providers should work together and recommend each other until a proper network is formed. Given that the majority of visitors to Amajuba are business travellers, the type of information and its distribution needs to be tailored a bit differently to that of more popular tourist destinations. Information needs to cater towards business travellers – accommodation, maps, restaurants and garages, short term rentals and hostels





as opposed to attraction information. Information needs to be placed in offices and plants/factories around town.

The graph below describes the sorts of enquiries that the information centre receives and can be used as a tool to understand the information that the centre should gather and distribute. The information on enquiries is collected by the tourism information centre. Most enquiries (31%) relate to accommodation, while 19% of enquiries are for maps. 7% and 5% of enquiries respectively are for information on tourist attractions and brochures.

35% 31% 30% 25% 19% 20% 14% 15% 10% 7% 5% 3% 3% 5% 2% 2% 2% 2% 2% 2% Accommodation 0% Chelhstord Mature reserve **Enquiries**

Figure 13 Graph showing a breakdown of enquiries made to the tourist information centre in 2011

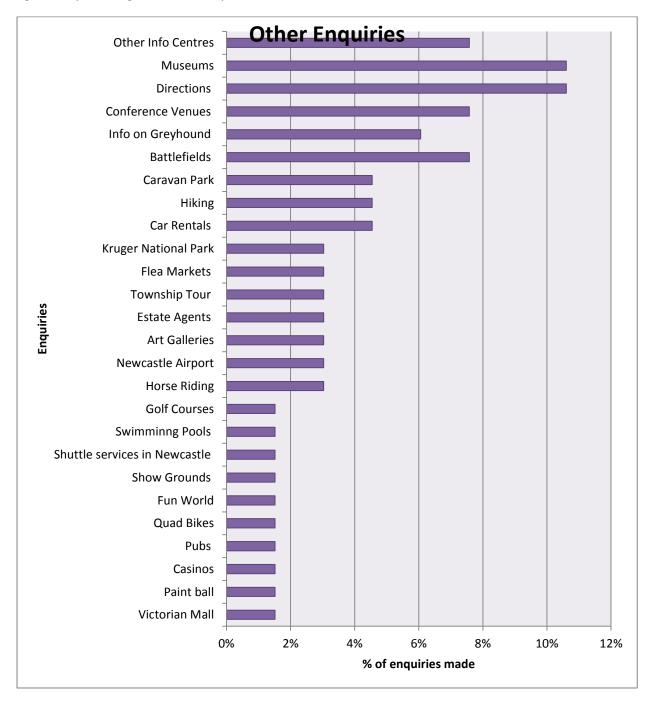
Source: Newcastle Tourism Information Centre

The graph below gives a description of the enquiries entitled 'other'. These are enquiries that have been made less frequently in the previous year.





Figure 14 Graph2 showing a breakdown of enquiries made to the tourist information centre in 2011



Source: Newcastle Tourism Information Centre

There are several websites with tourism information given:

- √ http://www.battlefields.kzn.org.za (privately owned)
- √ http://www.newcastle.co.za
- √ http://www.amajubaexperience.co.za (privately)
- √ http://www.amajuba.gov.za
- √ http://www.tourismnewcastle.co.za
- √ http://www.utrecht.gov.za

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✓ http://www.openafrica.org/route/Amajuba-Route

Other websites include the Carnegie Art Gallery website and the Birdlife Northern Natal website. None of these are up to global standards (with the exception of the Open Africa site) due to lack of funding. Some of these are often not working. The websites should be the first choice on google and contain all the information a tourist could possibly need.

TRANSPORT NETWORKS

The road network that connects Amajuba to the rest of KZN and South Africa should be an advantage. The N11 is a national road that runs throughout the district and there are several gateways into KZN on the border of Amajuba. However, throughout interviews and surveys, roads came up as a barrier to tourism in Amajuba. The R34 through Memel and to Utrecht is in a particularly poor state. Road bikes refuse to travel on the route. The problem persists on the Memel side of the R34 because majority of the road falls under the Free State. Communication with Free State officials needs to occur as this is the main Gauteng access route. The road repairs along the N11 from Ladysmith to Newcastle are also a major deterrent for travelers. Stop and go traffic can cause up to an hour of delays if travelling from Durban/PMB. The N11 construction is due to continue for another 5 years. The D96 to Vulintaba and the rest of the Drakensberg foothills is not tarred which is unfortunate for the service providers along the route and for the success of the resort development. This road should be tarred in the next year through a public private partnership. Other road infrastructure projects are currently underway by the Department of Transport. These need to be incorporated into the timeframes of the strategy. The following list from the Department of Transport summarizes the current status of road upgrades:

- 1. N11 Newcastle to Volksrust roadworks proposed completion May 2012.
- 2. N11 Newcastle to Ladysmith roadworks phased completion 2014.
- 3. R34 P211, P37, P41 Memel Utrecht- Vryhied Phased roadworks anticipated completion 2014.
- 4. R621 P39, P209, P210,P35/2 Phased roadworks anticipated completion 2013
- 5. R33 P34/2 Phased roadworks anticipated completion 2013
- 6. D 96 PPP Dunblane development anticipated completion date 2013

The Newcastle landing strip has the opportunity to become an airport. Currently, DEDT are conducting a provincial airports plan that will see funding distributed over a period of years to prioritized airports in order to upgrade the sites. It is the intention in province that airports throughout the province are operating and that small airlines conduct flights between these airports. Newcaslte, being one of 4 secondary nodes in the province, being 4 hours away from the nearest airports in Durban and Gauteng, and already having a fairly high standard landing strip, is in line to receive funding to transform the airport. The study will outline management structures and standards that airports will need to adhere to. This should be monitored. It is important that Amajuba and Newcastle officials rally behind this cause as it will be a major boost for tourism in Amajuba. People traveling to the Northern Drakensberg, Ladysmith and other surrounding areas could very opt to travel via Newcastle when they haven't before. However, the negative affect could be that businessmen no longer opt to stay the night in accommodation.





The following is an excerpt from the Draft Status Quo, Municipal Airports Project by the School of Development Studies (UKZN) On behalf of DEDT. A detailed description is included in the annexure.

PREDOMINANT USE/ACTIVITY: General aviation

CATALYTIC POTENTIAL: Newcastle Airport at current is functioning sub-optimally in relation to the level of regional economy diversification and scale of regional market catchment. Newcastle municipality is the fourth largest GDP contributor in the province and boasts the second largest municipality in population. There are a host of significant heavy and light manufacturing industries in Newcastle, in addition to comprising competitive agricultural and tourism sectors. There is significant potential for Newcastle Airport to be utilised as a regional and provincial aeronautical catalyst in both the manufacturing and agri-export sectors.

THREAT(S): The current lack of strategic utilisation of Newcastle Airport as feeder for goods and services, especially within the context of a significant diversified manufacturing sector, can be seen as significant transaction cost imposed on resident industry, impacting especially on the competiveness of time-sensitive economic sectors⁵.

Amajuba has a good rail network that connects it with Durban, Richards Bay and JHB. There is also talk of a bullet train from JHB to Durban via Newcastle. The advantage of the current rail system to tourism in Amajuba needs to be further investigated.

⁵ Draft Status Quo, Municipal Airports Project by the School of Development Studies (UKZN) On behalf of DEDT.





DEMAND ANALYSIS

SOUTH AFRICA AND KZN

According to latest TKZN statistics brochure tourism contributes R194billion to South Africa's GDP a year(11% of total GDP), receives 8.1million visitors a year and employs 590 200 people. KwaZulu-Natal has a R34billion tourism contribution to GDP (8% of total GDP), receives 956 550 visitors a year and employs 216 000 people. Importantly, the South African tourism market is growing at 15.1% and KZN at 11% which is double the growth of the world and African tourism markets. For a tourism market that is already adding so much to GDP, this growth is very positive. A change in international traveler trends is occurring. While traditional international markets are still top of the list of travelers and spend (USA, Germany, and UK); untraditional markets are starting to creep into the top ten lists. These include China, Japan and Hong Kong. Due to the global economic crisis, Americans and Europeans are opting for cheaper local holidays, whereas developing countries in South America and Asia are experiencing growth and starting to travel internationally.

FOREIGN VISITORS

KwaZulu-Natal - The Foreign Tourist Picture 2010

Number of visitors annually 956 550 mn

Average spend per visitor ±R7 215

Total market value R8.75 bn

Length of stay - average 6.8 nights

Main overseas source markets UK, USA, France, Germany, Australia

Source: SAT 2011

KwaZulu-Natal's Top Ten Foreign Tourism Source Markets 2010

1. Swaziland	213 025	22.3%	6. Mozambique	34 664	3.6%
2. Lesotho	125 549	13.1%	7. Germany	33 084	3.5%
3. Zimbabwe	113 079	11.8%	8. France	32 548	3.4%
4. UK	71 059	7.4%	9. Australia	29 350	3.1%
5. USA	42 365	4.4%	10. Botswana	28 912	3.0%

Source: SAT 2011

The adjacent table describes the KZN foreign tourism profile. The number of foreign tourists has decreased from 2009, reflecting the global economic crisis. Top overseas source markets are still the same

with UK topping the list. SADC countries fall into the top three foreign tourism markets. It should be noted that these visitors who may only be coming for business, shopping and VFR reasons are still included as tourists.

The following table describes the preferences of the foreign market. Top of the list are shopping and nightlife which is not surprising considering most of the foreign market is SADC countries. Visiting natural attractions, wildlife and the beach are also common preferences for foreign tourists. Interestingly, 13% of foreign tourists visited a casino. The casino is an attraction that can be marketing more thoroughly to the benefit of tourism in Amajuba.





Some Activities Undertaken in KwaZulu-Natal - African Air Departure and Overseas Visitors 2010

	Air*	Land
Shopping	78%	96%
Nightlife	83%	48%
Visiting natural attractions	40%	6%
Beach	49%	38%
Wildlife	27%	6%
Social	28%	34%
Cultural, historical and heritage	22%	6%
Theme parks	26%	10%
Business	23%	7%
Adventure	4%	1%
Visited a casino	13%	4%
Sporting competed	1%	1%
Trading	0%	4%
Sporting attended	17%	3%
Medical	1%	1%
Hunting	1%	0%
Health	2%	0%

^{*}African Air Departure and Overseas Visitors Source: SAT 2011

DOMESTIC VISITORS

KwaZulu-Natal - The Domestic Tourist Picture 2010			
Number of visitors annually	±8.3mn trips*		
Average spend per trip	±R710		
Spend - total direct value	±R5.6bn		
Average length of stay	4.6 nights		
Main source markets	KwaZulu-Natal, Gauteng		

Source: SAT 2011

KwaZulu-Natal - Top 5 Domestic Source Markets 2010

- 1. KwaZulu-Natal
- 2. Gauteng
- 3. Limpopo/Mpumalanga
- 4. Free State
- 5. Eastern Cape Source: TKZN 2011

more trips made by domestic tourists, the spend is far less, meaning that one foreign tourist is worth ten domestic tourists. It should also be noted that Newcastle is well positioned to

take advantage of the top three domestic

source markets of KZN, Gauteng and

The adjacent table describes the KZN domestic tourism market. It should be noted that while there are far

The following table describes the activities of domestic tourists in KZN. Unfortunately, a tour of the battlefields falls at the bottom of the list of preferred activities. This is in line with the Amajuba demand analysis which states that there is little demand for battlefields. Taking part in sports events and water sports are high on the list, as well as visiting galleries and museums. Newcastle can take advantage of both of these.

Mpumalanga.





Activities Undertaken in KwaZulu-Natal - Domestic Visitors 2010

Activity	%
Go to the beach	57.8
Go to a live show, theatre or concert	17.3
Watch a live sports event	24.1
Visit a museum, art gallery or historical building	22.6
Visit a nature or wildlife or game reserve	25.8
Take part in a sports event	18.5
Take part in any water sport	12.3
Visit an arts or craft outlet	11.7
Visit an African township or cultural village on a tour	19.3
Food and wine fair	8.8
Go hiking or mountain climbing	10.6
Bird watching	8
Art and crafts festival	6.3
Attend a conference, workshop or training session	5.5
Visit a health spa	5.6
See bushman paintings	6.6
Fly-fishing	5.2
Horse riding	4.4
Go backpack/hostel travelling	5.7
Mountain biking or other cycling	7.2
Tour of the battlefields	2.9

Source: TKZN 2011

AMAJUBA

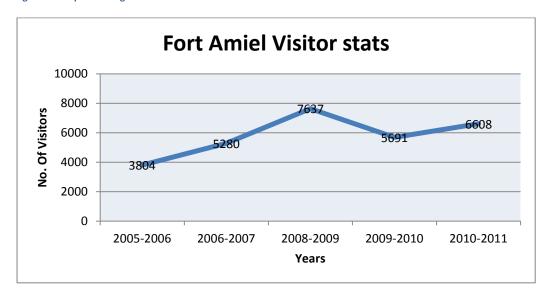
It is difficult to apply the TKZN statistics directly to Amajuba, as Amajuba does not fall into any of the tourism regions. While Amajuba contains battlefields sites, they are far less popular than the sites in surrounding regions. Many of the assumptions made in the demand analysis that follows, therefore, are derived from extensive consultation with tourism service providers in the area – many of whom have been working for more than 30 years in tourism in Amajuba. What follows is a brief analysis of visitor statistics for some of the major tourist attractions in Amajuba.

BATTLEFIELDS DEMAND ANALYSIS

Of the battlefields sites, the only two to draw a significant number of visitors are Fort Amiel and Majuba Commemorative Farm. Majuba Commemorative Farm has ablutions, picnic facilities and a large Youth Hostel. Here, Amajuba Day is commemorated every year and will see around 1200 campers for the weekend, along with school groups that make use of the hostel facilities throughout the year. Visitor numbers at Majuba do not exceed 3000 in a year. At Fort Amiel there is a museum and the curator holds events on the site, most of which do not relate to the War and are supported primarily by local people. The graph below represents the yearly visitor numbers recorded for Fort Amiel. The most recent year saw 6608 visitors in a year.



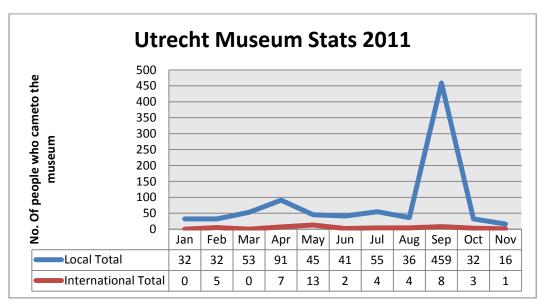
Figure 15 Graph showing the visitor statistics for Fort Amiel from 2005 to 2010



Source: Provincial Museums Department, Visitor Book Statistics

The other Battlefields sites attract less than 100 visitors a year in total. In 2011, the Battlefields guide took less than 40 tourists to the sites within Amajuba. The graph below shows the visitor statistics for the Utrecht museum. From January to November 2011 there were 892 domestic visitors to the museum and 47 international visitors. 467 of those visitors were in September, which is the month that the museum held their Heritage Day event.

Figure 16 Graph showing Utrecht Museum visitor stats for 2011



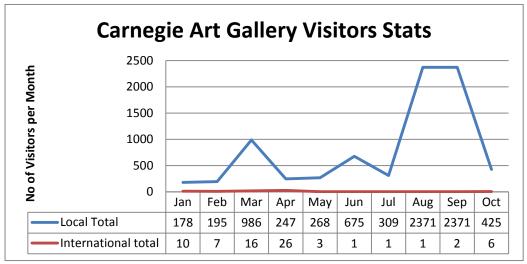
Source: Provincial Museums Department, Visitor Book Statistics





The graph below shows the number of visitors to the Carnegie Art Gallery in Newcastle from January to October 2011. Over the year the Gallery received 5654 domestic visitors and 73 international tourists. This puts the total year's figures just over 6000 people. 4700 of those were over August and September when the Arts in the Park and town hall exhibition took place.

Figure 17 Graph showing Carnegie Art Gallery Visitor Stats for 2011



Source: Provincial Museums Department, Visitor Book Statistics

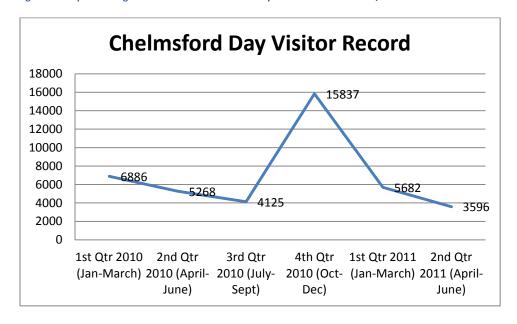
The gallery runs the township tours and is in constant contact with crafters who sell their crafts at the museum. The curator at the gallery is concerned at how production is dropping due to lack of demand for crafts. There simply is not the market for the crafters goods. The gallery does arrange shows that allow crafters to exhibit, and the Isiphethu crafters have attracted some international attention. Township tours are also not well supported with less than 50 visitors a year. There is too little demand to allow for a permanent guide and permanent sites, which means that tours must be booked in advance. This deters possible tourists.

NATURE RESERVES DEMAND ANALYSIS

Statistics are only available for Chelmsford Dam and Balele Game Park. Balele is only capable of receiving around 180 overnight visitors. It reaches this capacity over school holiday only. Out of season numbers are far lower. In a year, Balele's overnight visitors will not exceed 1000 people. Unfortunately, day visitors are not recorded, although the park has suggested that numbers are very low. The graph below describes the number of day visitors to Chelmsford Nature Reserve. In a year, Chelmsford can receive over 30 000 day visitors. In winter, numbers reach 4000 people but in summer numbers go up to 16 000 people. These numbers include a wide array of sporting events which attract many people to the dam throughout the year.



Figure 18 Graph showing Chelmsford Nature Reserve Day Visitor Record for 2010/2011



Source: KZN wildlife gate statistics

EVENTS DEMAND ANALYSIS

The largest event in Amajuba is the Winter Festival which attracts +-30 000 visitors to Newcastle. Over a few days this event attracts more visitors than the largest attraction (Chelmsford Dam) does over an entire year. More of these people come from neighboring districts too. Other events such as the Chinese Dragon Boat Race can attract around 5000 people for the day. This event alone attracts more people in one day than the gallery, the Utrecht museum, and battlefields attracts in one year. The more minor sporting events and club events can attract from 200 to 500 people who take part and spectate. The statistics above reflect the importance of events to the museums and art galleries who double their yearly figures over one event.

ACCOMMODATION DEMAND ANALYSIS

Most accommodation that falls outside of Newcastle LM is small and has low demand. Lodges in the Drakensberg and Utrecht foothills often only sleep around 10 people and are not often full. Accommodation in Dannhauser hardly ever has guests and instead focuses more on functions and conferences. This is true also of some lodges and service providers in Emadlangeni who have turned to hosting functions and conferences as an alternative. Dannhauser and Emadlangeni do not receive enough visitors even to sustain a restaurant. The tourists who do travel to these areas are niche tourists interested in hiking, fishing and bird watching.

Accommodation within Newcastle Local Municipality, however, is thriving. There are around 20 B&Bs, upwards of 3 hotels, and several lodges in the area that are all sustained by frequent travelers. Demand for majority of the accommodation is mid-week where service providers are often over 80% full. Popular B&Bs are often 100% full during the week which is rare. Demand on weekends, however, drops off completely; often leaving those same B&Bs empty on weekends.





Furthermore, surveys suggest that most travelers only stay 2 nights on average – this suggests that visitors are not holiday tourists but rather just passing through or in the area for business.

CONCLUSION: ATTRACTION DEMAND ANALYSIS

The following table summarizes the above analysis by providing approximate visitor numbers for each of the attractions discussed.

Table 8 Approximate demand for various attractions

Attraction	Number of Visitors		
Fort Amiel	6600 visitors a year (largely events)		
Majuba Mtn and Commemorative	3000 visitors a year (half of this in one weekend plus		
Farm	schools)		
Utrecht Museum	900 visitors a year (half of this in one day – Heritage day)		
Other Battlefields	In total around 100 visitors a year		
Carnegie Art Gallery	6000 visitors a year (3/4 of these over two events)		
Townships Tours	50 people a year		
Balele Game Park	1000 visitors		
Chelmsford Nature Reserve	30 000 visitors a year		
Winter Festival (Primary Event)	35 000 visitors over 4 days		
Chinese Dragon Boat racing	5000 visitors over 1 day		
(Secondary Events)			
Chelmsford Challenge (Tertiary	200-500 people over a few hours		
Events)			

Source: Urban-Econ Estimates based on consultation and statistics available

It is clear from the table and the above analysis that:

- ✓ While the Battlefields are marketed as the major tourist attraction, demand for the sites within Amajuba is actually very low, with less than 500 visitors a year (events exluded).
- ✓ The museums rely heavily on events to drive their yearly visitor numbers, which would otherwise remain between 300 and 600 a year.
- ✓ Chelmsford Nature Reserve attracts the most visitors a year out of all tourism products, although majority of these are local visitors partaking in recreational activities rather than tourism.
- ✓ Events remain the biggest draw card in Amajuba with numbers matching those of the other tourism products over a day or two. Furthermore, primary (Winter fest), secondary (5000 people plus), and tertiary events (sporting and club events) attract people from outside the district and the province.
- ✓ Accommodation outside of Newcastle does not receive a high demand, while accommodation in Newcastle often reaches 80%+ occupancy mid-week with visitors staying two nights on average. This suggests a large business traveler demand base.





Majority of the demand in Amajuba comes from business tourists; therefore the primary focus of the tourism strategy for Amajuba should be business tourism. The secondary focus should be on events which attract large numbers of tourists from within Amajuba, surrounding districts and provinces. As a tertiary focus, Amajuba's tourism strategy should focus on heritage, arts and culture, and nature based tourism.

DEMAND MODEL

Given the above conclusion, the following model has been created, derived from TKZN visitor statistics and SAT market segments. The model gives an idea of the number of tourists Amajuba can expect and into which market segments they fall.

Table 9 Estimated number of tourists to Amajuba

	Foreign	Domestic
Total number of visitors to KZN	956 550	8.3mn
Percentage that visit Battlefields	7%	2%
Number that visit Battlefields	66 960	158 000
Percentage of those that visit Amajuba	5%	25%
Number that visit Amajuba	3 348	39 500

Source: Urban-Econ, derived from TKZN Statistics Brochure, 2011

STRATEGIC NATIONAL TOURISM CONSUMER SEGMENTATION

As part of a strategic tourism marketing and growth approach, South Africa Tourism has classified potential international and local markets to the country into key market segments, resulting in what is now known as the SA Tourism Market Segments. These segments are classified in terms of Age, Life Stage, and Travel behaviour in terms of short, mid and long haul travel. The following two international markets have been identified as being key markets for national targeting. These same markets are prioritised at provincial level.

WONDERLUSTERS (INCLUDING UPSCALE WONDERLUSTERS): The Wanderluster segment is made up of younger singles or couples, with average ages ranging between 24.8- 35.8. They generally do not have children. They are young urban professionals, who travel between one and twice a year, earn higher incomes and are generally widely travelled. When visiting a destination, they seek nature, culture and adventure, and are particularly drawn to an urban vibe . While also concerned with issues of safety and comfort, these consumers are driven more by the emotional appeal of a destination and its diversity. They are generally the most positive segment towards South Africa in every market but they also want to travel the world.

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"NEXT STOP SOUTH AFRICA"S (NSSAS): The NSSA segment is South Africa's traditional market, because of their interest in culture, nature and wildlife. They are usually wealthy married couples. They are usually between 40 and 60 (ave age 57.3) and are experienced travellers whose children (usually older) do not stay with their parents anymore. They are drawn to natural beauty and authentic cultural experiences. Their concerns are luxury and safety.

Other market segments identified are below, form smaller target markets for the national tourism industry, and are therefore rather targeted on an opportunistic basis.

- Positive Convertibles (this has been identified as another key market segment for KZN)
- Family Travelers
- Senior Explorers
- Purpose Travelers

The foreign markets most likely to visit Amajuba are purpose travelers (these are mostly businessmen from SADC countries and Asia); and NSSAs which are the older foreign travelers who might be interested in the heritage, arts and culture, and birding products on offer in Amajuba.

The domestic market has been segmented as follows and includes the following segments:

YOUNG AND UPCOMING: Young black and usually under 30, the majority of this market is male and have few responsibilities. They are mid to low income earners (LSM 5-7) and enjoy city life, braais and parties with friends, soccer and kwaito music. They are primarily from Gauteng, Western Cape (WC) and Eastern Cape and travel mainly intra- provincially within and to KZN and the Eastern Cape.

INDEPENDENT YOUNG COUPLES AND FAMILIES: These families are primarily high income earners from Gauteng with higher paying jobs (LSM 8-10), they have school aged children, and are interested in relaxing family holidays in KZN usually on the beach. They are also interested in classical music concerts, and enjoy rock and pop, and eating out.

STRIVING FAMILIES: These families are mainly from Gauteng, are mid to low income earners (LSD 5-7), and have kids of primary and high school age. They are hard-working and focused families who rigorously save up to go on holiday to visit family usually in KZN and Gauteng in large family groups.

WELL OFF HOMELY COUPLES: These couples are well paid professionals from KZN and the Western Cape who seek tranquil and romantic holidays. They are usually LSM 8-10, are over 30, white, and do not have children. They mainly travel intra provincially to KZN and WC, and sometimes to the EC.

HOME BASED LOW INCOME COUPLES: These are lower income couples from the EC, WC and KZN, who like to travel intra provincially. They are usually around 40 years old and have children who are of high school age or who have completed schooling. When going on holiday they visit friends and family, and enjoy going to church, cooking and gospel music.





BASIC NEEDS OLDER FAMILIES: These families are much like the former market segment, but are usually older families whose children are of working age and support the family.

GOLDEN ACTIVE COUPLES: These are couples who have generally retired and have retirement funds which have long been saved for. They are white and are mainly of the LSM 9 -10. They closely monitor their spending, and therefore when on holiday opt for self-catering and camping facilities.

Domestic travelers most likely to visit Amajuba are businessmen; independent young couples and families (attracted to Amajuba due to the nature based products on offer such as fishing and hiking); and golden active couples (attracted to Amajuba due to the wide variety of niche tourism offerings, as well as accommodation).

The following break-down of market segment numbers is based on SAT market segments, and the unique character of Amajuba as a tourism region. The segments are more likely to be domestic than foreign, and they are mostly business travelers. Those market segments seeking niche mature experiences such as fly-fishing, hiking, crafts, birding and heritage are most likely to visit Amajuba for tourism purposes. These include the NSSAs, Independent young couples and families, and golden active couples.

Table 10 Market Segments

	Foreign: 3348 Domestic: 39 500				
Market Segment	Purpose Travellers	NSSAs	Business	Independent young couples and families	Golden Active Couples
Percentage contribution	40%	60%	80%	10%	10%
Number	1339	2009	31 600	3950	3950

Source: Urban-Econ, derived from TKZN stats and SAT market segments

It should be noted that further research needs to be conducted into what exactly is meant by 'business tourism'. TKZN do not consider reps etc. as tourists as they cannot be marketed to. They are there because they have no choice and they most often do not participate in any tourism activities. However, meetings, incentives, conferences and events can be marketed. It would be prudent to conduct research into the number of MICE versus 'rep' activity.

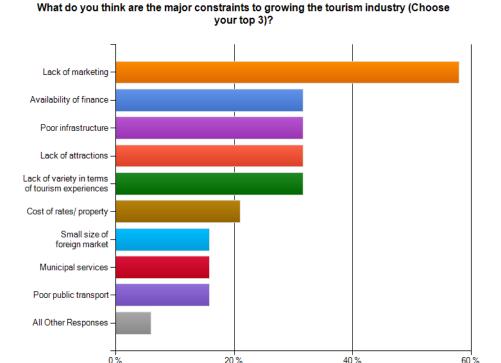
MARKETING

The graph below describes what service providers in Amajuba believe to be the biggest constraints to growing the tourism market in Amajuba. A lack of marketing is by far considered the biggest constraint, with almost 60% of respondents choosing this option. This goes some way to showing that marketing is key to unlocking the tourism potential of Newcastle.





Figure 19 Graph showing constraints to the tourism industry



Source: Urban-Econ online survey, 2011

A lack of marketing for attractions came out strongly across all tourism products during consultation. Stakeholders in arts, culture, heritage and nature based tourism all said that marketing needs to be more vigorous. Currently, the marketing strategy relies heavily on brochures. The Amajuba Routes brochure is professional and thorough but it is outdated and is only found in tourism information centres. A marketing strategy needs to reach across all forms of media and reach a wide variety of target markets. There is almost no point in developing infrastructure and new tourism products if there are no people to take advantage of these products, which is what is currently occurring in Amajuba. The cost of this level of marketing is going to be expensive and will be more easily achieved if all the municipalities, including departmental bodies will sit down together to plan and finance a proper strategy. Many local stakeholders would be happy to inform such a campaign. Further research needs to be conducted into whose responsibility marketing is and where the problem lies. For example, TKZN, associations, municipalities and CTOs are all responsible in some way for marketing, as are the establishments themselves — we need to understand what is happening at each level.

In a survey conducted for this report, 90% of service providers said that they were responsible for their own marketing. 78% said that word of mouth and brochures were their most successful marketing tools, while 56% said that marketing over the internet was most successful. This corresponds with the visitor books across KZN. According to these visitor books, most guests who wrote in the books said that they had heard of the tourism product through word of mouth. 20%





said that they had read about the product in a brochure and 3% said that they had used the internet. The internet can be a cost effective way to market businesses. Social networking only requires time.

70.00%
60.00%
40.00%
30.00%
20.00%
10.00%

Scarth Crast

Barting and England Surrounds

Website/Internet

Figure 20 Graph showing how each visitor heard about the attraction they were visiting

Source: TKZN Visitor Book Project Report, 2011

The current branding revolves around the battlefields route branding; however, this has done little to attract heritage tourists into Amajuba. Marketing needs to move away from the Battlefields and focus more on other assets such as the town within a game park, Drakensberg foothills and arts and crafts, and sports. Furthermore, this branding is due to change with the implementation of the provincial tourism Master Plan. The roll out of this new branding is still in initial stages and any marketing project should wait until it can be fully aligned to the new provincial marketing strategy. The tourism Master Plan states the following in regard to marketing:

- Marketing role of district/local municipalities limited largely to tourism information
 provision within the framework of the provincial experience led marketing and the provincial
 branding; there should be no, or limited separate tourism branding activities.
- No generic marketing of geographical areas as tourist destinations Marketing/selling is to be focused on what is bought by tourists and not where it is bought. I.e. collateral will be experience based, followed by geography. ⁶

The district needs to take into consideration, however, the market segments and numbers that it is appealing to as per the demand analysis. TKZN will never consider Amajuba a marketing priority because Amajuba does not have any outstanding 'beaches, wildlife or scenic natural beauty' compared to other places in the province. Perhaps campaigns should focus on being a tourist in your own town initially in order to gradually start to change perceptions of Newcastle, Dannhauser

^{*} NB for the North Coast is still insufficient data available to give reliable statistics

⁶ Provincial Tourism Master Plan





and Utrecht, and to increase visitor numbers. Combined marketing with uThukela municipality is also recommended. This includes possible branding of the N11 as a cultural, arts and music meander. The focus on provincial level that is relevant to Amajuba is what is considered by the Master Plan as supporting or second tear experiences. These are niche experiences such as heritage and sports tourism. These do not attract the large markets but add to the uniqueness and give variety to the KZN experience.

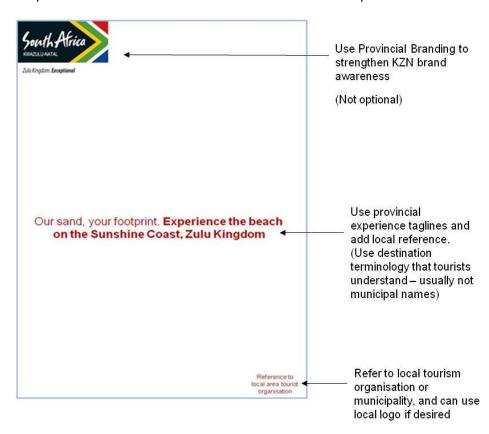
The agreed provincial branding within the framework of the national brand is:



Zulu Kingdom. Exceptional

For all marketing material, the KZN tourism branding should be used at regional level, with limited, or no, regional branding used in conjunction with the provincial brand. All marketing material should be "experience" led, but include the provincial brand and optionally include a geographic designation, which can be a local logo or brand. The use of experience specific tag lines will

enhance the destination brands and the new brand examples allow for easy integration of experiences into collateral. This is illustrated in the example below.







ENABLING ENVIRONMENT

The enabling environment includes mostly institutions and legislation. Without legislation, institutions and resources that are up to standard, tourism will not function.

HUMAN RESOURCE DEVELOPMENT AND SERVICE EXCELLENCE

As stated in the KZN tourism Master Plan, the experience that a visitor has is what is most important. The marketing stats produced by TKZN suggest that word of mouth is still the most important form of promoting an attraction. It is therefore essential that personal in the industry are of an excellent standard. This can be achieved through service grading, training colleges and in service training, as well as awards. Service grading already exists and will be enhanced as part of the provincial tourism strategy. It is important that tourism attraction take part in these grading exercises so that the district has a means of measuring service quality. Entrepreneur development is also essential so that more tourism attractions can be opened and opportunities for value adding can be taken up.

Currently, standards vary across the district. The sites and the personal are often of an average standard. Some service providers belong to the AA, TKZN and FEDHASA but a lot of service providers do not belong to any tourism organizations (especially since there is currently no CTO in Newcastle). Similarly, a lot of service providers do not have a grading — and if they do they are from different bodies such as the AA and Tourism Grading Council. This reflects Amajuba's status as a tourism destination. However, just because there are not many tourists, does not mean that there aren't a lot of visitors. These business people and people visiting friends and relatives are the people who will spread the service excellence received while in Newcastle and will slowly start to turn around Newcastle's image.

Currently, hospitality and tourism courses are offered through Damelin, Majuba College and other training institutions. These subjects are also offered at school level. A national initiative called 'Tourism Ambassadors' successfully placed 80 tourism matriculants and graduates in tourism businesses around Newcastle where they received training over a period of one year. This program is planned to continue each year.

TRANSFORMATION

Majority of the service providers are white owned, and BEE status was not researched as part of this report. However, there was a general consensus that white service providers do not have an adequate understanding of BEE requirements and transformation and are scared that the municipality is going to dictate terms. Perhaps this is something can be dealt with through the CTOs. Due to the massive events and MICE opportunities that exist in Amajuba, it is necessary for young people to have options of studying events management, and hospitality. As mentioned, there are several training institutions and apprenticeship programs offered.

The district and local municipalities, SEDA and various departments are all involved in funding black owned tourism businesses. This support is often sporadic, however, and businesses in the townships do not have the signage and exposure that larger businesses within Newcastle have.



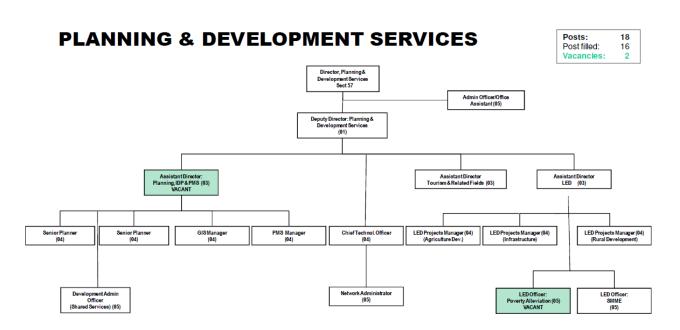


Development for arts and culture practitioners has occurred, with a multi-million rand craft centre being provided by the department in Osizweni. Unfortunately, these initiatives, such as the Township Tourism Route, are often not as successful as hoped as they are aimed at tourists that simply do not exist in Newcastle. The Isiphetu arts group has had a lot of success and international interest and initiatives like these that already show signs of success should be further supported. This is true also of local artists who do not have a forum to display their work due to the lack of space provided to the art gallery.

INSTITUTIONS

Currently, the tourism function of the district falls under the Planning & Development Services Department. The assistant director of tourism and related fields reports directly to the Director of Planning and Development Services. The Assistant Director of Tourism has an excellent relationship with the private and public stakeholders who all feel that they have been given a forum with her. However, this is just one person assigned to a very large tourism function. This necessitates significant support required from the private sector and LM officials. The following organogram taken from the IDP, describes the district structure.

Figure 21 Amajuba District Department of Planning and Development Services organogram



Source: Amajuba IDP 2011

Unfortunately, the function is limited by resources. Unfortunately, is seems apparent that Amajuba will be given a low priority status by the provincial tourism organisations. Amajuba might want to try and motivate that it is a medium tourism municipality given the number of business visitors it receives. The following is extracted from the KZN tourism Master Plan:

'Where municipal budgets are concerned the amounts allocated to tourism in the province vary significantly, and it is the same country-wide. Other research shows that LTO budgets in South Africa





range from R2,3 million to around R15 million. Current total district tourism budgets in KwaZulu-Natal, based on where information was supplied in the Situation Analysis, range from R400 000 to R2 million. Against the above background, and taking into account the need to increase the level of local tourism activity, we suggest that reasonable budgets for LTOs from the public sector, would be R2 m - R3 million for low tourism municipalities, R5 million to R15 million for medium tourism municipalities, and R15million - R50million for high tourism municipalities.

The municipal budget recommendation takes into account the principle that not all municipalities are equal in tourism, therefore different levels of tourism emphasis, resources and activity are required. '⁷

Newcastle LM has a manager of tourism and marketing who sits under development and planning, similar to Amajuba. Dannhauser has an LED officer only whose job spec includes tourism — she reports to the MM. Emadlangeni's LED and Tourism functions sit with the IDP manager who himself is also responsible for some HR functions and sits under the office of the MM. Emadlangeni is clearly understaffed and overstretched, especially considering the number of people and volume of land in the district, as well as the fact that there are significant tourism opportunities there. It is outlined in the tourism Master Plan that each LM is required to have a tourism official — this is non-negotiable. It is important that these officials liaise often with the district so that all tourism projects are guided by a single goal.

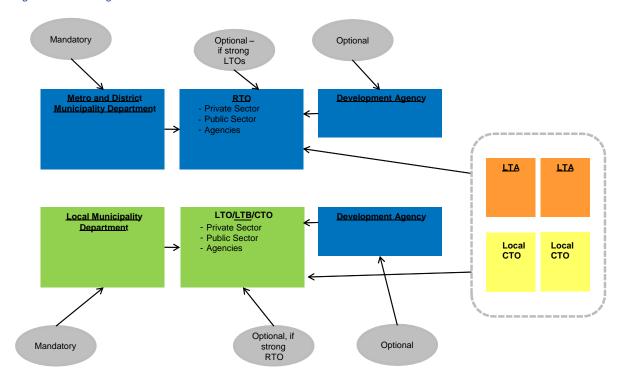
Private stakeholders are included in the Amajuba Tourism Forum which brings together a number of private stakeholders and public sector officials each with their own portfolio. The forum includes department representatives as well as local municipality representatives. It is an essential part of the tourism function in Amajuba. Each local municipality can only partner and fun one local tourism organization (this is optional). Currently, Newcastle LM is in the process of establishing a CTO. Dannhauser does not have a CTO. Emadlangeni has a comprehensive CTO, however, there is no budget to fund the organization which has to raise its own funds. The following figure describes the requirements for tourism bodies as set out in the tourism Master Plan.

⁷ KZN Tourism Masterplan





Figure 22 Tourism organizational structure



Source: KZN tourism master plan

A challenge that has been experienced by CTOs is that the municipalities try to force their ideas and plans onto the CTO. This was one of reasons for the disbandment of the previous CTO in Newcastle. It is important that private and public sector stakeholders work together and achieve a mutually beneficial relationship. Fortunately, Amajuba seems to have a good working relationship with the private sector.





SWOT ANALYSIS AND GAP ANALYSIS

SWOT ANALYSIS FOR AMAJUBA DISTRICT

The following tables list the strengths, weaknesses, opportunities and threats in Amajuba.

Strengths

- A 'Town within a Game Park'
- Chelmsford Nature Reserve 2nd most visited dam in KZN
- Amajuba is home to Birdlife Northern Natal and has several important bird species.
- A variety of nature based private lodges and activities such as hiking and fishing.
- Network of roads and location that is very central to Durban, Gauteng and Bloemfontein.
- Mountainous areas surrounding Amajuba to the east and west are very scenic.
- Several active sports clubs, and sportsmen in Amajuba who co-ordinate events constantly at a range of good venues.
- 2 museums and an art gallery (third largest in KZN) with dedicated curators.
- Several large events attract thousands of people to Newcastle yearly.
- An excellent system of tourism routes that are well sign posted and spatially varied.
- Twin cities programs in Utrecht and Newcastle
- Many B&Bs and lodges providing accommodation options. Also several conference and function venues with more popping up all the time.
- Thousands of business visitors a year.
- Strong district tourism organisations: Assistant Director of Tourism, Amajuba Tourism Forum

Weaknesses

- Historical association of the district as a mining and industrial centre
- Run-down of tourism attractions particularly Battlefields sites; arts and crafts sites; birding; and nature reserve sites.
- Lack of capacity of tourism attractions particularly accommodation facilities at Balele, Drakensberg Foothills, and Chelmsford.
- Lack of tourism attractions –no major draw-card attraction.
- Lack of signage along the N3 and N11.
- Much of the land and attractions fall onto private land, often farm-land which makes creating and maintaining attractions difficult.
- Road infrastructure several regional roads are not up to standard
- Art gallery does not have enough space to operate properly and is hidden in the centre of town.
- Township tourism route is not functioning properly due to lack of demand.
- Accommodation places do not cater adequately for business visitors.
- Lack of recreational areas and activities in Newcastle.
- Low standard tourism information centre hidden in the centre of town, no tourism information centre in Utrecht.
- Low capacity local municipality tourism organisations and departments.
- Failure to market the Black Rock Hotel and casino appropriately

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Opportunities

- Establishment of tourism attractions at Ncandu and Drakensberg Foothills, including Vulintaba Resort
- Upgrading and increased capacity of the N11
- Development of the N11 as a tourism route linking Ladysmith to Newcastle and beyond.
- Targeting and attracting, national, provincial and regional sporting events.
- Creating further adventure tourism routes such as 4by4 and biking routes.
- Promotion of Amajuba's birding spots through BLNN.
- Agency to take over management of Balele Game Park in July 2012.
- Equestrian sport including bush racing.
- Arts and culture unique crafting and art work being produced and collected, Lucky Dube's grave and daughter
- A host of famous people who come from Newcaslte.
- Agricultural Tourism
- Functions and conferences
 - DEDT project that plans to upgrade municipal airports across KZN
- Camping facilities, opening up new tourism areas.
- Links to Wakkerstroom via Zaaihoek dam, due to the new road. As well as links to Memel and Vrede.

Threats

- Continued run-down of sporting facilities such as the swimming pool.
- A lack of communication with the Freestate leads to continued degradation of the R34.
- Possibility of mining in the D96 valley and throughout a large portion of Emadlangeni.
- Decreasing visitor numbers to Battlefields across the province.
- The art gallery does not get a new space and lack of promotion leads to continued drop in production of local crafters and artists.
- Further degradation of Dannhauser and Utrecht towns.
- Lack of resources for marketing leads to insufficient demand for attractions, and the image of Newcastle as a mining town remains unchanged.
- Poor demand for tourism attractions in Amajuba and increased competition
- Airport upgrade leads to business men spending shorter time in Newcastle
- Continued inequality in demand between Newcastle town, and Madedeni and Osizweni leads to the closure of many SMMEs and lack of transformation in tourism.





SWOT ANALYSIS PER LOCAL MUNICIPALITY

The following tables divide the SWOT into each local municipality:

NEWCASTLE LOCAL MUNICIPALITY

Newcastle is the trade and industry centre in Amajuba. It is the most densely populated town, and is considered a secondary node in the province, after Durban, due to its contribution of GDP and population. Outside of Newcastle Town there is mainly agricultural activity taking place. Newcastle Municipality's key strengths lie in events and business tourism. Key challenges include degradation of events infrastructure, lack of co-ordination and information, and poor road access due to road maintenance on major routes.

Strengths:

- Network of roads and location that is very central to Durban, Gauteng and Bloemfontein.
- Drakensberg Foothills on the south western border are very scenic.
- Several active sports clubs, and sportsmen as well as high quality sporting infrastructure.
- Fort Amiel museum and an art gallery (third largest in KZN) with dedicated curators.
- Several large events attract thousands of people to Newcastle yearly.
- Twin cities program.
- Many B&Bs and lodges providing accommodation options. Also several conference and function venues with more popping up all the time.
- Thousands of business visitors a year.
- Majuba Mountain.

Weaknesses:

- Historical association of Newcastle as a mining and industrial centre.
- Run-down of tourism attractions and assets including Battlefields sites and sports infrastructure.
- Art gallery does not have enough space to operate properly and is hidden in the centre of town.
- Accommodation places do not cater adequately for business visitors.
- Lack of recreational areas and activities in Newcastle.
- Low standard tourism information centre hidden in the centre of town.
- Failure to market the Black Rock Hotel and casino effectively.
- Accommodation facilities in township areas such as Madedeni and Osizweni do not experience the same demand as places in Newcastle.
- Lack of CTO

Opportunities:

- Establishment of Vulintaba Resort.
- Upgrading and increased capacity of the N11
- Targeting and attracting, national, provincial and regional sporting events.
- Arts and culture unique crafting and art work being produced and collected, Lucky Dube's grave and daughter – multi million rand arts and culture centre in Osizweni.
- A host of famous people who come from Newcaslte.
- Functions and conferences
- DEDT project that plans to upgrade municipal airports across KZN
- Links to Memel and Vrede





• Targeted marketing of Majuba Mountain.

Threats:

- Continued run-down of sporting facilities such as the swimming pool.
- A lack of communication with the Freestate leads to continued degradation of the R34.
- Possibility of mining in the D96 valley
- Decreasing visitor numbers to Battlefields across the province.
- The art gallery does not get a new space and lack of promotion leads to continued drop in production of local crafters and artists.
- Lack of resources for marketing leads to insufficient demand for attractions, and the image of Newcastle as a mining town remains unchanged.
- Airport upgrade leads to business men spending shorter time in Newcastle
- Continued inequality in demand between Newcastle town, and Madedeni and Osizweni leads to the closure of many SMMEs and lack of transformation in tourism.

EMADLANGENI LOCAL MUNICIPALITY

Emadlangeni is the largest municipality with regard to geographical size. There are township areas, as well as a large volume of private farm land. The area has a large game reserve and Belele Mountains with a remarkable level of biodiversity. The key strengths in Emadlangeni are Balele Game Park (the 'Town within a game park'); biodiversity which allows for a wide range of nature activities including birding; and the fact that it is relatively unknown provides much opportunity for growth. The key challenges are planned coal mining; the need for funds and resources in order to upgrade Utrecht; and lack of information available to tourists.

Strengths:

- A 'Town within a Game Park'
- Home to Birdlife Northern Natal and has several important bird species.
- Twin cities program.
- A variety of nature based private lodges and activities such as hiking and fishing.
- Balele Mountains and Bivane Wetlands which are both relatively untapped.
- Utrecht museum and other sites of historical importance throughout Utrecht.
- Newly formed CTO

Weaknesses:

- Lack of developed tourism attractions and run-down of existing tourism attractions Balele Game park and birding infrastructure.
- Road infrastructure poor quality of R34
- No tourism information centre in Utrecht and general lack of information available to tourists.
- Low capacity local municipality no dedicated tourism or even IDP official.
- Lack of marketing and attractions has caused low demand and resulting lack of restaurants and accommodation.

Opportunities:

- Creating further adventure tourism routes such as 4by4 and biking routes.
- Promotion of birding spots through BLNN and BLSA.
- Agency to take over management of Balele Game Park in July 2012.
- Equestrian sport including bush racing.





- Agricultural Tourism
- Camping facilities, opening up new tourism areas.
- Links to Wakkerstroom via Zaaihoek dam, due to the new road.
- Proximity to Newcastle provides opportunities in business related tourism such as teambuilding and conferences.

Threats:

- Coal mining applications lodged for development throughout the valley.
- Further degradation of Utrecht town.

DANNHAUSER LOCAL MUNICIPALITY

Dannhauser was previously a mining town. The large mines have closed and the town has since become run down. There is a mix of under-developed rural areas under traditional ownership to the east and private farms to the west. The key strengths for Dannhauser are the mountain passes created by the Drakensberg foothills in the Normandien area, and Chelmsford Nature Reserve. The challenges are the run-down state of the town, and lack of an identity or major attraction/asset.

Strengths:

- Chelmsford Nature Reserve 2nd most visited dam in KZN
- Drakensberg foothills.

Weaknesses:

- Lack of capacity at Chelmsford Nature reserve
- Lack of dedicated tourism official in the municipality and no CTO.
- Poor tourism awareness amongst the community.
- No major tourism draw-card.
- Run-down town centre.

Opportunities:

- Nature based activities and accommodation in the Drakensberg Foothills.
- Turning Chelmsford Nature Reserve into a resort style development through Msinsi Resorts and game Reserves.
- Converting the large, closed coal mine into a 'Gold Reef City' like attraction.
- Agricultural Tourism
- Proximity to Newcastle provides opportunities in business related tourism such as teambuilding and conferences.

Threats:

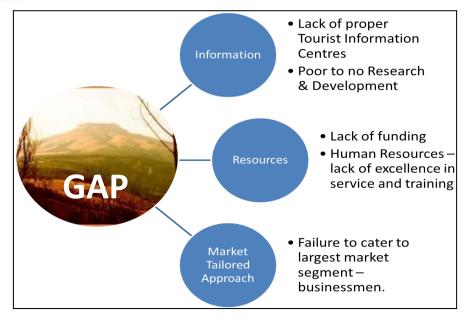
- Further degradation of Dannhauser town.
- Continued lack of tourism awareness leads to missed opportunities, poor community buy-in, and lack of investment attraction.

GAP ANALYSIS

The figure below page depicts the Gap Analysis for Amajuba. Given that businessmen are the largest market segment it seems that the opportunity this is presenting is being missed in the district at the moment. Furthermore, there is a gap in the provision and collection of tourist information. There is also a lack of funding and human resource development in the hospitality and tourism areas.











CONCLUSION OF SITUATIONAL AND CONTEXTUAL ANALYSIS

OPPORTUNITIES AND CHALLENGES

The following challenges and opportunities serve to summarize the situational analysis.

Opportunities:

- Economic status of Newcastle within KZN and central location between KZN, Freestate and Gauteng leads to:
 - ➤ High volume of business visitors
 - ➤ High volume of visitors to events (sporting, cultural and other)
- Current level of expertise, infrastructure and natural assets allow for the exploitation of niche markets:
 - Arts and Culture tourism (including music)
 - Sports tourism
 - Heritage and Battlefields tourism
 - > Avi-tourism
 - Adventure tourism (in the scenic mountains)
- Construction of Vulintaba, a prestigious lifestyle resort, in the Drakensberg Foothills could be the major draw card required in Amajuba.
- Upgrade of the N11 and Newcastle airport will lead to increased connectivity.
- Active and interested community with strong District Tourism Forum

Challenges:

- Tourism information centres in Newcastle and throughout the district are lacking.
- Roads are currently in a bad state major construction on N11, R34 in disrepair and D96 not tarred. Furthermore, majority of the traffic bypasses Newcastle due to placement of the N3.
- Site maintenance and upgrades are necessary for almost all niche attractions, and nature reserves.
- Lack of dedicated staff in Dannhauser and Emadlangeni Municipality to manage tourism, lack of CTO in Newcastle LM.
- Lack of comprehensive marketing and promotion strategy:
 - Poor image of Newcastle and lack of knowledge about Dannhauser and Emadlangeni
 - Poor and declining demand for niche attractions
- Exclusion of Dannhauser and Emadlangeni, as well as SMMEs (due to low demand)

BASELINE INDICATORS BASED ON NTSS AND KZN MASTER PLAN

The following table provides baseline values for key tourism indicators in Amajuba. These indicators have been taken from the NTSS and KZN Master Plan. Where values were given for South Africa and





KZN, they have been included. Figures for Amajuba have been derived from various sources which are described in the table, however, in many cases values could not be derived due to lack of information. An important function of the tourism division of Amajuba going forward, will be to gather the necessary information in order to form accurate indicators and targets. Suggested means of gathering this data have been suggested in the table.

Table 11 Baseline Indicators based on NTSS and KZN Master Plan indicators

Focus	Measure	National & Provincial baseline values (2009/10)	Amajuba baseline values (2010)	Source of indicator value
GDP	Direct GDP impact	National: R71,4 bn (3% of GDP) Provincial: R22bn	R53,3 mn (0.6% of district total GDP)	Based on values for catering & accommodation sector only (Quantec Regional Data, 2010)
	Direct & Indirect GDP impact	National: R189,4 bn (7,9% of GDP) Provincial: R33bn	100,6 mn	National Input-Output table (Urban-Econ, 2010)
Visitor Numbers	Foreign (holiday)	National total: 9 933 966	2009 visitors	Urban-Econ estimates based on TKZN number of visitors to the Battlefields
	Foreign (business)	Provincial total: 1 213 001	1339 visitors	
	Domestic (holiday)	National Total: 14 600 000	7900 visitors	
	Domestic (business)	Provincial Total: 8 800 000	31 600 visitors	
Employment	Direct	National: 389 100 Provincial: 100 000	1292	Employment in the catering & accommodation sector (Quantec regional data, 2010)
	Direct and Indirect	National: 919 800 Provincial: 133 000	1977	National Input-Output table (Urban-Econ, 2010)
Investment	Public	National: R82,4 bn	no baseline data available	Investment data can be gathered from building plans approved and amount spent on new tourism projects in Amajuba
	Private	no baseline data	no baseline data available	
	Foreign Direct	National: R3 bn	no baseline data available	
Transformation	No of companies with a BEE scorecard	no baseline data available	no baseline data available	It is recommended that this information is gathered through the CTO or that a survey is conducted annually
	No of companies with high level accreditation	no baseline data available	no baseline data available	
	Number of companies reaching tourism charter targets	no baseline data available	no baseline data available	





Focus	Measure	National & Provincial baseline values (2009/10)	Amajuba baseline values (2010)	Source of indicator value
	Number of black majority owned companies	no baseline data available	no baseline data available	
Rural Tourism demand	Number of visitors to rural businesses:	no baseline data available	no baseline data available	Information should be gathered at each rural attraction and accommodation place
	Number of attractions in rural areas:	no baseline data available	no baseline data available	Information to be gathered through CTO
Number of bed nights in low season months	Foreign	National: 15.80%	no baseline data available	Occupancy information needs to start to be gathered from every accommodation place in Amajuba
	Domestic	National: 5.30%	no baseline data available	
Visitor Experience	Number of visitors whose experience meets or exceeds their expectations	no baseline data available	no baseline data available	Service excellence survey, or customer satisfaction cards is necessary to gather this info.
Awareness	increased levels of awareness of tourism and its value	no baseline data available	no baseline data available	This can be assessed in future through surveys and also investment.
	Increase in levels of community participation	no baseline data available	no baseline data available	
Events & MICE market growth	Number of events > 1000 people	no baseline data available	no baseline data available	Requires district level co- ordination of events
	Economic Impact Assessment of Events	no baseline data available	no baseline data available	Requires economic impact surveys
	Number of meetings and conferences	no baseline data available	no baseline data available	Each conference venue to provide data
Niche Market Growth	Number of visitors per niche market	no baseline data available	no baseline data available	





SECTION 4: STRATEGY FORMULATION

The strategy formulation phase is the second phase of the Amajuba Tourism Strategy Review project. In this phase strategies and projects that will be a catalyst for tourism growth and development over the next 5 years are identified. These projects are a result of extensive consultation and research carried out in the first phase (the Contextual and Situational Analysis), as well as local municipality and district tourism workshops. The project and strategies chosen correspond to the findings of the situational analysis. They seek to take advantage of the opportunities and strengths of the area, as well as combat the challenges and weaknesses. The strategies are also derived from the KZN tourism Master Plan and are, therefore, aligned to this provincial strategy and the national strategy.

The next section briefly summarizes the findings of the situational analysis. The vision and strategy are then explored, along with project and project prioritization. An infrastructure investment framework and a detailed framework for the establishment of an efficient institutional system for the development and marketing of tourism in the district is provided.





VISION

The findings of the situational analysis illuminated the importance of the following themes for the tourism industry in Amajuba. These themes are aligned to the current market trends in Amajuba and came out strongly in statistical findings, interviews and workshops and, therefore, determined the approach taken in the strategy formulation.

- Increased demand
- MICE
- Niche tourism products
- Unity amongst tourism service providers
- Tourism awareness and sustainability

These themes form the base of the vision statement. This section describes why each of these themes is so important and how they affect the tourism strategy.

THE IMPORTANCE OF **INCREASING DEMAND**

The findings of the situational analysis showed that there is minimal demand for tourism attractions in Amajuba. There are 6 tourism routes that are clearly shown in a well-produced A4 brochure, each of them are signposted along the whole route with clear unique sign boards. However, the routes receive hardly any visitors. People who offer experiences along the Amajuba Bivane route have not received a single phone call in years. Similarly, most township service providers have not heard of or received visitors due to the township tourism route. Even the well marketed and well known Battlefields route receives very few visitors in Amajuba. Despite interesting and good quality attractions, such as the fishing lodges in Emadlangeni, Carnegie Art Gallery and historical museums, examples of low tourism demand are plentiful in Amajuba.

It seems, therefore, that building new tourism routes and attractions at this stage would be fruitless. The focus for the next five years should rather be on increasing demand for the existing tourism attractions, and building on the tourism markets that already exist in Amajuba. This can be achieved through improved tourism management, marketing and information distribution. In order to improve tourism management one needs to increase capacity, networking, and research and knowledge management. Marketing campaigns are essential in Amajuba as the image of Newcastle as a mining town is a constraint to tourism growth, and one of the biggest tourism assets – 'The town within a game park'- remains unknown to the majority. Information distribution is important for both tourists and service providers. Improving and expanding the methods by which information reaches tourists is vital. As mentioned, this marketing and information should be aimed at the existing markets and exploit the existing products for the first 5 years until demand is sufficient to build new attractions and reach new markets. The most successful tourism market in Amajuba presently is the MICE market.





THE IMPORTANCE OF **MEETINGS**, **CONFERENCES AND EVENTS**

Statistics found that the most overnight visitors received in Amajuba by an overwhelming amount were business tourists. Accommodation facilities reach over 80% occupancy during week days but go as low as 20% over weekends. This is largely due to the extent of economic activity that occurs in Newcastle, as well as its central location to Free State, Gauteng and KZN. It is important to market directly to this market segment who often have to stay over weekends and could increase the number of visitors to tourist attractions, making them more financially viable. These businessmen will then communicate their experience to friends, family and colleagues in surrounding provinces. Word of mouth is still the most valuable marketing tool. It is important that Newcastle takes advantage of its central location and is able to attract further meetings and conferences to the area. This requires meeting and conference venues, as well as accommodation, that is of a high quality and caters directly to the needs of businessmen. The current amount of business tourists creates opportunities in value adding and in the supply chain. This includes opportunities for outlying scenic areas to develop conference venues, for team building, for restaurants, conference entertainment, corporate gifts etc.

Data also showed that single day events attract far more people than most tourism attractions do over an entire year. This data was corroborated by consultation with service providers and tourism officials and students. Every single event, from 200 people to 40 000 people is important to Amajuba's economy because it exposes Amajuba's tourism assets and, given Amajuba's central location and population, even the smallest events attract people from outside of the district. Newcastle is the largest inland town in KZN, the impact of domestic events should, therefore, not be underestimated as it draws on a large population and area. Current events run by the museums, art galleries, local sporting clubs, the district, provincial departments etc. are already very successful. These events include regional sporting championships, national junior sporting competitions, various sporting events such as triathlons, art exhibitions, heritage events, music events, markets and Chinese cultural events. This also includes functions such as weddings which is a growing market in the area. This strategy should look to capitalise on this success by growing the events market.

THE IMPORTANCE OF NICHE ATTRACTIONS

Business tourism and events may attract the largest amount of visitors, but Amajuba is also rich in niche tourism products. Amajuba does not have a beach, it does not have a big 5 game reserve, nor does it have the most breathtaking scenery. It does, however, have a vibrant and active arts industry, several sites and buildings of historical importance, and it is rich in biodiversity leading to opportunities in avi-tourism and fishing. It also has the Drakensberg Foothills and Balele mountains which are good for adventure tourism; and shopping malls which attract out of district visitors. These niche markets should be given support so that they can reach their full potential. Fortunately, these niche markets are being driven by community members, tourism officials, CTOs and clubs. Basic infrastructure, maintenance and marketing from the district is vital over the next five years if these niche attractions are going to grow off the back of increased businessmen, events and people visiting friends and relatives. By the end of 2016 there should be sufficient demand to ensure that more intense investment into these niche attractions is feasible.





THE IMPORTANCE OF ACHIEVING UNITY AMONGST TOURISM STAKEHOLDERS

Throughout consultation it was made clear that all stakeholders need to take the future of tourism in Amajuba into their own hands, and develop a unified approach to promoting the entire district. Service providers should not expect and wait for government officials to provide marketing, investment etc. but should rather take responsibility and drive demand themselves. Similarly, public sector should not stand back from or be an obstacle to tourism growth and development. All service providers and officials from Newcastle, to townships and rural areas need to work together. A clear and well-functioning institutional structure is vital for this to occur. CTOs need to be formed in each of the local municipalities, and the district tourism forum needs to be supported and entrenched. Furthermore, networking needs to be forced through tourism events and workshops.

It is often mentioned that service providers 'cut of their nose to spite their face' by bickering with and putting down fellow service providers in the area. The success of tourism in Amajuba relies on service providers working towards one vision, having knowledge of all other products in the area, and recommending each other. Information brochures and maps should be handed out at each tourism product, with advice being passed to visitors by product owners. Previously disadvantaged product owners in the townships should be given special preference. Long standing tourism businesses should mentor these new businesses and their involvement on the CTO is essential. It is only through this spirit of togetherness that stakeholders can learn from each other, give each other support and achieve success.

THE IMPORTANCE OF TOURISM AWARENESS AND SUSTAINABILITY

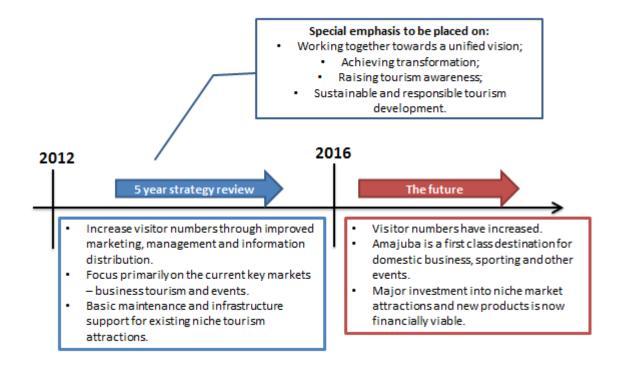
Through consultation it became clear that members of the community do not properly understand what tourism means, and how it can benefit the area. A lot of people have a glorified perception of the tourism industry and do not realize that jobs in the industry are most likely going to start as kitchen hands, waiters, cleaners, hosts, receptionists etc. Some people also have a narrow idea of what tourism is. They think that tourism is only B&Bs and the beach. They don't realize that tourism can even be made of agriculture, and that everything from transport to shopping malls is a part of it.

The misconception that tourism will not lead to economic development or job creation is not limited to the community, but is shared even by government officials and counselors. It is essential that awareness of the benefits of tourism is raised. This is particularly important in Amajuba where coal mining threatens to destroy the biodiversity and beauty of Balele in Emadlangeni; as well as the valley that leads to the Drakensberg foothills. Research needs to be conducted to determine the long term benefits of tourism as opposed to coal mining which is only short lived. Ecological concepts are becoming a large part of tourism development and it is important that Amajuba is educated in such things.





SUMMARY OF THE STRATEGIC APPROACH



VISION

'It is our vision that, in 5 years, the number of visitors to Amajuba will have increased tenfold. This will be achieved through effective tourism management, marketing and information distribution.

Amajuba will become a first class destination for meetings, conferences and events by building further on the strengths of the existing tourism market.

A variety of quality heritage, arts & culture, and nature based tourism products will attract niche markets, business men, and visiting friends and relatives.

It is our vision that the public and private tourism role players will work together to realise this vision which will benefit the whole area and community, and that transformation will take place.

Increased tourism awareness will lead to community and political buy-in and everyone will be involved in growing a responsible and sustainable tourism industry in Amajuba.'





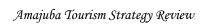
STRATEGY

The strategy follows on from the strategic approach and vision, as mentioned in the previous section. The strategic approach was determined by the findings of the situational analysis. The framework of the KZN Master Plan was also considered when deriving the strategy in order to achieve proper alignment to the provincial strategy. The following strategic clusters are used in the KZN Master Plan:



This strategy draws directly on these 'strategic clusters' but includes 3 or 4 unique 'strategic thrusts' under each 'strategic cluster'. Each 'strategic thrust' has several projects that correspond with it. The strategic clusters and thrusts are as follows:

- 1. Marketing tourism growth & development (demand)
 - 1.1) Market Amajuba's strength: Meetings, Incentives, Conferences and Events
 - 1.2) Expand and improve tourism information outlets and tools
 - 1.3) Branding and route development
- 2. Product Development and Planning
 - 2.1) Meetings, conferences and events product development
 - 2.2) Heritage, avi-tourism and nature based tourism product development
 - 2.3) Other niche markets, accommodation and recreational product development
 - 2.4) Infrastructure and support services development







- 3. People in tourism (Human Resource Development & Service Excellence)
 - 3.1) Ensure quality experiences through service excellence
 - 3.2) Ensure transformation in the tourism industry
 - 3.3) Increase tourism awareness
- 4. Policy, strategy, governance, research & knowledge management, monitoring & evaluation
 - 4.1) Improve tourism management through institutional and policy arrangement
 - 4.2) Improve tourism management through improved research and knowledge management
 - 4.3) Entrench responsible tourism principles

The following sections describe each of these 'strategic clusters', their 'strategic thrusts' and the projects that fall under each of the 'strategic thrusts'.





STRATEGIC CLUSTER 1) MARKETING - TOURISM GROWTH & DEVELOPMENT (DEMAND)

The primary objective is to grow visitor numbers to Amajuba. This is the main reason behind any and all marketing activity. Amajuba is in a difficult situation as it cannot compare to other districts in KZN when it comes to tourism attractions. There is no beach, no big 5 game reserve, no mountains that can compete with the likes of the Drakensberg, and the heritage that does exist cannot compare to Zululand, or even uThukela. Furthermore, the current image of Newcastle and Dannhauser are that they are mining towns and that there is nothing to do there. Emadlangeni remains largely unknown. This all leads to low demand for tourism activities and products that do exist in the area which is leading to the few interesting and worth-while attraction shutting down. It is, therefore, vital for the future of tourism in Amajuba that marketing is heavily increased and cleverly implemented so as to increase demand. This is the most important strategic cluster, because without demand, there is very little product development that will be successful.

The 'strategic thrusts' under this heading are:

- 1.1) Market Amajuba's strength: Meetings, Incentives, Conferences and Events
- 1.2) Expand and improve tourism information outlets and tools
- 1.3) Branding and route development

1.1) MARKET AMAJUBA'S STRENGTH: MEETINGS, INCENTIVES, CONFERENCES AND EVENTS

It has become clear that business tourism and events bring the most visitors into Amajuba. Visitors come mostly from the surrounding provinces (Gauteng and Free State), and from within KwaZulu-Natal. There are also a few international visitors who spend time in Amajuba for work purposes. This is the existing market and it is, therefore, the market segment that should be targeted first so that the district works with current market trends, rather than against them. The scope for events is large and includes mostly inter-provincial and regional events. Included in this category is school events and tour groups, junior sporting events, local club events, arts and historical events, cultural events, local shopping events and music events. Amajuba is not trying to compete with large hotels and resorts for international conferences and events, but due to its central location it is very well placed to take advantage of domestic events which may be smaller but still attract many more visitors than would ordinarily spend money and time in Amajuba on tourism related activities.

The following projects describe ways in which marketing to business visitors and for events can be implemented to increase the number of visitors to Amajuba, and to improve the scope and demand for other tourism products.

1.1.1) Develop tourism packages and incentives targeted at businesses, schools, sports associations and clubs.

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- 1.1.2) Produce an information brochure specifically for MICE venues that includes support services such as DJs, speakers, catering, Zulu dancers, security services etc.
- 1.1.3) Promote MICE venues and packages in businesses and government in and outside of Amajuba.
- 1.1.4) Put together an information welcome pack for local businesses to give to visiting businessmen; and promote tourism products at these businesses; hold business networking events.
- 1.1.5) Compile a calendar of events and a 'what's on' quarterly brochure.
- 1.1.6) Ensure that large events are advertised on all forms of media, reaching surrounding provinces and KZN
- 1.1.7) Use celebrities from Newcastle as ambassadors.
- 1.1.8) Undertake detailed market research to profile the tourism visitors better and inform the marketing strategy
- 1.1.9) Ensure that conference centres are registered with SAACI (South African Association for the conference industry) and PCO alliance industry); sponsor conference facilities presence at 'Meetings Africa' and 'Tourism Indaba'.

1.2) EXPAND AND IMPROVE TOURISM INFORMATION OUTLETS AND TOOLS

Demand will only increase if visitors receive appropriate information. Currently the majority of information outlets and tools within Amajuba are not effective. The tourism information centre in Newcastle is hidden in the centre of town and receives very few visitors. The tourism information centre in Utrecht has shut down. The major source of marketing attractions is via brochures which hardly ever actually get to the market. Websites are poorly maintained and are often down. Service providers have little knowledge of other products in the area. The previous strategy suggested projects that would get information to Amajuba's key market segments - business men, schools and sports clubs. This strategy adds on those projects by suggesting projects that will help to get information to the general public. Both strategies are necessary to improve information distribution and create awareness of the tourism products that exist.

- 1.2.1) Relocate and refurbish the tourism info centre in Newcastle and Utrecht, with satellite stations at waterside Wimpy and shopping malls.
- 1.2.2) Identify and cultivate relationships with up to 10 major advertising outlets that fall across all types of media, throughout KZN and Gauteng.
- 1.2.3) Contract web designers to design and maintain an Amajuba Experience type website, and similarly to develop and maintain current municipal websites. Launch a social media marketing program.
- 1.2.4) Provide support and encourage private sector and students to build websites in order to increase Amajuba's online presence; support development of the BLNN website.

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- 1.2.5) Empower and encourage service providers to act as 'information centres' in themselves
- 1.2.6) Involve businesses and chambers in tourism information collation and distribution.
- 1.2.7) Investigate short films, music, arts and travelling theatre as a way to market Amajuba's culture and heritage.
- 1.2.8) Link up with surrounding towns in order to develop mutually beneficial marketing strategies e.g Wakkerstroom
- 1.2.9) Market tourism attractions at stop and gos across Amajuba.

1.3) BRANDING AND ROUTE DEVELOPMENT

Strategies 1.1 and 1.2 discussed the means by which information should be distributed. This strategy suggests branding that would appeal to visitors and be effective. Currently branding centres around the Battlefields and the 6 Amajuba Routes. This strategy suggests moving away from Battlefields only branding, towards a more comprehensive package. It also suggests getting product owners along each of the current routes more involved so that the routes can be more successful. It is important that branding and marketing focusses on the existing routes and attractions. It would even help add to the success of these routes if local people became interested. The most important thing is that numbers are visiting the attractions and routes, at first, marketing should be aimed at everyone – even if they are local. This allows the routes to be financially viable and creates vital awareness of tourism attractions. The following projects aim to increase the appeal of Amajuba's attractions through effective branding.

- 1.3.1) Create and develop a new, unique brand for Amajuba.
- 1.3.2) Obtain buy in from service providers on each of the current routes, and hand over ownership of these routes. Collaborate with Open Africa in order to revitilise the current 5 routes.
- 1.3.3) Consider branding of the N11 as an arts and music route, in conjunction with uThukela.
- 1.3.4) Update the Amajuba Routes brochure, and include more product information for each route, as well as the Freedom Route
- 1.3.5) Identify roles and responsibilities of private sector, public sector, local and district municipalities, and TKZN and determine a process that ensures unified branding and marketing.
- 1.3.6) Implement a 'Being a tourist in your town' campaign promote weekend activities especially.





- 1.3.7) Devise and implement a strategy to turnaround Newcastle's image as a mining town using art, culture and music as a base.
- 1.3.8) Create awareness of 'The town within a game park' for Utrecht.

STRATEGIC CLUSTER 2) PRODUCT DEVELOPMENT AND PLANNING

This strategic cluster provides projects that aim to develop existing and new tourism attractions and other products such as recreational products and accommodation. It also provides projects to do with planning – this includes infrastructure and support services. Similar to the first strategic cluster (marketing), the focus will remain on meetings, conferences and events. That is, business tourism and events. Amajuba also shows potential is several niche markets – those are heritage, arts & culture, nature-based, adventure and sports tourism, avi-tourism, and others. Developing products in these niche markets is vital for the future of tourism in Amajuba. It does not seem viable, given the low demand for existing niche products, that new tourism products be developed in the short term. Investment in tourism should rather focus on the current successful market of events and functions. It is essential, however, that the existing niche products be properly maintained and given the support required to grow themselves.

The 'strategic thrusts' under this heading are:

- 2.1) Meetings, conferences and events product development
- 2.2) Heritage, avi-tourism and nature based tourism product development
- 2.3) Other niche markets, accommodation and recreational product development
- 2.4) Infrastructure and support services development

2.1) MEETINGS, CONFERENCES AND EVENTS PRODUCT DEVELOPMENT

Currently, there is a thriving events, meeting and functions industry in Amajuba. It is important that Amajuba take advantage of this by developing current products and introducing new products. Opportunities exist for new events aimed at the black middle class market segment, as well as the shopping market. Functions such as weddings and funerals bring several thousand visitors to Newcastle a year – function halls that accommodate these better would serve to attract further visitors as many weddings, especially, are being lost to surrounding areas. Perhaps most important is that proper co-ordination of events takes place. Many sporting clubs require funding to hold events – a system whereby events get a tiered amount of funds for the first three years and then are expected to be self-sustaining is necessary.

2.1.1) Establish team building packages and products in the Drakensberg Foothills and Utrecht.





- 2.1.2) Establish a district events calendar procurement/funding strategy in order to manage and co-ordinate events.
- 2.1.3) Introduce a weekly flea-market/food-market event run by community members in Utrecht.
- 2.1.4) Start a monthly 'late night shopping experience' every month end at the new mall where shop owners offer promotional deals etc. Incorporate chinese stores and local crafters outdoors.
- 2.1.5) Promote wedding venues and packages
- 2.1.6) Encourage 'business friendly' accommodation standards, including wifi, workspace etc.
- 2.1.7) Offer transport by helicopter to businesses.
- 2.1.8) Establish a large event hall.
- 2.1.9) Co-ordinate, promote and provide adequate infrastructure for regular music and other events at Armsco dam.
- 2.1.10) Support the Department of Arts and Culture in promotion of the Amajuba Rainbow show and Amajuba Community Arts Festival.
- 2.1.11) Establish an ecologically friendly conference centre that hosts 'conscious conferences' outside of Newcastle in the scenic areas of the Drakensberg Foothills, Balele, or Chelmsford.

2.2) HERITAGE, AVI-TOURISM AND NATURE BASED TOURISM PRODUCT DEVELOPMENT

Niche tourism products in Amajuba hold great potential; however, there is little demand at present. It is important that niche tourism products are brought up to a good standard and that they are accessible to the general traveler who isn't necessarily on holiday, but rather visiting friends and relatives or there for work purposes. Currently, the majority of products is not maintained properly or is underdeveloped. Battlefields sites are some of the most popular attractions in Amajuba, however, they are poorly maintained and are not accessible due to key infrastructure not being built or due to the fact that they fall on private land. Avi-tourism is only just taking off and requires bird watching infrastructure to get off the ground. There are scenic areas in Amajuba such as Balele, Chelmsford, Ncandu Forrest and the Drakensberg Foothills. These need to be further developed with picnic and camping sites, as well as trails. The following projects describe ways to develop these attractions and make them more accessible. This needs to be done in conjunction with the marketing strategies mentioned already in order to increase demand.

Heritage Tourism



- 2.2.1) Heritage: Identify San rock art in Utrecht and Ncandu and smelting sites, and negotiate protection for the sites before promotion.
- 2.2.2) Heritage: Transform Majuba Mountain into a 'must see' quality experience (consider feasibility of national war museum on mountain, and yearly major event)
- 2.2.3) Heritage: Implement findings of the SiVest 2005 Battlefields infrastructure upgrade plan, including maintenance agreement. Solve access problems surrounding land ownership.
- 2.2.4) Heritage: Open all museums and art galleries on the weekend.
- 2.2.5) Heritage: Investigate Zulu Heritage products especially tribal heritage in Dannhauser.
- 2.2.6) Heritage: Establish a 'Religious Route' (including missions in the area) and include Gandhi related products.
- 2.2.7) Heritage: Establish a 'Ghost Route'
- 2.1.8) Heritage: Facilitate community driven walking tours in Newcastle and Utrecht that cover all the historical buildings in town.

Avi-tourism

- 2.2.9) Avi-Tourism: Identify and install birding infrastructure in 3 or 4 birding hot spots across Amajuba.
- 2.2.10) Avi-Tourism: Implement an avi-tourism promotion campaign across all media with the help of BLSA. Identify and include 'Birder Friendly Establishments' and BLNN routes in this campaign.*
- 2.2.11) Avi-Tourism: Establish annual weekend events in Jan/Feb around the Amure Falcon and Barn swallow roosts and Bald Ibises.

Nature based tourism

- 2.2.12) Nature based tourism: Amajuba dams revitilisation project.
- 2.2.13) Nature Tourism: Develop Ncandu Forrest into a functioning tourism product and promote.
- 2.3.14) Nature based tourism: Provide exposure and signage to service providers in the Drakensberg foothills.
- 2.1.15) Nature based tourism: Start a volunteer program centred on conservation in Emadlangeni.





2.3) OTHER NICHE MARKETS AND RECREATIONAL PRODUCT DEVELOPMENT

The abovementioned niche attractions are not the only ones that hold potential. There is a significant arts and culture market in Amajuba, with artists producing unique work of a high standard. Arts and culture has the potential to turn Newcastle and Dannhauser's image around. It is especially important the Carnegie Art Gallery is given the space and support needed to carry out events, and support the community. Due to the scenic areas and biodiversity, adventure and sports tourism can grow. Throughout the research process it became clear that Amajuba desperately needs recreational activities, particularly for children and families. This is an important support service for tourism. The following projects aim to increase the number and variety of attractions available to visitors.

Arts & Culture

- 2.3.1) Arts & Culture: Develop a tourism product surrounding Lucky Dube and his grave site.
- 2.3.2) Arts, Culture & Shopping: Collaborate with the Chinese Business Chamber in order to develop and promote tourism products based on the Chinese Culture. Produce a map of Chinese Factory shops.
- 2.3.3) Arts&Culture: Relocate and expand Carnegie Art Gallery premises.

Adventure tourism

- 2.3.4) Adventure Tourism: Develop adventure tourism products at Chelmsford, Ncandu and in the Drakensberg foothills and Balele Mountains.
- 2.3.5) Adventure Tourism: Negotiate using one of the mountain passes for a 4by4 trail it would need to have open access, with permission of the land owner.

Sports tourism

- 2.3.6) Sports Tourism: Investigate the feasibility of introducing game for hunting in traditional areas with the help of local farmers who already offer hunting.
- 2.3.7) Sports tourism: Package and promote fishing products across Amajuba, include events.
- 2.3.8) Sports tourism: Attract one (increasing each year) equestrian event to Newcastle. Build a 'bush racing' track, and promote regular events.

Recreation

- 2.3.9) Recreation: Formulate a strategy for the development of recreational activities in Amajuba.
- 2.3.10) Recreation: Encourage the development of the Bike Park in Newcastle (Business Plan already in place)

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2.3.11) Recreation: Investigate the safety requirements of the OSSHACT and the Mines and Works Act in order to develop a theme park in Dannhauser - potentially at the old Durnacol mine site that includes mine tours.

Other

- 2.3.12) Shopping tourism: Attract antique arts and crafts and other small 'home industry' type shops to Utrecht and Dannhauser.
- 2.3.13) Township Tourism: Develop tourism products along the township tourism route, using other successful models as a guide.
- 2.3.14) Agri-Tourism: Develop agri-tourism products

2.4) INFRASTRUCTURE AND SUPPORT SERVICES DEVELOPMENT

In order for tourism to function effectively, certain infrastructure needs to be in place. Public sports infrastructure is particularly important as this is necessary to attract large sporting events; such infrastructure includes the public swimming pool and golf course. Transport infrastructure is also particularly important. Major roads are currently being upgraded by the department of transport. These upgrades are going to take place over the next 4 years. This is necessary but will constrain access to Amajuba considerably. This needs to be taken into account during implementation of this strategy. The airport is currently under investigation by the department of economic development and tourism – targets will be set out by the department for improvement and expansion of the airport. This is vital for the future of Amajuba. Coal mining is a major threat to tourism in the area, particularly in Emadlangeni and the D96 valley. As a support function, tourism officials need to get involved in this process. Further infrastructure and support services functions and projects are outlined below.

- 2.4.1) Ensure that all municipal owned sports infrastructure is properly maintained and up to national standards.
- 2.4.2) Lobby for grants from provincial treasury for upgrade of Newcastle Airport, in conjunction with LED and Newcastle LM.
- 2.4.3) Facilitate collaboration between DOT KZN and DOT Free State to fix the R34 via Vrede.
- 2.4.4) Introduce transport options, especially between Newcastle and outlying tourism products.
- 2.4.5) Investigate the benefits of the train system to tourism.
- 2.4.6) Improve police visibility at events and tourists attractions.
- 2.4.7) Provide knowledge and incentives to increase accessibility across all tourism products.
- 2.4.8) Small town rehabilitation of both Utrecht and Dannhauser.





- 2.4.9) Facilitate negotiations between stakeholders regarding planned coal mining earmarked for Amajuba (especially Emadlangeni).
- 2.4.10) Train birding and heritage guides.
- 2.4.11) Establish budget and backpacker accommodation.
- 2.4.12) Improve signage in townships and along main roads (N11 and N3), and stop illegal signage in Newcastle. (Refer SADEC Road Traffic Sign Manual)

STRATEGIC CLUSTER 3) PEOPLE IN TOURISM

People are at the front line of tourism and they often form a big part of the impression that is formed by tourists. For this reason it is important that people in the hospitality and tourism industry are properly trained and that standards and monitoring are in place to ensure service excellence. It is also important that all officials and community members rally around the industry. Without the continued support of councilors, municipal staff, and the business and general community it will not be possible for the industry to reach its full potential. Support can be gained through creating awareness of the importance and benefits of tourism with regard to sustainability, job creation and community upliftment. People need to understand that jobs are created throughout the hospitality chain, from transport to information management, cleaners, caterers, crafts etc. etc. It is also important because, unlike most other economic activity, it is sustainable and does not harm the environment. Certain interventions need to take place for transformation in the tourism industry to take place. People who were previously disadvantaged need to form part of the growth and development of tourism and receive the resulting benefits. The following strategies and projects describe how to achieve this transformation, create awareness and improve service excellence.

The 'strategic thrusts' under this heading are:

- 3.1) Ensure quality experiences through service excellence
- 3.2) Ensure transformation in the tourism industry
- 3.3) Increase tourism awareness

3.1) ENSURE QUALITY EXPERIENCES THROUGH SERVICE EXCELLENCE

There is little point creating demand and improving the quality and variety of attractions if service is poor. Visitors often stay in accommodation and the service they receive adds significantly to their experience. This is true also of information centres and staff in restaurants and reception desks of tourist attractions. Currently, service is not being properly monitored in Amajuba so it is difficult to gage the standard. It is important that a uniform measure of excellence is in place and that this is monitored regularly. Training is also an important part of achieving service excellence. Ensuring that there are no barriers to tourism products is also important. This means that products should be open and accessible. This is especially important for accessibility challenged travelers. Measures

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should be in place and incentives should be in place for products to increase accessibility. The following projects suggest ways in which service excellence can be improved in Amajuba.

- 3.1.1) Improve access to tourism products for accessibility challenged visitors.
- 3.1.2) Identify one national tourism grading standard, conduct grading of all service providers to obtain baseline, provide guidelines, and monitor yearly improvements.
- 3.1.3) Sponsor training programs in service excellence for current employees.
- 3.1.4) Launch a yearly awards ceremony recognizing excellence in tourism.
- 3.1.5) Capacity building programs for Municipalities, CTOs & industry associations
- 3.1.6) Implement service standards at tourism information centres with consequences for not meeting standards.
- 3.1.7) Establish a nuanced & accessible customer feedback system
- 3.1.8) Develop & run regular media projects/campaigns to highlight & profile service excellence

3.2) ENSURE TRANSFORMATION IN THE TOURISM INDUSTRY

Transformation is a key goal in South Africa that trickles down through all the spheres of government. It is each sector's responsibility to ensure that economic activity benefits the poor. There are still large steps that need to be taken in Amajuba for transformation to take place. Service providers in the townships are struggling, crafters and artists do not receive sufficient demand to make a living, despite the fact that new centres and craft groups are constantly being given support by government. It is vital that previously disadvantaged groups are given the support to link up with the current market segments and economic activity taking place. This means that they need to be incorporated into the business tourism supply chain. Successful businesses need to mentor younger businesses and all businesses need to be monitored for the correct implementation of BEE. The following projects are suggested to aid the transformation process.

- 3.2.1) Conduct a baseline study on state of tourism transformation in Amajuba.
- 3.2.2) Formulate an industry transformation strategy.
- 3.2.3) Ensure ongoing business support for SMMEs
- 3.2.4) Promote compliance with Tourism B-BBEE Sector Code
- 3.2.5) Continue and expand the tourism ambassadors program.
- 3.2.6) Include under privileged people in the business tourism supply chain through entertainment, catering and, crafting of corporate gifts.

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- 3.2.7) Establish permanent crafters stalls at tourism nodes/sites and make provision for crafters at events, as well as establishing regular crafting events.
- 3.2.8) Determine marketing strategies and packages that will connect tourists with the Osizweni Arts Centre.

3.3) INCREASE TOURISM AWARENESS

It is important that the tourism industry receives buy in from the community and from government official in order to function effectively. Better understanding of how tourism operates, including the entire supply chain and opportunities for value adding, is vital. All channels of communication such as the media, schools and even road shows need to create understanding and form links into the industry. The following projects aim to increase tourism awareness.

- 3.3.1) Improve tourism & hospitality career choice perception & career information for school learners in collaboration with schools, post-grad institutions and the tourism information centre.
- 3.3.2) Explaining, lobbying & prioritising the tourism industry with politicians & government officials. Particularly the benefits of sustainability.
- 3.3.3) Develop programs to improve tourism awareness & understanding amongst learners, students, the media and communities.

STRATEGIC CLUSTER 4) POLICY, STRATEGY, GOVERNANCE, RESEARCH & KNOWLEDGE MANAGEMENT MONITORING & EVALUATION

This strategic cluster looks at the effect that governance has on the tourism industry. It deals with by-laws, institutional structures, staffing, and responsibilities throughout the tears of government. It also deals with research and knowledge management which is currently not taking place in Amajuba. This cluster also deals with responsible and green tourism principles. Tourism activity must not damage the environment, but rather enhance the natural environment. It should also respect the cultures and communities in which the tourism activities are taking place. The following strategies outline these concepts.

The 'strategic thrusts' under this heading are:

- 4.1) Improve tourism management through institutional and policy arrangement
- 4.2) Improve tourism management through improved research and knowledge management
- 4.3) Entrench responsible tourism principles





4.1) IMPROVE TOURISM MANAGEMENT THROUGH INSTITUTIONAL AND POLICY ARRANGEMENT

Currently there is insufficient capacity for tourism in Emadlangeni and Dannhauser and there are no official CTOs, although Emadlangeni has formed unofficially, and Newcastle is in the process of forming their CTO. There are no tourism related by-laws being enforced in Dannhauser or in Emadlangeni. Furthermore the Amajuba Tourism Forum is not operating as effectively as it should due to a lack of consistency in funding and meetings. There are a wide variety of tourism bodies in the public sector that have subtle and overlapping responsibilities and often much is lost between the cracks of these organisations. One example of this is the maintenance and upgrade of heritage sites which falls under the responsibility of Amafa and the local and district municipalities. Another example is arts and culture institutions which fall under arts and culture and, therefore, are separated from the tourism function. It is important that proper communication and co-ordination takes place between the different bodies. Communication also needs to take place with the product owners who in many cases feel that their needs are not being attended to. The following projects attempt to combat these challenges.

- 4.1.1) Increase local municipality tourism budgets significantly, and review the district tourism budget and lobby for a dedicated tourism official at Dannhauser and Utrecht local municipalities.
- 4.1.2) Establish CTO's in Dannhauser, Utrecht and Newcastle local municipalities.
- 4.1.3) Ensure that rolls are clearly defined between the DMs and LMs and the public and private sectors as per the KZN Tourism Strategy and that all stakeholders are informed, with special attention paid to the autonomy of CTOs
- 4.1.4) Ensure the active involvement of all tourism related bodies e.g. EKZNW, Amafa etc. into the Amajuba Tourism Forum.
- 4.1.5) Identify bureaucratic challenges and obstacles to tourism developments & address these.
- 4.1.6) Help desk to handle queries & complaints at tourism information centre.
- 4.1.7) Review tourism by-laws at all three local municipalities and form a district framework.
- 4.1.8) Launch a tourism investment promotion strategy.
- 4.1.9) Consider starting a quarterly tourism workshop.
- 4.1.10) Develop and fast track policies on Municipal Outdoor Advertisement Policies. This will assist with exposure and marketing of local tourism businesses. (Signage)
- 4.1.11) Set up a procedure that will guarantee constant communication and co-ordination between the department of arts and culture (museums and arts attractions) and the tourism function at each tier of local government.





4.2) IMPROVE TOURISM MANAGEMENT THROUGH IMPROVED RESEARCH AND KNOWLEDGE MANAGEMENT

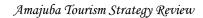
Research and knowledge management is not taking place in Amajuba, although Newcastle LM is starting to conduct surveys of travelers at stop and go's on the N11. This is largely due to a lack of capacity. In order to measure whether targets are being reached or even whether the industry is growing or receding, monitoring and research must take place to establish the numbers of products and visitors, as well as the economic impact of events. It is important this function is added to the KPIs of tourism officials and that they are given the appropriate interns (for example) and funds to achieve this. In a way, this function is more important than any other because it evaluates success. There is little point in conducting expensive marketing when there is no way to measure if it has made any difference. It is vital that research takes place in order to improve and inform tourism strategies going forward.

- 4.2.1) Agree on and implement institutional responsibility & capacity for research & information
- 4.2.2) Conduct research in order to understand Amajuba's current tourism market segments, and the economic impact of all tourism products, including events.
- 4.2.3) Define funds for the research and identification of new tourism products and packages.
- 4.2.4) Create a dataset outlining tourism services in the District (attraction type i.e. restaurant seafood, a la carte menu) Number of beds per establishment and total number of beds within each Local Municipal area.

4.3) ENTRENCH RESPONSIBLE TOURISM PRINCIPLES

As with any economic activity, it is important that tourism activities are carried out responsibly. There should be utmost respect for the environment and for communities. San rock art and tools have been discovered in Emadlangeni and Ncandu forest – it is responsible to efficiently organize protection for sites of such importance. This is true of all heritage sites. Eco-friendly development is vital if the tourism industry is going to be sustainable. Currently there is little information and incentives available for service providers and tourists to understand the importance and benefits of responsible tourism. The following projects aim to create awareness of responsible tourism principles and to provide incentives for respectful tourism development.

- 4.3.1) Ensure that green principles are incorporated into tourism developments through providing incentives and creating awarenes.*
- 4.3.2) Create visitor awareness of responsible behavior in communities & the environment







- 4.3.3) Awareness & capacity-building on responsible tourism for government tourism officials & tourism marketing organizations
- 4.3.4) Provide support to tourism businesses & communities to implement responsible tourism
- 4.3.5) Actively seek out protection for environmentally and historically important sites.

PROJECT PRIORITISATION

The strategies and projects in the previous section were taken to a district workshop at which attendees were asked to edit and prioritise projects according to which they thought were most urgent and important for tourism in Amajuba. Attendees were asked to choose 5 projects per strategic cluster. The projects chosen in the workshop acted as a guide for the prioritization of projects. The following criteria were considered at the workshop, and afterwards, when choosing priority projects.

CRITERION 1: ECONOMIC IMPACT AND STRATEGIC IMPORTANCE FOR THE TOURISM SECTOR

CRITERION 2: SKILLS DEVELOPMENT AND EMPLOYMENT CREATION

CRITERION 3: INDUSTRY TRANSFORMATION AND SMME DEVELOPMENT/SUPPORT

CRITFRION 4: LFD AND POTFNTIAL ANCHOR PROJECTS

Based on these criteria, the following 20 projects were established as priority projects:

1) Marketing – tourism growth & development (demand)

- 1.1.1) Develop tourism packages and incentives targeted at businesses, schools, sports associations and clubs.
- 1.1.3) Promote MICE venues and packages in businesses and government in and outside of Amajuba.
- 1.2.1) Relocate and refurbish the tourism info centre in Newcastle and Utrecht, with satellite stations at waterside Wimpy and shopping malls.
- 1.2.3) Contract web designers to design and maintain an Amajuba Experience type website, and similarly to develop and maintain current municipal websites. Launch a social media marketing program.
- 1.3.1) Create and develop a new, unique brand for Amajuba.

2) Product Development and Planning

- 2.1.2) Establish a district events calendar procurement/funding strategy in order to manage and co-ordinate events.
- 2.2.3) Heritage: Implement findings of the SiVest 2005 Battlefields infrastructure upgrade plan, including maintenance agreement. Solve access problems surrounding land ownership.
- 2.2.12) Amajuba dams revitilisation project.





- 2.3.3) Arts&Culture: Relocate and expand Carnegie Art Gallery premises.
- 2.4.2) Lobby for grants from provincial treasury for upgrade of Newcastle Airport, in conjunction with LED and Newcastle LM.

3) People in tourism

- 3.1.1) Improve access to tourism products for accessibility challenged visitors.
- 3.1.2) Identify one national tourism grading standard, conduct grading of all service providers to obtain baseline, provide guidelines, and monitor yearly improvements.
- 3.2.3) Ensure ongoing business support for SMMEs
- 3.2.7) Establish permanent crafters stalls at tourism nodes/sites and make provision for crafters at events, as well as establishing regular crafting events.
- 3.3.3) Develop programs to improve tourism awareness & understanding amongst learners, students, the media and communities.

4) Policy, strategy, governance, research & knowledge management monitoring & evaluation

- 4.1.1) Increase local municipality tourism budgets significantly, and review the district tourism budget and lobby for a dedicated tourism official at Dannhauser and Utrecht local municipalities.
- 4.1.2) Establish CTO's in Dannhauser, Utrecht and Newcastle local municipalities.
- 4.1.7) Review tourism by-laws at all three local municipalities and form a district framework.
- 4.2.2) Conduct research in order to understand Amajuba's current tourism market segments, and the economic impact of all tourism products, including events.
- 4.3.1) Ensure that green principles are incorporated into tourism developments through providing incentives and creating awareness.





INFRASTRUCTURE INVESTMENT FRAMEWORK

The following describes infrastructure investment that is necessary to support tourism development in Amajuba. This includes transport networks – roads, airports and rail, as well as necessary investment into ICT, town infrastructure and signage.

ROAD NETWORKS

The road network that connects Amajuba to the rest of KZN and South Africa should be an advantage. The N11 is a national road that runs throughout the district and there are several gateways into KZN on the border of Amajuba. However, throughout interviews and surveys, roads came up as a barrier to tourism in Amajuba. The following list from the Department of Transport summarizes the current status of road upgrades:

- 7. N11 Newcastle to Volksrust roadworks proposed completion May 2012.
- 8. N11 Newcastle to Ladysmith roadworks phased completion 2014.
- 9. R34 P211, P37, P41 Memel Utrecht- Vryhied Phased roadworks anticipated completion 2014.
- 10. R621 P39, P209, P210, P35/2 Phased roadworks anticipated completion 2013
- 11. R33 P34/2 Phased roadworks anticipated completion 2013
- 12. D 96 PPP Dunblane development anticipated completion date 2013

The most important of these upgrades is the N11 – from Ladysmith, as well as the R34 from Memel through to Vryheid. These are only due for completion in 2014 and cause major accessibility problems for Amajuba. It is necessary for the Department of Transport in Amajuba to discuss the upgrade of the R34 with officials from across the border in the Free State to ensure that the R34 is in a good state along the whole route from Johannesburg.

RAIL

Amajuba has a good rail network that connects it with Durban, Richards Bay and JHB. There is also talk of a bullet train from JHB to Durban via Newcastle. The advantage of the current rail system to tourism in Amajuba needs to be further investigated. National government plans to invest large amount of money into passenger rail networks – this needs to be tapped into.

NEWCASTLE AIRPORT

The Newcastle landing strip has the opportunity to become an airport. Currently, DEDT are conducting a provincial airports plan that will see funding distributed over a period of years to prioritized airports in order to upgrade the sites. It is the intention in province that airports throughout the province are operating and that small airlines conduct flights between these airports. Newcastle, being one of 4 secondary nodes in the province, being 4 hours away from the nearest airports in Durban and Gauteng, and already having a fairly high standard landing strip, is in line to receive funding to transform the airport. The study will outline management structures and standards that airports will need to adhere to. This should be monitored. It is important that





Amajuba and Newcastle officials rally behind this cause as it will be a major boost for tourism in Amajuba.

The following is an excerpt from the Draft Status Quo, Municipal Airports Project by the School of Development Studies (UKZN) On behalf of DEDT. A detailed description is included in the annexure.

Predominant Use/Activity: General aviation

Catalytic Potential: Newcastle Airport at current is functioning sub-optimally in relation to the level of regional economy diversification and scale of regional market catchment. Newcastle municipality is the fourth largest GDP contributor in the province and boasts the second largest municipality in population. There are a host of significant heavy and light manufacturing industries in Newcastle, in addition to comprising competitive agricultural and tourism sectors. There is significant potential for Newcastle Airport to be utilised as a regional and provincial aeronautical catalyst in both the manufacturing and agri-export sectors.

Threat(s): The current lack of strategic utilisation of Newcastle Airport as feeder for goods and services, especially within the context of a significant diversified manufacturing sector, can be seen as significant transaction cost imposed on resident industry, impacting especially on the competiveness of time-sensitive economic sectors⁸.

A more detailed analysis of the investment needs for the airport is included in the annexure of the situational analysis report.

SMALL TOWN REHABILITATION

Both Dannhauser and Utrecht are in desperate need of rehabilitation. The shop fronts, particularly in Dannhauser are broken and have not been painted. Utrecht has one main street, with some historical buildings, such as the town hall along it. Other shops should be made to fall in line with the historical feel of the town. In both towns there are problems with roads, road lanes, pavements and water systems. It is vital that these towns are given a facelift in order for them to appeal to tourists.

INFORMATION COMMUNICATION TECHNOLOGY

Internet and telephone signal is particularly poor in Emadlangeni and the Drakensberg Foothills which makes booking in at tourism attractions and accommodation particularly difficult. Furthermore, telephones and internet are often down at other public attractions such as the information centre and the museums. It is essential that investment is made into ICT, especially in rural areas and at publically run attractions.

SIGNAGE

⁸ Draft Status Quo, Municipal Airports Project by the School of Development Studies (UKZN) On behalf of DEDT.





A signage plan was formulated and implemented recently; therefore tourism related signage is good in Amajuba. Majority of the accommodation places in Newcastle are on signboards and each of the tourism routes are signposted. Signage still required is as follows:

- Signage from all directions showing 'The Town within a Game Park'
- Signage for service providers in Osizweni and Madadeni
- Signage showing Newcastle along the N3

SUMMARY OF KEY INVESTMENT INFRASTRUCTURE

- Lobby for grants from provincial treasury for upgrade of Newcastle Airport, in conjunction with LED and Newcastle LM.
- Facilitate collaboration between DOT KZN and DOT Free State to fix the R34 via Vrede.
- Introduce transport options, especially between Newcastle and outlying tourism products.
- Investigate the benefits of the train system to tourism.
- Small town rehabilitation of both Utrecht and Dannhauser.
- Invest into Information Communication Technology in rural areas and at public owned tourism attractions
- Improve signage in townships and along main roads (N11 and N3), and stop illegal signage in Newcastle. (Refer SADEC Road Traffic Sign Manual)
- Invest in infrastructure leading to the Drakensberg Foothills/Escarpment and Zaaihoek Dam/to Wakkerstroom in order to open up these key areas for tourism.





INSTITUTIONAL FRAMEWORK

The following section describes the institutional structures necessary for the implementation of the strategy. This section describes the structure as given in the Provincial Tourism Master Plan, the standard structure, the structure that considers Amajuba's unique tourism situation, and the actions needed for this structure to function effectively. A brief discussion of the responsibilities that need to be carried out is also included.

THE KZN TOURISM MASTER PLAN'S MODEL

The following structure is an extract from the Provincial Tourism Master Plan and describes the mandate for tourism institutional structures as well as the options for various public and private sector bodies. The most important message from this model is that one size does not fit all. There are several options for the institutional structure – the one chosen will depend of the unique conditions of the district and LM.

The model describes the following **mandatory** requirements:

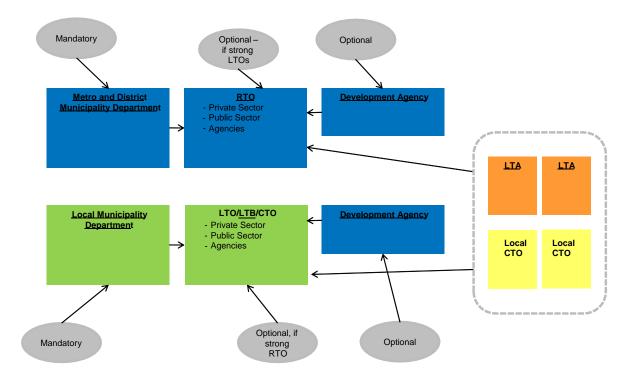
- All municipal (district and local) and metros must have a departmental responsibility for tourism and a resource allocation to tourism.
- All areas of the province should be covered by a Regional or Local Tourism Organization/Bureau/Community Tourism Organisation (RTO or LTO/LTB/CTO)
- Each <u>local</u> municipality can only partner and fund one entity, hence a need for the private sector and communities to come together to partner with the public sector.

The model describes the following **optional** requirements:

- Having a development agency there are several districts where a development agency carries out the tourism development function but this is not suited to all districts.
- It is optional whether a district has both a District Tourism Organisation AND a Local Tourism
 Organisation. If the CTO/LTO is strong, there may be no need for a district organisation and
 vice versa.







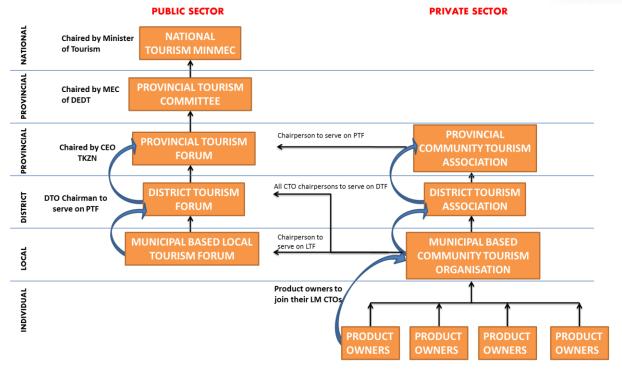
THE STANDARD MODEL

The following diagram describes the standard model for a tourism institutional framework – this includes the maximum number of tourism bodies. In this case there are private sector tourism organisations at each tear of government which are separate from public sector organisations. Each feed into each other, however, creating a structure where bodies are autonomous but have sufficient interlinking to allow for networking and communication. In this model:

- Product owners sit on the CTOs for each local municipality.
- The chair of each CTO sits on the Local Tourism Forum (LM public), the District Tourism Association (private), and the District Tourism Forum (public).
- Only the chairs of the District Forum and the District Tourism Association sit on the provincial tourism bodies.
- In all cases, public bodies are called 'forums' and private sector bodies are called 'organisations' or 'associations'.
- In some cases these private sector organisations or associations can form an agency/nonprofit company (NPC) if necessary.







PROPOSED MODEL FOR AMAJUBA

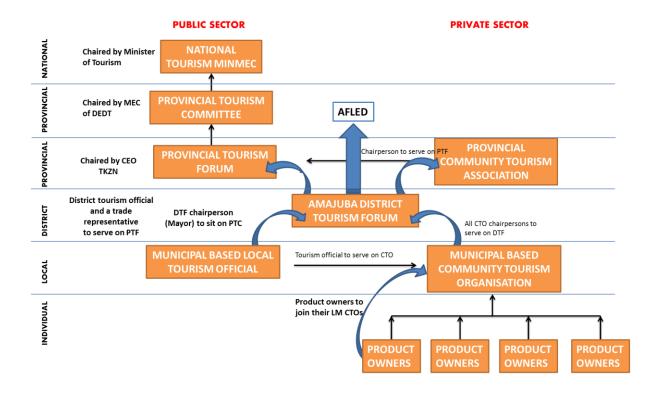
Each municipality is different, however, and the standard model needs to be flexible to meet the unique conditions of each municipality. The following model has been adjusted from the one above to meet the unique condition in Amajuba. Several issues have been taken into account when adjusting this model. Firstly, tourism is not a major economic activity in Amajuba as it is in certain coastal areas and the Drakensberg etc. This negates the need for as many bodies as there are in the model above, particularly at a micro level. Secondly, each local municipality has its own, quite distinct, tourism assets and markets which necessitates co-ordination at local municipality level. Thirdly, there is already a functional District Tourism Forum that incorporates several private sector service providers. This negates the need for a separate private sector District Tourism Association. Fourthly, Amajuba has AFLED (Amajuba Forum for Local Economic Development) which brings together all sectors and strengthens the Tourism Forum. For these reasons, the following model has been suggested. The key differences and factors in this model are as follows:

- There is a CTO (private sector) in each of the local municipalities; but it is not necessary to also have a Local Tourism Forum (public sector) as the strengthened District Tourism Forum carries out this function (as is currently occurring).
- There is a dedicated tourism official in each of the local municipalities who sits on the CTOs. This is vital for the structure at local municipality level to function.
- There is not a separate District Forum and Association but rather just a District Tourism Forum which acts as both (this is the current structure).





- The chair of the ATF (Amajuba Tourism Forum) sits on AFLED as a representative of the tourism sub-committee.
- Private and public sector members from the ATF sit on the provincial bodies.



The following functions/structures need to be introduced to the current institutional system in Amajuba for the above structure to form:

- CTO's need to be formed for each of the three local municipalities (currently Emadlangeni
 has formed unofficially and is in the process of being registered; and Newcastle is in the
 process of gathering members for its CTO).
- Dedicated tourism officials need to be employed at each of the local municipalities as mandated (currently Newcastle is the only LM to have a tourism official).
- Budgets need to be properly allocated to each of the CTOs and the District Tourism Forum.
 More importantly, substantial budgets for tourism need to be given to each of the local municipalities (currently, there is no tourism budget in Emadlangeni and Dannhauser). The district budget should be reviewed.

ROLES AND RESPONSIBILITIES

In order for the proposed tourism model for Amajuba to reach its full potential and function effectively, the following roles and responsibilities need to be understood and support is required to





achieve these responsibilities. Targets will also be placed on these responsibilities as part of the implementation plan.

COMMUNITY TOURISM ORGANISATIONS

The White Paper on the Development and Promotion of Tourism in KwaZulu-Natal clearly spells out the role of the CTO as follows:

- 1. Encourage tourists to visit the destination and experience what it has to offer thus benefiting the community economically,
- 2. Encourage and develop ways in which a community can be more aware of, and skilled in tourism so that members of the community treat tourists correctly,
- 3. Ensure as custodians of local tourism that the right kind of market-driven and sustainable tourism infrastructure is developed and effectively managed in its locality this includes, attractions, accommodation, roads and shops for tourists,
- 4. It is necessary for communities to be organized into Community Tourism Organisations to enable it to provide a coordinated point of dialogue and derive the true benefits of tourism,
- 5. CTO must be representative of all people in the community. It must be autonomous. It must be ensured that the CTO focuses on being truly representative of the communities, and not take on the role of DMO or a "for profit" role. This will distract from its community mandate, and may result in benefiting a few rather than the community at large,
- 6. Be in touch with and have input into local planning, with for example theIDPs, LEDs, and the Provincial Tourism Masterplan,
- 7. Be part of the process when projects are agreed, this includes but not limited to, rejuvenation projects, poverty alleviation projects, and capacity building projects, and
- 8. Champion compliance of BBBEE objectives. In addition to the activities espoused in the White paper, the CTO must also play these critical operational roles:
- 9. Facilitate registration and monitoring all tourism products in the local area
- 10. Develop virtual networks to disseminate information about the local destination and get comments from the local community and the industry at large.
- 11. Play a role of local Publicity Association Entity in marketing, attract events and promote the local destination.
- 12. Create and sustain relationships with other CTOs and reputable tourism organisations, municipalities and provincial governments.

The CTO is made up of private sector product owners only, is autonomous and is representative of the community. The CTO has a responsibility to its members to ensure marketing takes place, communication takes place regularly with the members and the municipality, and that it aids transformation in the tourism sector.

The white paper also spells out the **role of the local municipality** with regard to CTOs. The municipalities should ensure that the CTO:





- Is registered with the department;
- disseminates information to members;
- hosts bi-weekly meetings with the municipality;
- Keeps proper record of finances;
- is fully representative of all tourism stakeholders in the community;
- host Annual General Meetings;
- represents its members in all marketing platforms;
- ensures that viable tourism projects are incorporated into the IDPs and tourism plans;
- and is budgeted for annually.

The role of the local municipality is to ensure that the CTO is compliant with departmental regulations, and is representative. The local municipality should budget for CTOs and include suggested projects in the IDP, tourism strategies and LED documents.

The LM should not dictate terms to the CTO or restrict the autonomy of the CTO.

LOCAL AND DISTRICT MUNICIPALITIES

The following responsibilities are outlined in the KZN Tourism Master Plan:

- Providing a strategic and operational role in maintaining a high quality physical infrastructure;
- Serving as a facilitator to ensure that the needs of the whole destination, including residents, businesses, and the environment, are represented and considered in the management of tourism;
- Providing links and continuity of policy between /across all municipal services, such as
 economic development, planning, land use management, environmental health and roads
 etc;
- Being supportive and playing a facilitative role for partnerships in the sector and therefore driving investment and good performance;
- Co-ordinate marketing, promotion, and information provision for the destination and tourism products therein;
- Integrating tourism into local economic development initiatives.

The major responsibility of local government is **to create an environment wherein private sector can grow the tourism industry** through the provision of infrastructure, co-ordinating between departments and creating partnerships, co-ordinating marketing, and ensuring transformation.





For Amajuba it is important to include the following functions specifically:

- Event co-ordination and financial support
- Research and knowledge management

For these to take place effectively, it might be necessary to employ interns or students to run surveys, collect and collate data, create event calenders etc. The current capacity of the district and local municipal tourism function is insufficient to meet these responsibilities.

• Co-ordination with the Department of Arts and Culture

Amajuba has a wealth of heritage and arts attractions and expertise which mostly fall under the department of arts and culture. It is vital that these are included into the tourism function and budget through proper and consistent co-ordination by tourism and DAC officials.





CONCLUSION OF THE STRATEGY FORMULATION

This strategy is tailored to the specific challenges and opportunities of Amajuba as found in the Situational Analysis and as came out in the tourism workshops. The table below describes the strategies that relate to these challenges and opportunities. This is just a summarized version of a complex set of strengths, weaknesses, opportunities and threats that exist in Amajuba, as well as, the many strategies and projects that relate to these. A full list of strategies and projects can be found in table form in the annexure.

Opportunities and Challenges	Strategies
High volume of business visitors; and a high volume of visitors to events (sporting, cultural and other)	 Market Amajuba's strength: Meetings, Incentives, Conferences and Events Meetings, conferences and events product development
Current level of expertise, infrastructure and natural assets allow for the exploitation of niche markets	 Heritage, avi-tourism and nature based tourism product development Other niche markets and recreational product development.
Tourism information centres in Newcastle and throughout the district are lacking	 Expand and improve tourism information outlets and tools
Roads are currently in a bad state – major construction on N11, R34 in disrepair and D96 not tarred.	 Infrastructure and support services development.
Site maintenance and upgrades are necessary for almost all niche attractions, and nature reserves.	 Heritage, avi-tourism and nature based tourism product development Other niche markets and recreational product development.
Lack of dedicated staff in Dannhauser and Emadlangeni Municipality to manage tourism, lack of CTOs	Improve tourism management through institutional and policy arrangement.
Poor image of Newcastle and lack of knowledge about Dannhauser and Emadlangeni	Branding and route development
Exclusion of new business and SMMEs outside of Newcastle town (due to low demand)	Ensure transformation in the tourism industry





SECTION 5: IMPLEMENTATION PLAN

The implementation plan is the final stage of the Amajuba Tourism Strategy Review for 2012. The implementation plan follows from the situational analysis and the strategy formulation stages and gives a framework within which the projects identified as part of the strategy phase should be implemented. This includes priorities, time frames, project owners, budget and possible funders. It also provides tools for monitoring and evaluating the projects by giving Key Performance Indicators and the amount of time the project should take to be implemented. The sections in this implementation plan are as follows:

- 1) **Implementation Framework** (includes which projects are priority projects and at which stage over the next 5 years they should be implemented)
- 2) **Monitoring and Evaluation Framework** (includes KPIs, project owners and other information about priority projects, also includes general tourism targets based on the National and Provincial tourism targets)
- 3) **Spatial Tourism Development Plan** (provides maps showing the major tourism nodes and corridors, and areas for infrastructure investment)
- 4) **Project Designs** (gives a 1 page write up on 5 priority projects)





IMPLEMENTATION FRAMEWORK

The following implementation framework gives the priority level for each of the projects from high priority (1) to lower priority (3). This priority was decided through a series of workshops, and is based on the following criteria:

- Criterion 1: Economic impact and strategic importance for the tourism sector
- Criterion 2: Skills development and employment creation
- Criterion 3: Industry transformation and SMME development/support
- Criterion 4: Led and potential anchor projects

The priority level gives an indication of how urgent the project is and, therefore, at which stage of the 5 year strategy it should be implemented. The implementation framework also describes what the type of project is. Each of these is equally important, especially in tourism.

- Planning involves the municipality or consultants developing a strategy or plan (the outcome is a document ready for implementation);
- Facilitation involves the municipality co-ordinating something (the outcome is that a task or objective has been achieved); and
- Capital projects are those where there is some sort of infrastructural investment (the outcome is infrastructure development, such as ablutions).

The framework also gives the 'project owner'. This is the municipality who holds the majority of responsibility when it comes to implementing the project. This may be a cluster of municipalities if the project falls over several local municipalities. Most of the projects are the responsibility of Amajuba District, as this is a district strategy, although it is vital that the local municipalities take part in these projects and partner with Amajuba.





STRATEGIC CLUSTER 1: MARKETING – TOURISM GROWTH & DEVELOPMENT (DEMAND)

Strategic Thrust	Project	Type of Project	Project Owner	Priori ty	Year 1	Years 2-4	Year 5
1.1) Market Amajuba's strength: Meetings,	1.1.1) Develop tourism packages and incentives targeted at businesses, schools, sports associations and clubs.	planning	Amajuba	1			
Incentives, Conferences and Events	1.1.2) Produce an information brochure specifically for MICE venues that includes support services such as DJs, speakers, catering, Zulu dancers, security services etc.	planning	Amajuba	2			
	1.1.3) Promote MICE venues and packages in businesses and government in and outside of Amajuba.	facilitate	Amajuba	1			
	1.1.4) Put together an information welcome pack for local businesses to give to visiting businessmen; and promote tourism products at these businesses; hold business networking events.	planning	Amajuba	2			
	1.1.5) Compile a calendar of events and a 'what's on' quarterly brochure.	planning	Amajuba	2			
	1.1.6) Ensure that large events are advertised on all forms of media, reaching surrounding provinces and KZN	facilitate	Amajuba	2			
	1.1.7) Use celebrities from Newcastle as ambassadors.	facilitate	Newcastle	2			
	1.1.8) Ensure that conference centres are registered with SAACI (South African Association for the conference industry) and PCO alliance industry); sponsor conference facilities presence at 'Meetings Africa' and 'Tourism Indaba'.	facilitate	Amajuba	2			
1.2) Expand and improve tourism information outlets and tools	1.2.1) Relocate and refurbish the tourism info centre in Newcastle and Utrecht, with satellite stations at waterside Wimpy and shopping malls.	capital	Amajuba/ Newcastle/ Emadlangeni	1			



Strategic Thrust	Project	Type of Project	Project Owner	Priori ty	Year 1	Years 2-4	Year 5 onwards
Strategie Tillust	Troject	Troject	Owner	Ly .	-	2-4	Onwarus
	1.2.2) Identify and cultivate relationships with up to 10 major advertising						
	outlets that fall across all types of media, throughout KZN and Gauteng.	facilitate	Amajuba	2			
	1.2.3) Contract web designers to design and maintain an Amajuba Experience						
	type website, and similarly to develop and maintain current municipal		Amajuba/ All				
	websites. Launch a social media marketing program.	capital	LMs	1			
	1.2.4) Provide support and encourage private sector and students to build						
	websites in order to increase Amajuba's online presence; support		Amajuba/ All				
	development of the BLNN website.	facilitate	LMS	2			
	1.2.5) Empower and encourage service providers to act as 'information		Amajuba/All				
	centres' in themselves	facilitate	LMs	2			
	1.2.6) Involve businesses and chambers in tourism information collation and	C 1111 .	Amajuba/	_			
	distribution.	facilitate	Newcastle	2			
	1.2.7) Investigate short films, music, arts and travelling theatre as a way to						
	market Amajuba's culture and heritage.	planning	Amajuba	3			
	1.2.8) Link up with surrounding towns in order to develop mutually beneficial						
	marketing strategies e.g Wakkerstroom	facilitate	Amajuba	2			
	1.2.9) Market tourism attractions at stop and gos across Amajuba.	nlanning	Amajuba/ All	2			
	1.2.9) Market tourism attractions at Stop and gos across Amajuba.	planning	LMs	2			
1.3) Branding and route	1.3.1) Create and develop a new, unique brand for Amajuba.	planning	Amajuba	1			
development	1.3.2) Obtain buy in from service providers on each of the current routes, and						
	hand over ownership of these routes. Collaborate with Open Africa in order						
	to revitilise the current 5 routes.	facilitate	Amajuba	2			



		DISTRIBL MON					
Strategic Thrust	Project	Type of Project	Project Owner	Priori ty	Year 1	Years 2-4	Year 5 onwards
	1.3.3) Consider branding of the N11 as an arts and music route, in conjunction with uThukela.	planning	Amajuba/ uThukela	3			
	1.3.4) Update the Amajuba Routes brochure, and include more product information for each route, as well as the Freedom Route	planning	Amajuba	2			
	1.3.5) Identify roles and responsibilities of private sector, public sector, local and district municipalities, and TKZN and determine a process that ensures unified branding and marketing.	facilitate	Amajuba	on- going			
	1.3.6) Implement a 'Being a tourist in your town' campaign - promote weekend activities especially.	planning	Amajuba/ All LMs	2			
	1.3.7) Devise and implement a strategy to turnaround Dannhauser and Newcastle's image as a mining town - using art, culture and music as a base.	planning	Amajuba/ Newcastle/Da nnhauser	2			
	1.3.8) Create awareness of 'The town within a game park' for Utrecht.	planning	Amajuba/ Emadlangeni	2			

STRATEGIC CLUSTER 2: PRODUCT DEVELOPMENT AND PLANNING

Strategic Thrust	Project	Type of Project	Project Owner	Priori ty	Year 1	Years 2-4	Year 5 onwards
2.1) Meetings, conferences and events	2.1.1) Establish team building packages and products in the Drakensberg Foothills and Balele.	planning	Amajuba/ All LMs	3			
product development	2.1.2) Establish a district events calendar procurement/funding strategy in order	planning	Amajuba	1			



		_					
Strategic Thrust	Project	Type of Project	Project Owner	Priori ty	Year 1	Years 2-4	Year 5 onwards
	to manage and co-ordinate events.		.,				
	2.1.3) Introduce a weekly flea-market/food-market event run by community members in Emadlangeni.	facilitate	Emadlangeni	2			
	2.1.4) Start a monthly 'late night shopping experience' every month end at the new mall where shop owners offer promotional deals etc. Incorporate chinese stores and local crafters outdoors.	facilitate	Amajuba/ Newcastle	2			
	2.1.5) Promote wedding venues and packages	planning	Amajuba/ All LMS	2			
	2.1.6) Encourage 'business friendly' accommodation standards, including wifi, workspace etc.	facilitate	Amajuba/Newc astle	2			
	2.1.7) Offer transport by helicopter to businesses.	facilitate	Amajuba/ Newcastle	2			
	2.1.8) Establish a large event hall.	capital	Amajuba	3			
	2.1.9) Co-ordinate, promote and provide adequate infrastructure for regular music and other events at Amsco dam.	capital	Amajuba/ Newcastle	2			
	2.1.10) Support the Department of Arts and Culture in promotion of the Amajuba Rainbow show and Amajuba Community Arts Festival.	planning	Amajuba	2			
	2.1.11) Establish an ecologically friendly conference centre that hosts 'conscious conferences' outside of Newcastle in the scenic areas of the Drakensberg Foothills, Balele, or Chelmsford.	capital	Amajuba	3			
2.2) Heritage, avitourism and nature	2.2.1) Heritage: Identify San rock art in Utrecht and Ncandu and smelting sites, and negotiate protection for the sites before promotion.	facilitate	Amajuba/ All LMs	2			





Strategic Thrust	Project	Type of Project	Project Owner	Priori ty	Year 1	Years 2-4	Year 5 onwards
based tourism product development	2.2.2) Heritage: Transform Majuba Mountain into a 'must see' quality experience (consider feasibility of national war museum on mountain, and yearly major						
	event)	capital	Amajuba	3			
	2.2.3) Heritage: Implement findings of the SiVest 2005 Battlefields infrastructure upgrade plan, including maintenance agreement. Solve access problems surrounding land ownership.	capital	Amajuba/ Newcastle	1			
	2.2.4) Heritage: Open all museums and art galleries on the weekend.	facilitate	Amajuba/Newc astle/Emadlang eni	2			
	2.2.4) Heritage. Open all museums and art galleries on the weekend.	racilitate	em				
	2.2.5) Heritage: Investigate Zulu Heritage products - especially tribal heritage in Dannhauser.	planning	Amajuba/ Dannhauser	3			
	2.2.6) Heritage: Establish a 'Religious Route' (including missions in the area) and include Ghandi related products.	facilitate	Amajuba/ Newcastle	3			
	2.2.7) Heritage: Establish a 'Ghost Route'	facilitate	Amajuba/ Newcastle	3			
	2.1.8) Heritage: Facilitate community driven walking tours in Newcastle and Utrecht that cover all the historical buildings in town.	facilitate	Newcastle/Ema dlangeni	2			
	2.2.9) Avi-Tourism: Identify and install birding infrastructure in 3 or 4 birding hot spots across Amajuba.	capital	Amajuba	2			
	2.2.10) Avi-Tourism: Implement an avi-tourism promotion campaign - across all media with the help of BLSA. Identify and include 'Birder Friendly Establishments' and BLNN routes in this campaign.	facilitate	Amajuba	2			
	and better routes in this campaign.	lacilitate	/ imajuba				





Strategic Thrust	Project	Type of Project	Project Owner	Priori ty	Year 1	Years 2-4	Year 5 onwards
	2.2.11) Avi-Tourism: Establish annual weekend events in Jan/Feb around the Amure Falcon and Barn swallow roosts and Bald Ibises.	facilitate	Amajuba	2			
	2.2.12) Amajuba dams revitalisation project.	capital	Amajuba	1			
	2.2.13) Nature Tourism: Develop Ncandu Forrest into a functioning tourism product and promote.	facilitate	Amajuba/ Dannhauser	3			
	2.2.14) Nature based tourism: Provide exposure and signage to service providers in the drakensberg foothills.	capital	Amajuba/ Newcastle LM	2			
	2.2.15) Nature based tourism: Start a volunteer program centred on conservation in Emadlangeni.	facilitate	Emadlangeni	2			
2.3) Other niche markets and	2.3.1) Arts & Culture: Develop a tourism product surrounding Lucky Dube and his grave site.	planning	Amajuba/Newc astle	2			
recreational product development.	2.3.2) Arts, Culture & Shopping: Collaborate with the Chinese Business Chamber in order to develop and promote tourism products based on the Chinese Culture. Produce a map of Chinese Factory shops.	facilitate	Amajuba/Newc astle	2			
	2.3.3) Arts&Culture: Relocate and expand Carnegie Art Gallery premisis.	capital	Amajuba/Newc astle	1			
	2.3.4) Adventure Tourism: Develop adventure tourism products at Chelmsford, Ncandu and in the Drakensberg foothills and Balele Mountains.	facilitate	Amajuba/All LMs	2			
	2.3.5) Adventure Tourism: Negotiate using one of the mountain passes for a 4by4 trail - it would need to have open access, with permission of the land owner.	facilitate	Amajuba/ All LMs	3			
	2.3.6) Sports Tourism: Investigate the feasibility of introducing game for hunting	facilitate	Amajuba/ All	3			





Strategic Thrust	Project	Type of Project	Project Owner	Priori ty	Year 1	Years 2-4	Year 5 onwards
	in traditional areas with the help of local farmers who already offer hunting.		LMs				
	2.3.7) Sports tourism: Package and promote fishing products across Amajuba, include events.	facilitate	Amajuba/All LMs	2			
	2.3.8) Sports tourism: Attract one (increasing each year) equestrian event to Newcastle. Build a 'bush racing' track, and promote regular events.	capital	Amajuba/ All LMs	2			
	2.3.9) Recreation: Formulate a strategy for the development of recreational activities in Amajuba.	planning	Amajuba	2			
	2.3.10) Recreation: Encourage the development of the Bike Park in Newcastle (Business Plan already in place)	facilitate	Newcastle LM	2			
	2.3.11) Recreation: Investigate the safety requirements of the OSSHACT and the Mines and Works Act in order to develop a theme park in Dannhauser - potentially at the old Durnacol mine site that includes mine tours.	facilitate	Amajuba/ Dannhauser	3			
	2.3.12) Shopping tourism: Attract antique arts and crafts and other small 'home industry' type shops to Utrecht and Dannhauser.	facilitate	Emadlangeni/D annhauser	3			
	2.3.13) Township Tourism: Develop tourism products along the township tourism route, using other successful models as a guide.	planning	Amajuba	3			
	2.3.14) Agri-Tourism: Develop agri-tourism products	planning	Amajuba/ All LMs	3			
2.4) Infrastructure and support services	2.4.1) Ensure that all municipal owned sports infrastructure is properly maintained and up to national standards.	facilitate	Amajuba/ All LMs	On- going			
development.	2.4.2) Lobby for grants from provincial treasury for upgrade of Newcastle Airport, in conjunction with LED and Newcastle LM.	facilitate	Amajuba/Newc astle	1			





		DISTRICT MUNI			1		
Strategic Thrust	Project	Type of Project	Project Owner	Priori ty	Year 1	Years 2-4	Year 5 onwards
	2.4.3) Facilitate collaboration between DOT KZN and DOT Freestate to fix the R34 via Vrede.	facilitate	Amajuba	2			
	2.4.4) Introduce transport options, especially between Newcastle and outlying tourism products.	facilitate	Amajuba/ All LMs	3			
	2.4.5) Investigate the benefits of the train system to tourism.	planning	Amajuba	2			
	2.4.6) Improve police visibility at events and tourists attractions.	facilitate	All LMs	On- going			
	2.4.7) Provide knowledge and incentives to increase accessiblity across all tourism products.	facilitate	Amajuba/ All LMs	2			
	2.4.8) Small town rehabilitation of both Utrecht and Dannhauser.	capital	Emadlangeni/D annhauser	2			
	2.4.9) Facilitate negotiations between stakeholders regarding planned coal mining earmarked for Amajuba (especially Emadlangeni).	facilitate	Amajuba/ Emadlangeni/N ewcastle	On- going			
	2.4.10) Train birding and heritage guides.	facilitate	Amajuba/ All LMs	3			
	2.4.11) Establish budget and backpacker accommodation.	facilitate	Amajuba/ All LMs	3			
	2.4.12) Improve signage in townships and along main roads (N11 and N3), and stop illegal signage in Newcastle. (Refer SADEC Road Traffic Sign Manual)	capital	Amajuba/ All LMs	2			





STRATEGIC CLUSTER 3: PEOPLE IN TOURISM

Strategic Thrust	Project	Type of Project	Project Owner	Priority	Year 1	Years 2-4	Year 5 onwards
3.1) Ensure quality	3.1.1) Improve access to tourism products for accessibility challenged visitors.	facilitate	All LMs	2			
experiences through service excellence.	3.1.2) Identify one national tourism grading standard, conduct grading of all service providers to obtain baseline, provide guidelines, and monitor yearly improvements.	planning	Amajuba	1			
	3.1.3) Sponsor training programmes in service excellence for current employees.	facilitate	Amajuba	2			
	3.1.4) Launch a yearly awards ceremony recognizing excellence in tourism.	facilitate	Amajuba	2			
	3.1.5) Capacity building programmes for Municipalities, CTOs & industry associations	facilitate	Amajuba	2			
	3.1.6) Implement service standards at tourism information centres - with consequences for not meeting standards.	facilitate	Amajuba	2			
	3.1.7) Establish a nuanced & accessible customer feedback system	facilitate	Amajuba/All LMs	2			
	3.1.8) Develop & run regular media projects/campaigns to highlight & profile service excellence	facilitate	Amajuba	2			
3.2) Ensure transformation in the	3.2.1) Conduct a baseline study on the state of tourism transformation in Amajuba.	planning	Amajuba	2			



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Strategic Thrust	Project	Type of Project	Project Owner	Priority	Year 1	Years 2-4	Year 5 onwards
tourism industry.	T TOJECT	Troject	Owner	Thomey	rear 1	2 4	Onwarus
•	3.2.2) Formulate an industry transformation strategy.	planning	Amajuba	2			
			A ! / A				
	3.2.3) Ensure on-going business support for SMMEs	facilitate	Amajuba/All Lms	1			
	5.2.3) Ensure on going business support for Swivies	raciiitate	LIII3				
	3.2.4) Promote compliance with Tourism B-BBEE Sector Code	facilitate	Amajuba	2			
			Amajuba/Ne				
	3.2.5) Continue and expand the tourism ambassadors program.	facilitate	wcastle	2			
	3.2.6) Include under privileged people in the business tourism supply chain		Amajuba/				
	through entertainment, catering and, crafting of corporate gifts.	facilitate	Newcastle	2			
	3.2.7) Establish permanent crafters stalls at tourism nodes/sites and make		Amajuba/ All				
	provision for crafters at events, as well as establishing regular crafting events.	capital	LMs	1			
	3.2.8) Determine marketing strategies and packages that will connect tourists		Amajuba/				
	with the Osizweni Arts Centre.	planning	Newcastle	2			
3.3) Increase tourism	3.3.1) Improve tourism & hospitality career choice perception & career						
awareness.	information for school learners in collaboration with schools, post-grad		Amajuba/All				
	institutions and the tourism information centre.	planning	LMs	2			
	3.3.2) Explaining, lobbying & prioritising the tourism industry with politicians &			on-			
	government officials. Particularly the benefits of sustainability.	facilitate	Amajuba	going			
	3.3.3) Develop programs to improve tourism awareness & understanding amongst		Amajuba/ All				
	learners, students, the media and communities.	planning	LMs	1			





Strategic Thrust	Project	Type of Project	Project Owner	Priority	Year 1	Years 2-4	Year 5
				,			
4.1) Improve tourism management through	4.1.1) Increase local municipality tourism budgets significantly, and review the						
institutional and policy	district tourism budget and lobby for a dedicated tourism official at Dannhauser		Amajuba/ All				
arrangement.	and Utrecht local municipalities.	facilitate	LMs	1			
	4.1.2) Establish CTO's in Dannhauser, Utrecht and Newcastle local		Amajuba/ All				
	municipalities.	facilitate	LMs	1			
	4.1.3) Ensure that rolls are clearly defined between the DMs and LMs and the						
	public and private sectors as per the KZN Tourism Strategy and that all		Amajuba/ All	On-			
	stakeholders are informed, with special attention paid to the autonomy of CTOs	facilitate	LMs	going			
	4.1.4) Ensure the active involvement of all tourism related bodies e.g. EKZNW,			On-			
	Amafa etc. into the Amajuba Tourism Forum.	facilitate	Amajuba	going			
	4.1.5) Identify bureaucratic challenges and obstacles to tourism developments		Amajuba/ All				
	& address these.	facilitate	LMs	2			
			Amajuba/				
	4.1.6) Help desk to handle queries & complaints at tourism information centre.	facilitate	Newcastle	2			
	4.4.71 Decimals and the large state of the large state of the state of		A ! A I				
	4.1.7) Review tourism by-laws at all three local municipalities and form a district framework.	planning	Amajuba/ All LMs	1			
		P - 0					
	4.1.8) Launch a tourism investment promotion strategy.	planning	Amajuba	3			
	4.1.9) Consider starting a quarterly tourism workshop.	facilitate	Amajuba	2			
	4.1.3] Consider starting a quarterly tourism workshop.	racilitate	Amajuba				
	4.1.10) Develop and fast track policies on Municipal Outdoor Advertisement						
	Policies. This will assist with exposure and marketing of local tourism businesses. (Signage)	facilitate	Amajuba/ All LMs	2			





Strategic Thrust	Project	Type of Project	Project Owner	Priority	Year 1	Years 2-4	Year 5 onwards
	4.1.11) Set up a procedure that will guarantee constant communication and coordination between the department of arts and culture (museums and arts attractions) and the tourism function at each tier of local government.	facilitate	Amajuba	On- going			
4.2) Improve tourism management through improved research and knowledge management.	4.2.1) Agree on and implement institutional responsibility & capacity for research & information	facilitate	Amajuba	2			
	4.2.2) Conduct research in order to understand Amajuba's current tourism market segments, and the economic impact of all tourism products, including events.	planning	Amajuba/ All LMs	1			
	4.2.3) Define funds for the research and identification of new tourism products and packages.	facilitate	Amajuba	3			
	4.2.4) Create a dataset outlining tourism services in the District (attraction type i.e. restaurant - seafood, a la carte menu) Number of beds per establishment and total number of beds within each Local Municipal area.	facilitate	Amajuba/ All LMs	2			
4.3) Entrench responsible tourism principles.	4.3.1) Ensure that green principles are incorporated into tourism developments through providing incentives and creating awareness.	planning	Amajuba/ All LMs	1			
	4.3.2) Create visitor awareness of responsible behaviour in communities & the environment	facilitate	Amajuba/ All LMs	2			
	4.3.3) Awareness & capacity-building on responsible tourism for government tourism officials & tourism marketing organizations	facilitate	Amajuba	2			





Strategic Thrust	Project	Type of Project	Project Owner	Priority	Year 1	Years 2-4	Year 5 onwards
	4.3.4) Provide support to tourism businesses & communities to implement responsible tourism	facilitate	Amajuba	2			
	4.3.5) Actively seek out protection for environmentally and historically important sites.	facilitate	Amajuba/ All LMs	2			





MONITORING & EVALUATION FRAMEWORK

The following two sections – 'M&E for priority projects' and 'Overall Sector Targets' - provide tools in order to monitor the implementation and success of priority projects respectively.

M&E FOR PRIORITY PROJECTS

The following table provides information and tools in order to monitor the implementation of the 20 high priority projects taken from the implementation framework table above. Outcomes or key performance indicators are given to indicate the terms by which the implantation of the project can be measured. If these have not been achieved, then project implementation is unsuccessful. The timeframe gives the expected time that these projects should take to be completed. This is an indication only, as unforeseen circumstances can often cause justified delays. The role-players are the affected parties – these should be involved in the implementation process. Budget and funders give an indication of how much a project may cost and who might be interested in funding such a project.

STRATEGIC CLUSTER 1: MARKETING - TOURISM GROWTH & DEVELOPMENT (DEMAND)

STRATEGIC THRUST	PROJECT	OUTCOME / K.P.I	TIMEFRAME	ROLE PLAYERS	BUDGET	POTENTIAL FUNDERS
1.1) Market Amajuba's strength: Meetings, Incentives, Conferences and Events	1.1.1) Develop tourism packages and incentives targeted at businesses, schools, sports associations and clubs.	 Detailed pricing structure including all incentives tourism packages tailored to each market that include niche products such as battlefields tours, township tours and eco-tours buy in from 60%+ product owners increased number of visitors in these categories 	4 months	Amajuba/ Private and public product owners	nil	n/a





STRATEGIC THRUST	PROJECT	OUTCOME / K.P.I	TIMEFRAME	ROLE PLAYERS	BUDGET	POTENTIAL FUNDERS
	1.1.3) Promote MICE venues and packages in businesses and government in and outside of Amajuba.	 Audit of meetings, conference and events venues market tailored promotional material number of local and national businesses with promotion material in their hands number of personal trips and phone calls to businesses by public and private sector number of MCE venues registered with SAACi and PCO number of tradeshows attended increased number of bookings for MCE 	10 months	Amajuba/ Private and public MICE product owners	R 375 000	Amajuba/ CTOs/ Local Municipalities
1.2) Expand and improve tourism information outlets and tools	1.2.1) Relocate and refurbish the tourism info centre in Newcastle and Utrecht, with satellite stations at waterside Wimpy and shopping malls.	 Tourism information centre established in Newcastle and Utrecht in accordance with national VIC strategy satellite stations established high quality staff and experience achieved with m&e system in place 	18 months	Amajuba/ Local Municipalities/ CTOs/ DTF	R5m	DEDT/ Amajuba/ Local Municipalities/ CTO
	1.2.3) Contract web designers to design and maintain an Amajuba Experience type website, and similarly to develop and maintain current municipal websites. Launch a social media marketing program.	 Branding and unified web marketing strategy in place training on managing web and social media conducted Tourism page linking to each of the 4 municipal websites Amajuba experience tourism website Carnegie art gallery website links to battlefields websites twitter and Facebook program with manager in place 	4 months	Amajuba/ Local Municipalities/ CTOs	R 100 000	Amajuba/ Local Municipalities/ CTOs
1.3) Branding and route development	1.3.1) Create and develop a new, unique brand for Amajuba.	 brand in place key products and areas for promotion of Amajuba identified workshops have been held in order to inform service providers new promotional material carries new branding 	4 months	Amajuba/ Local Municipalities/ CTOs/ DTF/ TKZN	R 75 000	In-house





STRATEGIC CLUSTER 2: PRODUCT DEVELOPMENT AND PLANNING

STRATEGIC THRUST	PROJECT	OUTCOME / K.P.I	TIMEFRAME	ROLE PLAYERS	BUDGET	POTENTIAL FUNDERS
2.1) Meetings, conferences and events product development	2.1.2) Establish a district events calendar procurement/funding strategy in order to manage and co-ordinate events.	 minimum of 6 new annual events identified and developed PSC set up per event funding strategy for events in place annual events calendar created quarterly events calendar promoted 	3 months	Amajuba/ Local Municipalities/ CTOs/ DTF/ private and public sector product owners/ sports clubs	R 700 000	DAC/ DEDT/ part sponsorship from businesses, CTOs and role-players
2.2) Heritage, avitourism and nature based tourism product development	2.2.3) Heritage: Implement findings of the SiVest 2005 Battlefields infrastructure upgrade plan, including maintenance agreement. Solve access problems surrounding land ownership.	 Upgrades as stipulated in the SiVest plan have been implemented land ownership issues as identified in the SiVest plan have been resolved and communicated to visitors maintenance is consistent and operational 	1 year (phased)	AMAFA/ Amajuba/ Newcastle LM/ Battlefields route and guides associations/ private land owners	R1.4m (1st phase)/ R1m (2nd phase) -exc roads and maintenance	AMAFA/ DEDT/ Amajuba/ Newcastle LM
	2.2.12) Amajuba dams revitalisation project.	 dam infrastructure upgrade strategy formulated infrastructure upgrades carried out at Balele Game Park, Chelmsford Nature Reserve, Amcor Dam, Trim Park (Newcastle), Tom Worthington Dam (Hattingspruit – Dannhauser) Upgrade of sporting, fishing and birding infrastructure. 	1 year	KZN wildlife/ Amajuba/ All LMs/Msinsi Resorts and Game Reserves	R2m	DEDT/ KZN wildlife/ Msinsi Resorts and Game Reserves (private)





STRATEGIC THRUST	PROJECT	OUTCOME / K.P.I	TIMEFRAME	ROLE PLAYERS	BUDGET	POTENTIAL FUNDERS
2.3) Other niche markets and recreational product development.	2.3.3) Arts&Culture: Relocate and expand Carnegie Art Gallery premises.	 Carnegie Art Gallery has been relocated into a larger venue and is operational the gallery is of a high standard Visitor numbers have doubled 	3 years	Carnegie Art Gallery/ Newcastle LM/ Amajuba	R20m (phased over 3 years)	Department of Arts & Culture/ Newcastle LM/ Amajuba / DEDT/
2.4) Infrastructure and support services development.	2.4.2) Lobby for grants from provincial treasury for upgrade of Newcastle Airport, in conjunction with LED and Newcastle LM.	 Targets and costing for necessary airport upgrades formulated presence of tourism rep at all relevant meetings funding received for upgrades upgrades in progress 	6-18 months	Newcastle LM/Amajuba	nil	nil

STRATEGIC CLUSTER 3: PEOPLE IN TOURISM

STRATEGIC THRUST	PROJECT	OUTCOME / K.P.I	TIMEFRAME	ROLE PLAYERS	BUDGET	POTENTIAL FUNDERS
3.1) Ensure quality experiences through service excellence.	<i>'</i> '	 study of tourism products conducted in order to assess accessibility status quo incentives and minimum requirements formulated accessible infrastructure in place at public attractions monitoring and evaluation procedure operational advertisement of accessible products in action 	1 year (phased)	Amajuba/ All Local Municipalities/ private and public product owners	R 750 000	Amajuba/ Local Municipalities





STRATEGIC THRUST	PROJECT	OUTCOME / K.P.I	TIMEFRAME	ROLE PLAYERS	BUDGET	POTENTIAL FUNDERS		
3.2) Ensure transformation in	3.1.2) Identify one national tourism grading standard, conduct grading of all service providers to obtain baseline, provide guidelines, and monitor yearly improvements. 3.2.3) Establish on-going business support for SMMEs (website	 Unified grading measure identified guidelines distributed to businesses with incentives 70% of businesses have this grading m&e system in place tourism support strategy for SMMEs formulated Number of SMMEs with access to funding, advertising and websites number of training sessions held number of businesses in townships with signage 	6 months	Amajuba/ CTOs/ private and public product owners SMMEs/ Amajuba/ Local	R 250 000	Amajuba/ CTO		
the tourism industry.	development, advertising, training and signage)	 number of black owned SMMEs represented on CTO's and district forums 	6 months	Municipalities/ CTOs	R 500 000	Amajuba/ DEDT		
	3.2.7) Establish permanent crafters stalls at tourism nodes/sites and make provision for crafters at events, as well as establishing regular crafting events/ exploit Osizweni centre	 number of permanent stalls at tourism nodes number of events hosting temp craft stalls number of visitors to Osizweni arts and crafts centre 	6months	crafters/ event's organisers/ CTOs/ Amajuba/ Local municipalities	R1m	DAC/ DTI/ DEDT/ Amajuba/ Local Municipalities		
3.3) Increase tourism awareness.	3.3.3) Develop programs to improve tourism awareness & understanding amongst learners, students, the media and communities.	 Number of programmes to increase tourism awareness number of schools visited number of media campaigns number of community workshops and road shows 	6 months	Amajuba/ local Municipalities	R 500 000	DEDT/ Amajuba/ LMs		





STRATEGIC CLUSTER 4: POLICY, STRATEGY, GOVERNANCE, RESEARCH & KNOWLEDGE MANAGEMENT MONITORING & EVALUATION

STRATEGIC THRUST	PROJECT	OUTCOME / K.P.I	TIMEFRAME	ROLE PLAYERS	BUDGET	POTENTIAL FUNDERS
4.1) Improve tourism management through institutional and policy arrangement.	4.1.1) Increase local municipality tourism budgets significantly, and review the district tourism budget and lobby for a dedicated tourism official at Dannhauser and Utrecht local municipalities.	 Emadlangeni and Dannhauser have a budget allocated to tourism Emadlangeni and Dannhauser have a tourism official employed review of Amajuba and Newcastle's tourism budget has been conducted 	6 months	Amajuba/ Local municipalities/ DEDT	staff (R170 000)/ budget allocation (1m)	DEDT/ Amajuba/ Local Municipalities
	4.1.2) Establish CTO's in Dannhauser, Utrecht and Newcastle local municipalities.	 CTOs have been established and registered in all three LMs all service providers are registered with the relevant CTO meetings are held regularly information is being passed onto members CTO chair is attending the ATF 	6 months	Amajuba/ Local municipalities/ DTF and CTOs	TBD	in-house
	4.1.7) Review tourism by-laws at all three local municipalities and form a district framework.	 A review of by-laws at each local municipality has been conducted district framework for tourism by-laws is in place CTOs are informed 	3 months	Amajuba/ Local municipalities/ DTF and CTOs	n/a	n/a
4.2) Improve tourism management through improved research and knowledge management.	4.2.2) Conduct research in order to understand Amajuba's current tourism market segments, and the economic impact of all tourism products, including events.	 60% of all tourism product owners are providing monthly visitor stats to their CTO a methodology has been established in order to carry out event impact assessments and all annual events are being assessed surveys are being conducted at the stop and gos surveys of local businesses have been completed statistics have been compiled into trends and targets have been set 	1 year	Amajuba/ Local municipalities/ DTF and CTOs	R 375 000	DEDT/ TKZN





STRATEGIC THRUST	PROJECT	OUTCOME / K.P.I	TIMEFRAME	ROLE PLAYERS	BUDGET	POTENTIAL FUNDERS
4.3) Entrench responsible tourism principles.	'	number of workshops held, number of newsletters sent out through CTOs	6 months	Amajuba/ Local municipalities/ DTF and CTOs	R 500 000	in-house





TARGETS

The following table provides baseline values and targets for key tourism indicators in Amajuba. These indicators have been taken from the NTSS and KZN Master Plan. Where values were given for South Africa and KZN, they have been included. Figures for Amajuba have been derived from various sources which are described in the table, however, in many cases values could not be derived due to lack of information. An important function of the tourism division of Amajuba going forward, will be to gather the necessary information in order to form accurate indicators and targets. Suggested means of gathering this data have been suggested in the table.

Table 12 Baseline Indicators based on NTSS and KZN Master Plan indicators

Focus	Measure	National & Provincial baseline values (2009/10)	2015 Target	2020 Target	Amajuba baseline values (2010)	2015 Target	2020 Target	Source of indicator value
GDP	Direct GDP impact	National: R71,4 bn (3% of GDP)	R118,4 bn	R188 bn (2,9% of GDP) R65,2bn (R40,4bn 2009 Rands)	R53,3 mn (0.6% of district total GDP)	106.6m (1.2% of GDP)	R133.2m (1.5% of GDP)	Based on values for catering & accommodation sector only (Quantec Regional Data, 2010)
	Direct & Indirect GDP impact	National: R189,4 bn (7,9% of GDP) Provincial: R33bn	R318,16 bn	R499 bn R98,4bn	100,6 mn	R194m	R242m	National Input-Output table (Urban-Econ, 2010)
	ППрасс	Provincial: R33bn		R98,4bn (R60,66bn				2010)





Focus	Measure	National & Provincial baseline values (2009/10)	2015 Target	2020 Target	Amajuba baseline values (2010)	2015 Target	2020 Target	Source of indicator value
				2009 Rands)				
Visitor Numbers	Foreign	National total: 9 933 966	12 068 030	15 000 000	2009 visitors (holiday)	4000 visitors	8 000 visitors	
		Provincial total: 1 213 001		2 095 410	1339 visitors (business)	3000 visitors	6000 visitors	Urban-Econ estimates based on TKZN number
	Domestic	National Total: 14 600 000	16 000 000	18 000 000	7900 visitors (holiday)	12 000	20 000	of visitors to the Battlefields
		Provincial Total: 8 800 000		16 301 935	31 600 visitors (business)	43 500	48 000	
Employment	Direct	National: 389 100	403 900	461 700		oyed 1400 employed	1500 employed	Employment in the
		Provincial: 100 000		183 820	1292 employed			catering & accommodation sector (Quantec regional data, 2010)
	Direct and Indirect	National: 919 800	968 300	1 097 000				National Input-Output
		Provincial: 133		244 480	1977 2143	2143	2296	table (Urban-Econ, 2010)
Investment	Public	National: R82,4 bn	R100 bn	R118 bn	no baseline data available			Investment data can be gathered from building
	Private	no baseline data			no baseline data available			plans approved and amount spent on new
	Foreign Direct	National: R3 bn	R3.8 bn	R4 bn	no baseline data available			tourism projects in Amajuba
Transformation	No of companies with a BEE scorecard	no baseline data available			no baseline data available			It is recommended that this information is





Focus	Measure	National & Provincial baseline values (2009/10)	2015 Target	2020 Target	Amajuba baseline values (2010)	2015 Target	2020 Target	Source of indicator value
	No of companies with high level accreditation	no baseline data available			no baseline data available			gathered through the CTO or that a survey is conducted annually
	Number of companies reaching tourism charter targets	no baseline data available		70% of charter compliance	no baseline data available			
	Number of black majority owned companies	no baseline data available			no baseline data available			
Rural Tourism	Number of visitors to rural businesses:	no baseline data available			no baseline data available			Information should be gathered at each rural attraction and accommodation place
	Number of attractions in rural areas:	no baseline data available			no baseline data available			Information to be gathered through CTO
Number of bed	Foreign	National: 15.80%	21.10%	25%	no baseline data available			Occupancy information needs to start to be
nights in low season months	Domestic	National: 5.30%	7.10%	10%	no baseline data available			gathered from every accommodation place in Amajuba
Visitor Experience	Number of visitors whose experience meets or exceeds their expectations	no baseline data available			no baseline data available			Service excellence survey, or customer satisfaction cards is necessary to gather this info.
Awareness	increased levels of	no baseline data			no baseline data			This can be assessed in



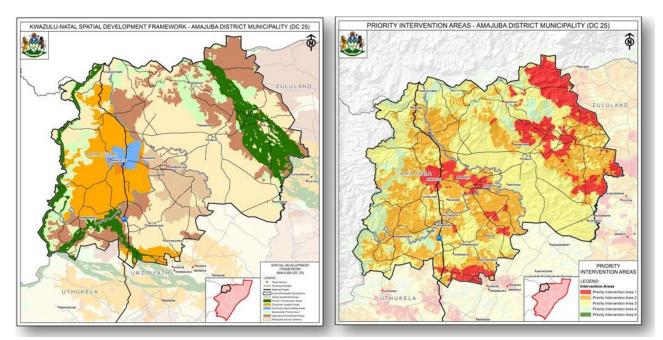


	DISTRICT MUNICIPALITY							
		National &	2015	2020 Target		2015	2020 Target	
		Provincial	Target		Amajuba	Target		6
Focus	Measure	baseline			baseline			Source of indicator
		values			values (2010)			value
		(2009/10)						
	awareness of tourism	available			available			future through surveys
	and its value							and also investment.
	Increase in levels of	no baseline data			no baseline data			
	community	available			available			
	participation	avanable			avanable			
Meetings,								
conferences	Number of events >	no baseline data			no baseline data			Requires district level
and events	1000 people	available			available			co-ordination of events
market growth								
	Economic Impact of	no baseline data			no baseline data			Requires economic
	Events	available			available			impact surveys
	Number of meetings	no baseline data			no baseline data			Each conference venue
	and conferences	available			available			to provide data
Niche Market	Number of visitors per	no baseline data			no baseline data			
Growth	niche market	available			available			

SPATIAL TOURISM DEVELOPMENT PLAN

PROVINCIAL SPATIAL DEVELOPMENT FRAMEWORK

The two maps below illustrate the Provincial Spatial Development Framework elements as well as the key intervention areas as they relate to the Amajuba District Municipality specifically. It is relevant to tourism that Amajuba is bordered on the east and west by priority conservation areas and biodiversity priority 1 areas (in dark green and light green respectively). Combined, these represent 'conservation corridors' on which tourism development is the most viable.



In supporting growth and development within the Amajuba District as well as supporting the proposed spatial structure and areas in need of intervention, the following provincial catalytic tourism projects are envisaged within the district:

- Rapid Transit Rail (Speed Rail)
- Nature Based Tourism
- Eco, Battlefields & Cultural Heritage Tourism Routes
- Small Town Regeneration
- Regional Airports
- Innovation Hub
- New Tertiary Institution
- Rural Service Centers

AMAJUBA TOURISM SPATIAL DEVELOPMENT FRAMEWORK

The following map indicates the linkages to towns and districts that surround Amajuba. The N11 provides a link to JHB in the north and to Ladysmith and Durban in the south making it the most important road in Amajuba, carrying the majority of people through Amajuba. On the border of



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Amajuba and on the N11 lies Volksrust which is an important tourism node. The N11 is the main access road to Amajuba, but it is currently under construction causing up to 1 hour delays. This construction is set to continue for the next 5 years. Newcastle, the primary node, falls on the N11. Newcastle is also considered to be one of 4 secondary nodes in KZN.

The second most important road is the R34 which travels from east (Memel, Vrede, N3) to west (Utrecht, Vryheid, Zululand). Because it links up with the N3, this is often the chosen route from JHB. Memel and Vrede are also considered to be tourism nodes, with birding and fishing being the primary activities. This road is also in a bad condition with several people refusing to travel it due to pot holes. Another important avi-tourism linkage is along the road to Wakkerstroom which is considered to be a birding 'mecca'. This area has been registered as an 'important birding area' and could form part of a link from Dundee birding sights and Memel birding sites. There is also substantial movement along the R33 from Vryheid to Dundee and R621 from the N11 to Dundee. Dundee is an important area for tourism due to its heritage sites.

Most of these roads are the roads along which passenger movement is the highest and the department of transport has correctly identified them for upgrades. The following upgrades are in progress:

- 13. N11 Newcastle to Volksrust roadworks proposed completion May 2012.
- 14. N11 Newcastle to Ladysmith roadworks phased completion 2014.
- 15. R34 P211, P37, P41 Memel Utrecht- Vryhied Phased roadworks anticipated completion 2014.
- 16. R621 P39, P209, P210, P35/2 Phased roadworks anticipated completion 2013
- 17. R33 P34/2 Phased roadworks anticipated completion 2013
- 18. D 96 PPP Dunblane development anticipated completion date 2013

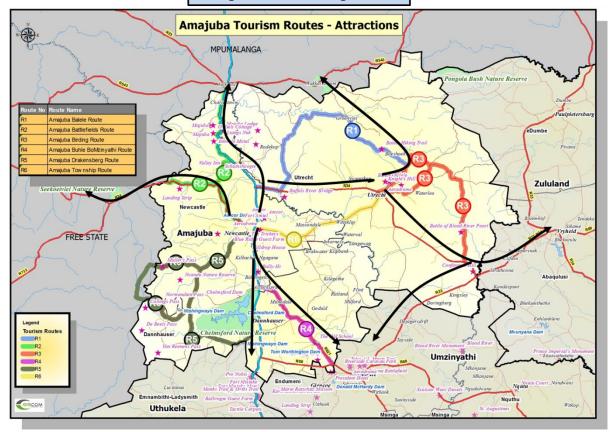
The important linkages can be summarised as follows:

Road	Link	Amajuba Tourism Route			
N11	Volksrust and JHB in the north	R2 – Amajuba Battlefields Route			
	Ladysmith and Durban in the south	no			
R34	Memel, Vrede and the N3 in the west	R2 – Amajuba Battlefields Route			
	Vryheid and into Zululand in the east	no			
R621 and R33	Dundee	R4 – Buhle-Bomzinyathi Route			
R543	Wakkerstroom	R1-Amajuba Balele Route			

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Linkages to surrounding districts



The following map shows the tourism nodes identified in the Amajuba SDF and IDP. These nodes are positioned along the Drakensberg Escarpment. It should be noted that these are not currently functioning as tourism nodes but are rather identified as areas of tourism potential. Utrecht is also identified as a tourism node. Infrastructure investment is required in both of these areas.

Suggested tourism nodes include Newcastle (currently functioning as the primary tourism node – with by far the majority of tourism products in Amajuba), and a suggested heritage tourism node on the N11 around Majuba Mountain. This heritage node is in need of infrastructure development and forms an important bridge into the Volksrust area.

- Primary tourism node: Newcastle
- Secondary Nodes: Utrecht, Heritage Node
- Tertiary (Development) Nodes: Drakensberg Escarpment/ Foothills

Areas of strategic importance for tourism information distribution are also market on the map. The most important information centre should be in Newcastle at the intersection of the main roads (N11 and R34). Satelite information offices in the Mall and waterside Wimpy are also necessary in Wimpy. Tourism information centres are also necessary at Utrecht and Chelmsford Dam.

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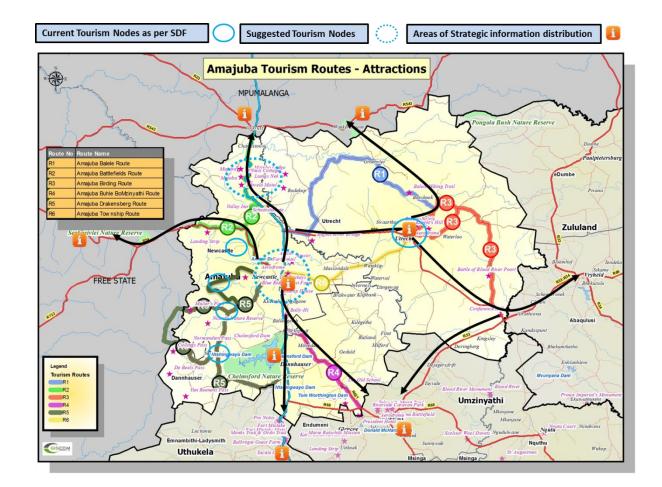
AMAJUBA DISTRICT MUNICIPALITY

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Linkages should be made with information centres surrounding Amajuba in order to have tourism information about Amajuba promoted in these centres which are along key tourism corridors and are tourism nodes in themselves. These include: Ladysmith, Dundee, Memel and Vrede, Volksrust, and Wakkerstroom.

In this way, tourists will have access to information along all of the main tourist routes:

Road	Link	Information Distribution Points		
N11	Volksrust and JHB in the north	Volksrust; Newcastle (N11, Mall, Waterside Wimpy)		
	Ladysmith and Durban in the south	Chelmsford Nature Reserve, Ladysmith		
R34 Memel, Vrede and the N3 in th		Memel and Vrede		
Vryheid and into Zululand in the east Utrecht		Utrecht		
R621 and R33	Dundee	Dundee		
R543	Wakkerstroom	Wakkerstroom		



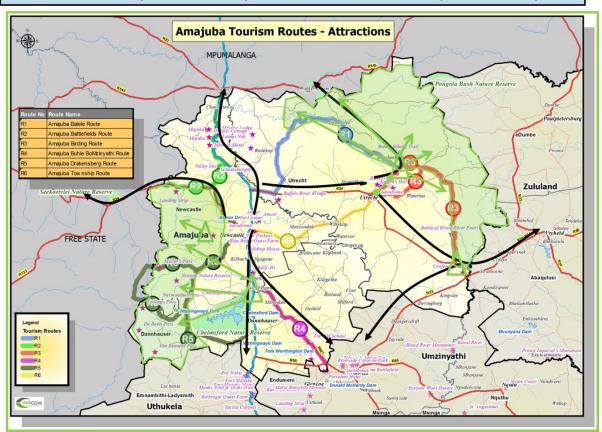
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As mentioned in the Provincial Framework, Amajuba contains two conservation corridors, which can be used to create tourism demand. The following map depicts these corridors in green. To the east lies the Balele Mountains, wetlands and Zaaihoek Dam, as well as the link to Wakkerstroom. To the west lies the Drakensberg escarpment with links into Ladysmith, Drakensberg mountains, Memel and Johannesburg. These areas fall over three of the Amajuba Routes (Balele, Bivane and Drakensberg routes) and require tourism investment phased over the next 5-7 years. Vulintaba resort in the Drakensberg Escarpement will lead to huge improvements in infrastructure and demand once it is completed and operational in the next 3 years. The areas do not include current developed product such as the Chelmsford nature reserve which will form a vital bridge for development into these new areas.

The green triangles on the map below depict future tourism nodes which will service these scenic areas.

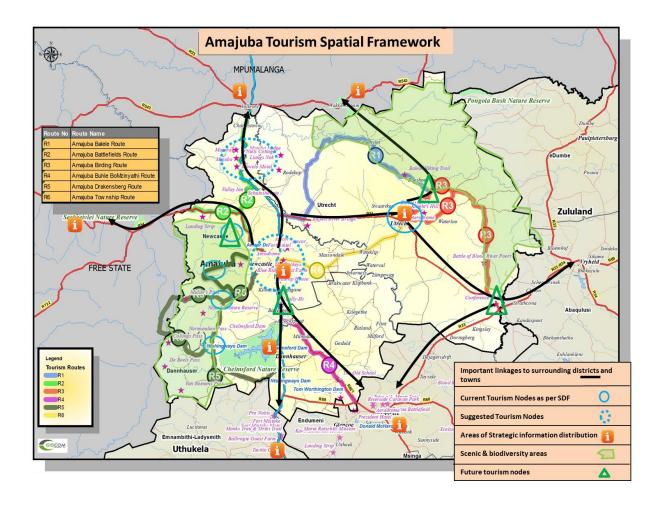
Areas of scenic beauty and biodiversity earmarked for future tourism product development



The following map is a composite map depicting all nodes, linkages, information distribution points and conservation corridors (areas for future product development).



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Conclusions of the spatial development plan:

- Concentrate tourism development on primary and secondary tourism nodes in the short term;
- Use important linkages (roads and nodes) to determine the spatial spread of the distribution of information and development of products in order to boost demand;
- Concentrate the planning of long term tourism infrastructure investment along conservation corridors.



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PROJECT DESIGNS

The following 6 projects are selected from the 20 priority projects above and represent the actions of highest priority. For these projects, more detail on the implementation process is given.

Name:		Relocate and refurbish the tourism info centre in Newcastle and Utrecht, with attellite stations at waterside Wimpy and shopping malls.					
Project N	lo	1.2.1	Type:	Capital			
Objective: Improved tourism information distribution and awareness in order to incredefine demand for tourism products.				to increase			
Description:							

Build a tourism information centre in Newcastle on the N11. The information centre should cater for business tourist information, provide access to the internet, and be interactive. The CTO should be heavily involved in the management. Build a tourism information centre in Utrecht at the gates to the town within a game park. This can be smaller, and cater towards holiday tourists mainly. Important internet and booking function. Important to have links with other information centres outside of Amajuba. Satellite info centres should be placed at Chelmsford Nature Reserve; Waterside Wimpy and the new Amajuba Mall. These do not necessarily have to be staffed.

Justification:

Currently, the tourism information centre in Newcastle is situated in the town hall and does not provide an adequate tourism function. The centre needs to visible and lie on the main tourist corridor. Currently the centre holds brochures only. The new centre needs to be of a high quality if an excellence in tourism is to be achieved. Utrecht is an unknown tourism gem, the information centre is necessary to create awareness of all the tourism products on offer. Especially since those service providers in the mountains are not very accessible. It is vital that priority is given to information distribution in order for the current low demand for tourism products in Amajuba to be increased. Information can first be targeted at business men and locals as awareness can grow off the current base.

Benefit for SMMEs:	Anticipated Resul	ts:		
At the primary VICs – Newcastle and Utrecht – crafters can be included. Space for making and selling crafts should be included in the VIC design. VICs should market SMMEs vigorously. Curios can be supplied.	Awareness about tourism products is increased substantially. Information catered towards business tourism and events leads to increased attendance at events and demand for meeting and conferences. Overall demand for tourist products increases.			
Activities to be Undertaken:	KPIs:			
 Identify sites for all offices including satellite offices and resolve land ownership and zoning issues Produce a business plan and secure funding Commence building on both sites, include an office or meeting space for CTO Include adequate ICT infrastructure 	Newcastle VIC strateg Satellite st High qual standard o m&e syste Role Players:	Newcastle and Utrecht in accordance with national VIC strategy Satellite stations established High quality staff employed providing a high standard of service m&e system in place		
Write up a contract for management structure that includes the CTO	Budget:	R5m		
Ensure staff training in service	Sources of Funding:	DEDT/Amajuba/ Local Municipalities/ CTO		
excellenceDevelop a monitoring and evaluation system	Timeframe:	18 months		

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Name:		ablish a district events cale nage and co-ordinate events	-	rement/funding strategy in order to	
Project No		2.1.2	Type:	Planning	
Objective:		Improved co-ordination of events leads to more large events being held more often with better advertising which in turn leads to increased visitor numbers and tourism awareness.			

Description:

While the majority of events will be managed by separate clubs, departments etc. They should be coordinated through a central place (Amajuba Forum, CTO, VIC). This is especially true of annual events. An events calendar should be produced so that advertising can be co-ordinated and a brochure can be distributed with upcoming events. A platform and procedure should be in place where people can apply for funding for a new event upon submission of a basic feasibility study. Several new large, annual events should be targeted in the arts, music, sports and business arena. PSCs should be created for events with a large amount of money attached to them. All events should aim to be self-sustaining with the municipality providing a support service re services.

Justification:

Currently, events attract the second largest amount of people to Amajuba. New events and support for current events should therefore be encouraged as a high priority. Several clubs and individuals consulted are enthusiastic to hold events but require the startup capital (often this is only a few thousand rand) and require support from the local municipality. These events should be cultivated. Events in areas like Dannhauser and Emadlangeni which are currently largely unknown will be vital in creating awareness. Niche markets such as avi-tourism, heritage tourism and the arts also require signature events in order to create awareness of the unique assets within Amajuba.

Benefit for SMMEs:	Anticipated Resul	ts:
At each event SMMEs can be encouraged to supply catering, and entertainment. Arts and Culture practitioners can set up crafts stalls. A space with temporary structures should be guaranteed at each event.	events have acce municipality. A co the CTOs and D	ge annual events, and several smaller ss to funding and support from the o-ordinating function is being lead by istrict Forum leading to increased therefore increased number of
Activities to be Undertaken:	KPIs:	
 Identify responsible forum for events co-ordination and key staff member (ATF and 1 staff member) Determine events budget and procedure for application for funding. Promote this procedure. Identify 6 new annual events and assign each event to a PSC Gather information on all events and formulate a yearly events 	and devel PSC set up Funding st Annual ev	m of 6 new annual events identified oped oper event trategy for all events in place ents calendar created events calendar promoted Amajuba/ Local Municipalities/ CTOs/ DTF/ private and public sector product owners/ sports clubs
calendar.	Budget:	R700 000
 Start producing a quarterly events calendar for advertising purposes. Ensure spatial and sector spread of 	Sources of Funding: Timeframe:	DAC/ DEDT/ part sponsorship from businesses, CTOs and role-players
events, and promote events venues.	Timetrame:	3 months





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	Name:	Am	ajuba dams revitalisation projec	t.	
Project No 2.2.12 Type: Capital		Capital			
Objective: Improve infrastructure at dams across Amajuba in order to attract more visitors a			ajuba in order to attract more visitors and		
			events.		

Description:

Introduce camp-sites and security at Zaaihoek Dam. Increase accommodation capacity at Chelmsford Nature Reserve and consider involving Msinsi Resorts and Game Reserves in its management. Increase accommodation capacity at Balele Game Park and provide support for its impending change in management and upgrade. Introduce and upgrade of info lapha boards, ablutions and picnic sites and other infrastructure at Balele Game Park, Chelmsford Nature Reserve, Amcor Dam, Trim Park (Newcastle), Tom Worthington Dam (Hattingspruit – Dannhauser). It is vital that this infrastructure upgrade includes sporting, fishing and birding infrastructure in collaboration with the appropriate clubs.

Justification:

Currently, Chelmsford Nature Reserve and Balele Game Park attract the highest amount of leisure visitors out of all tourism products in Amajuba. The majority of these visitors are local but there are visitors from outside Amajuba especially over the holidays and during events. Both reserves, however, are in need of upgrades and especially an increase in accommodation as they have to turn people away over the summer months. Furthermore, Zaaihoek dam is beautiful but is not developed. Tom Worthington dam has a few service providers but is lacking in infrastructure. Amcor and Trim Park could also be revamped to better host events. These dams are a tourism asset and unlock events, adventure and sports tourism opportunities.

Benefit for SMMEs and Employment:	Anticipated Resul	ts:	
Employment opportunities will be created at each of the sites in order to maintain public infrastructure and as security. The number of events will increase and therefore the opportunity for entertainers, caterers and crafters will be increased.	All 5 identified dams have ablutions, accommodation, picnic sites, info boards, sports and birding infrastructure. These are en route to the dams as well as at the dams. This leads to more holiday visitors, especially over the summer months, and an increased number of events.		
Activities to be Undertaken:	KPIs:		
 Formulate a Dam Revitalisation strategy that identifies which infrastructure is necessary in which locations and identifies possible private development partners. Set up PSC that includes relevant bodies such as KZN wildlife and BLNN 	 Infrastruct Park, Chelr Trim Park ((Hattingsp 	tructure upgrade strategy formulated ure upgrades carried out at Balele Game msford Nature Reserve, Amcor Dam, (Newcastle), Tom Worthington Dam ruit – Dannhauser) f sporting, fishing and birding ure.	
 Liaise with private sector bodies (such as Msinsi Resorts and Game Reserves) 	Role Players:	KZN wildlife/ Amajuba/ All LMs/Msinsi Resorts and Game Reserves	
to determine budget requirements.	Budget:	R2m	
 Develop a business plan and apply for funding. Commence with the strategy. 	Sources of Funding:	DEDT/ KZN wildlife/ Msinsi Resorts and Game Reserves (private)/ COGTA	
 Promote these assets to event's organisers in order to assure awareness is created. 	Timeframe:	1 year	



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Name:	Identify or	ie na	ational t	ourism gra	ding stan	dard, conduc	t grad	ling of all	service
	providers	to	obtain	baseline,	provide	guidelines,	and	monitor	yearly
	improvem	ents							

Project No	3.1.2	Type:	Planning	
Objective: To achieve service excellence in Amajuba.				

Description:

Identify one national tourism grading standard in line with the chosen provincial grading standard. Possibility to include a grading for accessibility, green procedures and responsible tourism practices. Conduct grading of all service providers to obtain baseline, provide guidelines on how to progress in grading, and monitor yearly improvements. Ensure that visitors have access to this information and possibly include this in yearly awards for tourism excellence. This should include attractions — not only accommodation and should include public sector attractions.

Justification:

There are several tourism gradings offered on national and provincial level, private and public. It is recommended that one is chosen and standardised amongst all tourism service providers in order to monitor the excellence and quality of these institutions as well as provide useful indicators of standard to visitors. Having a measure of service provides valuable information on the progress of tourism in Amajuba and help understand the assets in Amajuba.

todisin in Amajaba and neip anderstand the t	assets in 7 inajaba.		
Benefit for SMMEs and Employment:	Anticipated Resul	ts:	
SMMEs have a guideline based on provincial standards on how to run an excellent business. This sort of information is vital for new institutions.	Service excellence becomes enrooted in tourism practice in Amajuba. Amajuba becomes knows for the quality services provided and its above average accessibility. Tourists find their stay easy and enjoyable and demand increases.		
Activities to be Undertaken:	KPIs:		
 Liaise with DEDT to get an understanding of the provincial grading standard that will be used and the guidelines attached to it. Run workshops and send out information through CTOs on this grading and how it is to be achieved. After 3 months, grade all tourism products, again providing guidelines on how to improve service. 	IncorporaGuideline70% of buM&E syste	ading measure identified te green and BBBEEE principles s distributed to businesses sinesses have this grading em in place or service excellence Amajuba/ CTOs/ private and public product owners R250 000	
Become actively involved in improving accessibility at all public	Funding: Timeframe:	Amajuba/ CTO/ DEDT/ TKZN 3 months	
 attractions. After 8 months send out a reminder and after one year grade the service providers again. Issue awards 	imename.	3 monus	





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Name: Est	ablish CTO's in Dannhauser,	. Utrecht and	l New	vcastle local municipalities.
Project No	4.1.2	Туре:	Facil	litation
Objective:	Establish representative CTO Amajuba.	s to aid in t	he re	egulation and growth of tourism in
Description:				
Establish CTO's	s in Dannhauser, Utrecht and No	ewcastle loca	muni	icipalities.
Justification:				
Emadlangeni h does not have point of comm	nas formed a CTO unofficially a a CTO. It is vital that these or	and is in the ganisations a	proce re esta	s in the process of establishing one. ess of being registered. Dannhauser ablished as they provide an essential roviders. They also form the bridge
Benefit for SN	IMEs and Employment:	Anticipated	Resul	lts:
smmEs will be therefore has structure of the to informatio complaint me mentored by I the opportunit	local tourisr communica providers fo CTO chairm are started	n offiction in r the l an sits and dr	in all three local municipalities. The cial sits on the CTOs and acreases between the LM and service benefit of tourism in Amajuba. Each son the ATF. More tourism projects riven more effectively. Everyone uniform vision.	
Activities to be	e Undertaken:	KPIs:		
 Consult with private sector service providers Facilitate process of forming a CTO Identify suitable office and budget Sit on CTO meetings Ensure chairperson sits on the ATF Ensure that the CTO is representative and carries out all 		all t	hree L ervice vant C etings rmatic	e providers are registered with the
		Role Players	5:	Amajuba/ Local municipalities/ DTF and CTOs
respor	responsibilities.			Budget for CTOs TBD
		Budget: Sources Funding:	of	in-house

Timeframe:

6 months



AMAJUBA BISTRIET MILINGIPAL PV

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	Name:	Cor	nduct research in order to understand Amajuba's current tourism market				
		seg	egments, and the economic impact of all tourism products, including events.				
	Project No		4.2.2	Type:	Planning/Research		
Objective: To have sufficient knowledge of the tourism market to implement appropri			urism market to implement appropriate				
			projects and assess the success of these projects.				

Description:

There are three methods of tourism research that are vital in Amajuba. The first is conducting research into the number and characteristics of visitors as collected from tourism products directly in Amajuba. The second is to conduct research into the characteristics of visitors through surveying businesses and vehicles at the stop and gos. Both of these help to understand the market segments in Amajuba and the number of people that fall into each market segment. These also help to determine trends in visitor numbers over time. The third type of research is economic impact assessment. This determines which products make more of an economic impact or cause visitors to spend the most money. This is particularly important for events.

Justification:

It is almost impossible to know which market segments to target with marketing and new projects when there is inadequate information. It is also impossible to know which products are attracting visitors and which aren't without research. Most importantly, it is impossible to determine the success of any projects if research is not done to determine whether visitor numbers are increasing or decreasing. Research is thus required to guide marketing and projects, as well as monitor and evaluate them.

evaluate them.				
Benefit for SMMEs and Employment:	Anticipated Results:			
A wide variety of temporary staff will need to be employed to carry out surveys and staff will be needed to collate data. Activities to be Undertaken: Write a business plan and motivate for funding.	A wealth of data exists that allows for precise and informed decisions and strategies to be formed. Targets can be realistically stated. KPIs: 60% of all tourism product owners are providing monthly visitor stats to their CTOs			
 Consult thoroughly with CTOs and TKZN research department to develop research methodology (option to use consultant) Formulate surveys where needed and hire survey staff temporarily (stipulate a start and end date) Begin event impact assessments. Gather all data and analyse it in a detailed report. 	 A methodology has been established in order to carry out event impact assessments and all annual events are being assessed Surveys are being conducted at the stop and gos Surveys of local businesses have been completed Statistics have been compiled into trends and targets have been set for a monitoring and evaluation program 			
 Conduct research consistently and formulate monthly trend reports. 	Role Players:	Amajuba/ Local municipalities/ DTF and CTOs		
Determine realistic targets for the	Budget:	R375 000		
public sector.	Sources of Funding:	DEDT/ TKZN		
	Timeframe:	1 year		



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ANNEXURE

1) SUGGESTED PRIORITY PROJECTS FROM THE BATTLEFIELDS PLAN BY SIVEST (2005)

11.1.1 First Phase Development Sites

PRIORITY	SITE NAME	PHASING OF UPGRADES	REASON FOR PRIORISATION
1	Schuinshoogte	Interpretation boards Fencing "in" the sites from the surrounding farms	Easily accessible, sense of place, historical importance, low upgrade cost, readiness for tourism
2	Amajuba Hill	Pathway Museum Upgrades, ablutions and refreshment outlet Interpretation boards Aesthetic upgrades (for landowners account)	Refreshment and ablution "node" on battlefields route, easily accessible, sense of place, historical importance, moderate upgrade cost, readiness for tourism
3	Fort Amiel and Cemetery	Pathway Parking area Interpretation boards Ablutions and refreshment outlet	Refreshment and ablution "node" on battlefields route easily accessible, sense of place, historical importance, low upgrade cost, readiness for tourism
4	O'Niels Cottage	Cottage Upgrading Access road Potential secondary activities as proposed by land owner (ablutions and refreshment outlet)	Refreshment and ablution "node" on battlefields route moderately accessible, sense of place, historical importance, moderate- high upgrade cost, readiness for tourism
5	Bothas Pass (viewpoint)	Interpretation boards	Easily accessible, sense of place, moderate historical importance, very low upgrade cost, moderate readiness for tourism.

2) IMPROVEMENTS REQUIRED AT THE BATTLEFIELDS IN AMAJUBA (AMAJUBA ROUTES AND GUIDES ASSOCIATION)

Fort Amiel: This is a municipal Museum and well run however it is not open on weekends except for a couple of hours on Saturday morning. It would be better to be open over the weekend and closed for a day during the week.

The Battlefield at Schuinshoogte: This site is easily accessible but the interpretative plaque has been stolen.

The British Military Cemetery and British camp site at Mount Prospect: This site is problematic in that the only easy access is through a neighbouring farm and quite rightly the farmer is not willing to allow free access through the gates. The current arrangement is that only people accompanied by a registered guide who has cleared the visit with him before hand may go through. Even when allowed through it is about a km from the N11 on two wheel tracks and sometimes in summer these are not always visible and it is necessary to walk because of the rocks in the grass.

O'Neill's Cottage: The cottage is in a very poor state and in desperate need of renovations. The Heritage Commission from the Voortrekker Monument have recently taken some control of the site and are looking into the possibilities of improving the situation but they are going to need financial assistance both to renovate the site and to maintain it. I would guess around R500 000 for renovations and improvements to the access road.

The sad fact is that like so many of these sites the cost of the work will never been returned in the number of visitors that will visit the site. One has to think of them in terms retaining heritage.

The Battlefield at Laing's (Lang's) Nek

Recently the Commonwealth Graves Commission cleared the site of the 58th Regiment Monument and located and cleared 9 of the mass graves down the hillside which now makes this site an interesting one to visit. However these sites are roughly 1.5km across Deane's Hill from the N11 with the only access a very rough, steep, two wheel, track that one needs a 4x4 in order to cross or one must hike. The site is also on private farm land belonging to the Charlestown Community Trust and one must obtain permission before entering. So like Mt Prospect this makes it impossible for casual visitors.

It would be nice to have an improved track across the hill and a cattle grid at the entrance gate so that visitors could cross the hill more easily. Unfortunately we are probably looking at R750 000 just for a gravel single vehicle track. It would also be necessary for the Trust to be willing to let visitors cross unannounced.

Another improvement would be if the wattle trees in front of the view site on the N11 were cleared and the interpretive notice was replaced then at least people could view the site from the road as they did in the past.

The Battlefield at Majuba

This site is on the Majuba Commemorative Farm and belongs to the Amajuba Boerevolk Trust.



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There are ablutions and picnic sites on the Nek below the mountain and there is a large Youth Hostel on the site. Unfortunately the climb up the mountain is via a very steep and very rough path which is somewhat dangerous and takes at least 40mins to make the climb to the top which rules out visiting the site for many people.

The 360 degree view from the top is spectacular and if a respectable concrete path of steps with a handrail were installed it would most certainly increase the number of visitors to this site and may even bring it up to a "must do" status. The spin off from this would be more people visiting the other sites related to this War.

I would hesitate to guesstimate that the cost of these steps would be in the region of R1.5 million and the problem arises in putting all this money into what is ostensibly private property with the owners retaining the right to restrict entry.

The Armoury & The Military Cemetery (In the centre of the Old Town Cemetery)

Both these sites are supposedly maintained by the Newcastle Municipality but in fact the Military Cemetery was badly neglected and only recently restored by the Commonwealth Graves commission. The Armoury is used by the MOTHs and is not open to the public except in the presence of a member of the MOTHs.

Sites in Utrecht

Most of these sites have been renovated and restored in the last 5 years and are a pleasure to visit. However they are not open at weekends and with only one caretaker it is better to make an appointment to avoid disappointment.

The Battle of Bloedrivierpoort site (From the Anglo Boer War and not to be confused with the Battle of Blood River)

The site is on private farm land but the farmer has no problem with visitors as the site is just off his main access road and does not affect his farming. In 12 years of Guiding I have only been asked twice to take people there.

Impact of the European Capital of Culture Award, Liverpool, 2008

CULTURAL ACCESS AND PARTICIPATION

During the period 2006-2008 considerably wider cultural engagement occurred in both Liverpool and the North West region, including:

- A 10% rise each year in arts audiences across Liverpool
- Higher levels of interest in going to museums and galleries in Liverpool than elsewhere in the UK, sustained across the ECoC period
- A drop in the proportion of people in Liverpool who daimed to have no interest in culture
- A 50% rise in visitor figures to Merseyside's seven largest attractions since 2004, peaking at 5.5 million people in 2008.

2 ECONOMY AND TOURISM

Visiting Liverpool ECoC

- The Liverpool ECoC attracted 9.7 million additional visits to Liverpool, constituting 35% of all visits to the city in 2008.
- These visits generated an economic impact of £753.8 million (additional direct visitor spend) across Liverpool, Merseyside and the wider North West region.
- 2.6 million European and global visits were motivated by the Liverpool ECoC in 2008.
 97% of these were first-time visits to the city.
- The ECoC generated an additional 1.14 million staying visitor nights in Liverpool hotels, 1.29 million in the rest of Merseyside and 1.7 million in the rest of the North West.

3 CULTURAL VIBRANCY

Since ECoC nomination in 2003

- National and local media coverage on Liverpool's cultural offer has more than doubled and in 2008, positive stories on the city's cultural assets dominated over the traditional emphasis on (negative) social issues.
- Liverpool culture stories have diversified from the traditional focus on popular music and the built heritage to the visual and performing arts, and growing references to Liverpool's creative industries.
- The city's cultural sector has developed strong networks, which have resulted in the securing of multimillion pound national grants. These include the Liverpool Arts Regeneration Consortium and the Small and Medium Arts Collective, in addition to the previously established Arts and Culture Network.

4 IMAGE AND PERCEPTIONS

Liverpool's media representation has become less polarised since the mid 1990s

 The traditional contrast between negative reporting on social issues and positive stories on city icons has been replaced by a wealth of stories on current cultural offer and economic change.

Online social media

- flickr (50,000 Liverpool ECoC photographs)
- YouTube (2,200 dips, 2.5m views)
- Facebook (500 new group pages, 13,000 members)
- Google (Liverpool ECoC searches comparable to football searches).

People's awareness and perceptions

 From 2005 to 2008 overall positive impressions of Liverpool increased amongst the UK population (from 53% to 60%) while negative views dropped from 20% to 14%.

GOVERNANCE AND DELIVERY PROCESS

 Liverpool's approach to ECoC governance was the result of extensive partnership across public, private and third sectors.
 This has contributed to the repositioning of culture as more central to cross-sectoral agendas, and is reflected in a new city-wide cultural strategy for 2008 to 2013.



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4) NEWCASTLE AIRPORT (KZN MUNICIPAL AIRPORTS PROJECT)

BACKGROUND:

According to an annual licensing audit by the SACAA Newcastle Airport operations at the capacity of category 2. The airport administration matters are located within the Economic development and Planning Unit of the Newcastle Municipality. While operations are outsourced to a private company. A feasibility study (2005), flights and related activities at Newcastle Airport declined significantly since the 1970s and 1980s, when huge investments around Iscor stimulated major growth in the regional economy. The airport supported around 50,000 passenger flights annually. Since then, "the decline of the regional economy over the past two decades has reduced traffic at the airport to a trickle". Currently, the average flights landing per month is roughly 406 for July 2011. In may be stated that while some of the recommendations from the study have been underway, the uptake for capacity funding and related upgrades have been slow in light of poor demand among related issues. The study recommends the Newcastle Airport to adopt a 'migration' strategy of re-launching the airport services on the Johannesburg route followed by a Durban route as demand arises. Income is generated from landing fees and from the sale of avgas.

Income from landing and departure fees hangar rentals and avgas average R1R2000 per month. Current landing fees are benchmarked at 70% of the tariff applicable to State Airports. Parking fees are charged at R11.00 per day, irrespective of the size or weight of the aircraft. Whilst this is in line with the 70% ACSA benchmark for light aircraft (up to 2000 kgs) it would obviously be quite below benchmark rates for mid-sized aircraft.

According to the Airport Manager, there are currently 20 hangars at the airport, some owned privately and some by the municipality. Hangar rental charges vary based on when contracts were entered into. Information from the KZN Airstrip Study suggests that average hangar rentals are substantially below market rates. Hence it is implied that income from sale of Avgas and rental is below par required for adequate maintenance of the facility.

Users: Privateers are predominately users of this airport followed by helicopter emergency and other non-scheduled general aviation activities as training, re-routing of private airplanes due to inclement weather and the like.

FLIGHT ACTIVITY

The main current users of the airport are private light aircraft owners, who use the airport primarily for leisure purposes. In addition, there are a number of ad hoc charters (typically 6-seaters) carrying business passengers to and from Johannesburg and Durban. In recent years, charter services were run out of the airport by companies including New Heights (who had a scheduled service running until recently), Magnum/LinkAir, and MacAirlines. For various reasons all of these services were discontinued. Els Air Aviation is the only charter operation currently based out of Newcastle,





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although other services come into Newcastle from bases in Durban or Johannesburg. On average, there are 3-4 charter flights each week through the airport. In total 304 aircraft movements were recorded at Newcastle in 2004, with 777 total passengers coming through the airport. There was one accident 5 years ago during an air show. Occasionally, there are incidents when pilots forget to lower landing wheels on approaching the airport.

INFRASTRUCTURE SPECIFICATIONS:

The runway surface is asphalt with a length of 1500m and elevation of 1,251 m. The fire engine is stationed approximately 8 kilometres from the airport, hence no fire station on site. There is 24hour security as per personnel rotation. In the event of a large aircraft should land at the airport the fire department team is notified in advance to be present at the airport as the need arose. Navigational technology equipment such as, the radio beacon, weather station system, night landing facilities are activated by pilots upon landing aircrafts.

CHALLENGES/NEEDS:

Key challenges are related to maintenance and required capital expenditure and coordination of governance activities related to the maintenance of the airport as the airport accounts has been handled across various municipal departments.

Capital and recurring expenditure for maintenance is required for the effective performance of the facility. In particular, the highway linked to the airport or equipment and 2 fire hydrants on the western side of the hangars have not been connected to the water supply. The water connection for the fire engine, which is situated on the eastern side of the aircraft parking apron, has no water pressure at all and is thus useless for fire extinguishing purposes. Electric fencing is required to stave off cattle and other animals as well as the need to facilitate traffic during peak hours on the Madadeni Route as the same exit is shared with the dumping site and the airport.

In last year's budget an amount of R100, 000 allocated for the complete renovation of the toilets/bathrooms in the airport building. The renovation is still pending.

OUTLOOK

A feasibility study completed in 2008 established the viability of integrating a hydroponic plant near the airport. It is envisaged that the plant will be used to store agricultural produce in the medium term thereby increasing the potential usage of the airport via freight. Hence, it is envisaged that as the largest runway in Northern KwaZulu-Natal increased flight activity related to freight and the movement of fresh produce or agri-processed goods produced in the region will facilitate trade support to various locations as Johannesburg and beyond.

Reference: Draft Status Quo, Municipal Airports Project, School of Development Studies, UKZN, On behalf of DEDT



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5) ACCOMMODATION SEPARATED BY LOCAL MUNICIPALITY

Accommodation Name	Type of Accommodation	Location
JNB Lodge	Lodges	Dannhauser
KwaLanga	Lodges	Dannhauser
Lloyds Baai	lodges	Dannhauser
Charl-marie Chalets	Self Catering	Dannhauser
Kwalanga	Self Catering	Dannhauser
Aloes Country Lodge	Lodges	Emadlangeni
Bivane River Lodge	Lodges	Emadlangeni
Bivane Wetland Reserve	Wetland reserve	Emadlangeni
Luiperd kloof trout lodge	Lodges	Emadlangeni
2 The End	Bed and breakfast	Newcastle
Amajuba mountain and commemorative farm	Guest farm and museum	Newcastle
Arbor Farm lodge	Lodges	Newcastle
Ashdene B&B	Bed and Breakfast	Newcastle
Avalon guest Manor	Bed and Breakfast	Newcastle
Balele Community Game Park and Caravan resort	Guest farm	Newcastle
Belvederes B&B	Bed and breakfast	Newcastle
Blackrock Garden Court	Hotels	Newcastle
Blood River Outspan Lodge	Lodges	Newcastle
Blue Ridge Guest Farm	Guest Farm	Newcastle
Camelot Guest House	Bed and Breakfast	Newcastle
Cannon Lodge	Lodges	Newcastle
Capricorna	Hotels	Newcastle
Century Place B&B	Bed and Breakfast	Newcastle
Comfit-Zone	Bed and Breakfast	Newcastle
D&H Lodgings	Budget Accommodation	Newcastle
Dunga House	Bed and Breakfast	Newcastle
Eco Park Private Game Farm	Guest Farm	Newcastle
Engogo Riverside Lodge	Lodges	Newcastle
Farmhouse Lodge	Lodges	Newcastle
Gracelands Guesthouse	Bed and Breakfast	Newcastle
Greaves Street B&B	Bed and Breakfast	Newcastle
Grey Goose Equastrian Centre	Equestrian Centre	Newcastle
Guest House Kestrels	Bed and Breakfast	Newcastle





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Haggards Hilldrop	Bed and Breakfast	Newcastle
Heritage House	Bed and Breakfast	Newcastle
Home & Away Guest House	Bed and Breakfast	Newcastle
Horizon restaurant	Restaurants	Newcastle
House Ebony	Bed and Breakfast	Newcastle
Ikhasi Lodge	Lodges	Newcastle
Iphiva Lodge	Lodges	Newcastle
Isidingo Guest House	Bed and Breakfast	Newcastle
Izinga Guesthouse	Bed and Breakfast	Newcastle
Jabulujule Guest House	Bed and Breakfast	Newcastle
Khaya Mini	Lodges	Newcastle
Klipsringer	Self Catering	Newcastle
KwaNtulindawo Guest House	Bed and Breakfast	Newcastle
Loli's B&B	Bed and Breakfast	Newcastle
Majuba Lodge	Lodges	Newcastle
Monikas Guest House	Bed and breakfast	Newcastle
Mountain View Guest House	Bed and breakfast	Newcastle
Newbali B&B	Bed and Breakfast	Newcastle
Newcastle Country Lodge	Lodges	Newcastle
Newcastle inn	Hotels	Newcastle
Patterson B&B	Bed and Breakfast	Newcastle
Phumula Nathi Motel	Bed and Breakfast	Newcastle
Robin's Nest B&B	Bed and Breakfast	Newcastle
Rus n Bietjie	Caravan Park	Newcastle
Santorini Suites	Hotels	Newcastle
Sintokha Guest House	Bed and Breakfast	Newcastle
Siyaphumula B&B	Bed and Breakfast	Newcastle
Sizakancane Hotel	Hotels	Newcastle
The Haven	Hotels	Newcastle
The Oak Tree	Lodges	Newcastle
Tiger's kloof B&B	Bed and breakfast	Newcastle
Tourism Newcastle	Tourism office	Newcastle
Tramonto Boutique Hotel	Hotels	Newcastle
Victoria Self Catering	Self Catering	Newcastle
Vulintaba Country estate	Holiday resort	Newcastle
Walala B&B	Bed and breakfast	Newcastle
Zamambongi Guest House	Bed and breakfast	Newcastle
Zinyathi Lodge	Lodges	Newcastle
Zipho's B&B	Bed and breakfast	Newcastle
Zodiac B&B	Bed and breakfast	Newcastle

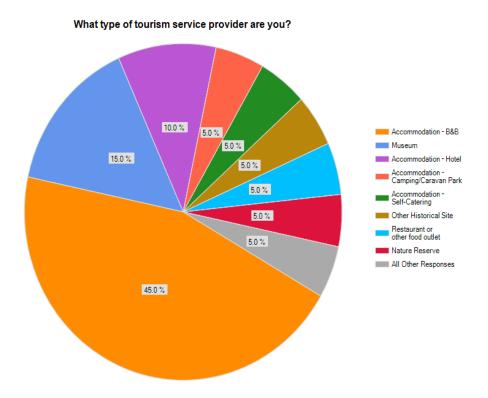
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6) SURVEY RESULTS

The following results are from a survey conducted by Urban-Econ of service providers in Amajuba. The survey was conducted online and sent to all service providers, excluding support services, (accommodation and attractions only) in Newcastle. The survey received a 20% response rate.

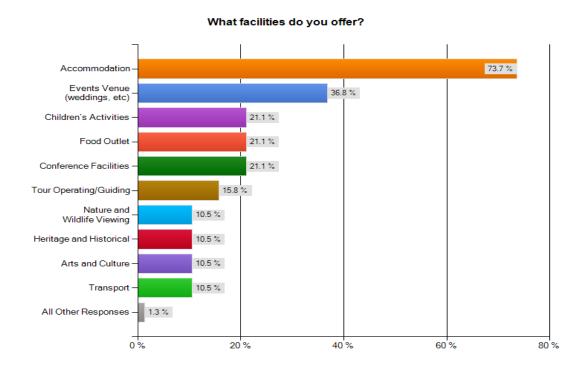
TYPE OF TOURISM SERVICE PROVIDER: 45% of all responses were B&Bs. This reflects the proportionally large number of B&Bs in Newcastle. 15% of all responses were museums, and 10% hotels.



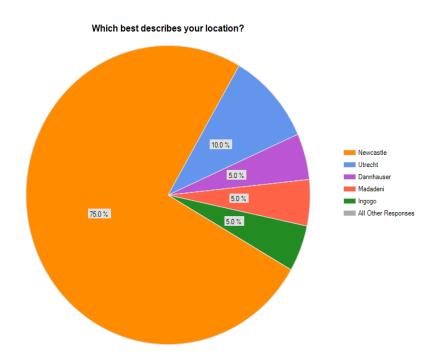
TYPE OF FACILITIES OFFERED: The graph below describes the facilities offered by the service providers depicted in the previous graph. As expected, 74% offer accommodation facilities. Interestingly, 37% offer function facilities, reflecting that there is demand for function venues. 22% offer children's' activities, food, and conference facilities.



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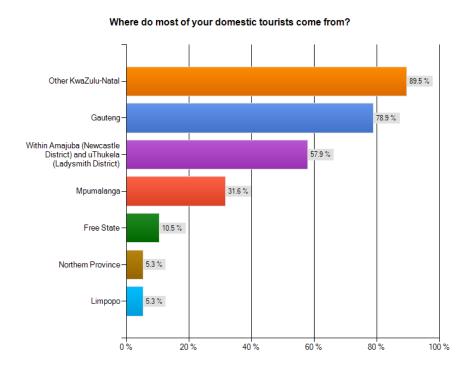
LOCATION OF SERVICE PROVIDERS: Most tourism service providers are in Newcastle (75%) which reflects the amount of business travellers. 10% of the service providers operate out of Utrecht, and the rest of the towns such as Dannhauser, Madadeni and Ingongo occupy only 5% each.



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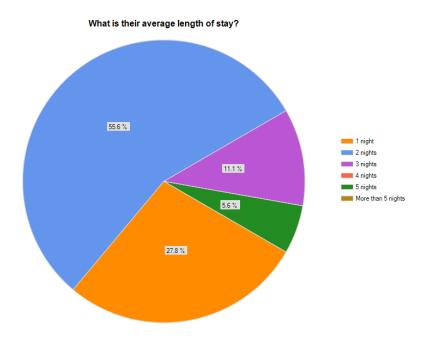
ORIGIN OF DOMESTIC TOURISTS: A large percentage of domestic tourists come from around KwaZulu-Natal (89.5%), Gauteng (78.9%) and within AmaJuba District and uThukela District (57.9%). Almost no tourists come from the Western Cape, Eastern Cape and the North West.



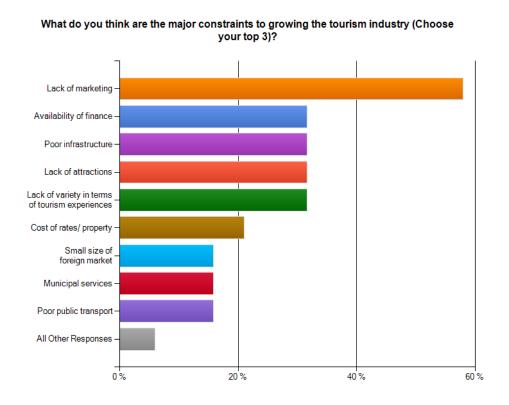
LENGTH OF STAY: About 56.6% of the visitors stay 2 nights and 11.1% stay 3 nights on average. A very small percentage of the visitors stay for 5 nights (5.6%) on average, this may suggest that Newcastle is not considered a tourism destination rather a business, or stop-over destination.

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CONSTRAINTS TO THE TOURISM INDUSTRY IN AMAJUBA: There are many major constraints to the growing of the tourism industry in AmaJuba but the one that has stood out is the lack of marketing. Not many people are aware that Newcastle is a tourism destination with as many attractions as it has. 30 % of service providers responded that availability of finance, poor infrastructure and lack of attractions and variety thereof, were major constraints to growing the tourism industry.



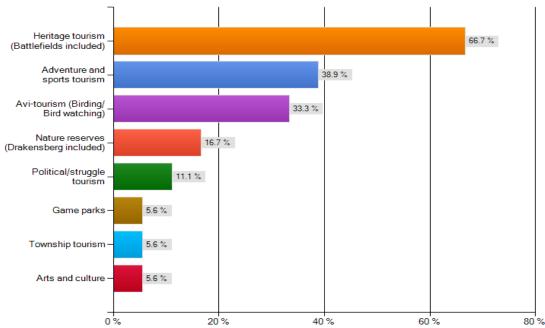




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MOST VALUABLE TOURISM ATTRACTIONS: 67% of service providers feel that heritage tourism best promotes Amajuba as a tourism destination. Over 30% of service providers felt that adventure and sports tourism, as well as avi-tourism had the best chance of attracting tourists to Amajuba.

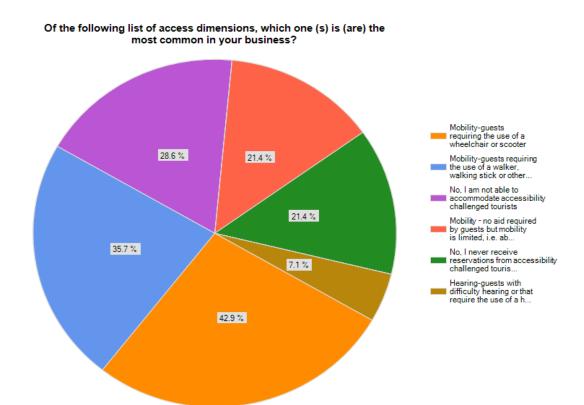
What do you feel best promotes your district as a tourism destination?



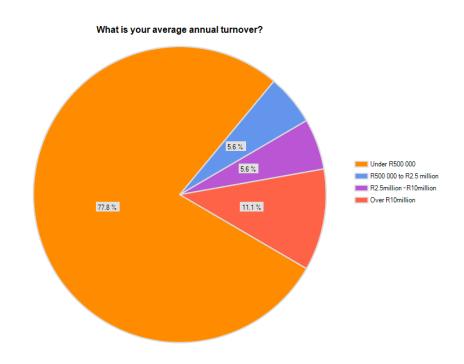
ACCES DIMENSIONS: The following graph describes the types of disabilities that travellers have, according to service providers. The most common disability is mobility – 43% of service providers say that they have received guests who require the use of a wheelchair or scooter. 36% of service providers have come into contact with guests who require a walker. 28% of service providers said that they are not able to accommodate accessibility challenged tourists, which is alarmingly high.



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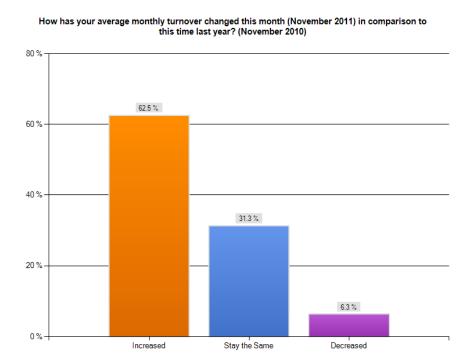
AVERAGE ANNUAL TURNOVER: 77.8% of the service providers earn less than R500 000, which shows that most service providers are small businesses. 11% have an annual average turnover of over R10million.



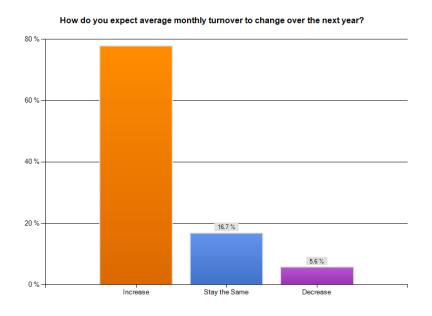


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BUSINESS GROWTH IN 2011: As compared to November 2010, the average monthly turnover in November 2011 for about 62.5% of the service providers had increased. For just above 30% of the service providers no change on their average monthly turnover was reported, only 6% of service providers revenue had decreased.



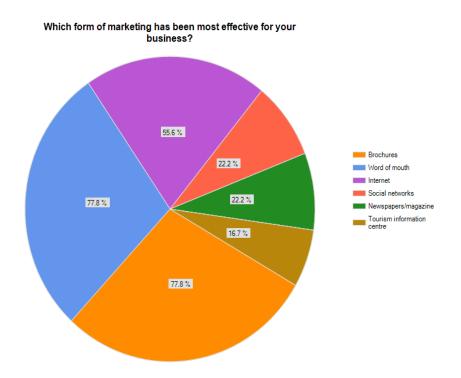
BUSINESS CONFIDENCE: Almost 80% of service providers expect revenue to increase in 2012 when compared to 2011. This reflects good business confidence. 17% expect it to stay the same, and only 6% expect it to decrease.





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MARKETING: Brochures and 'word of mouth' have been found to be the most effective marketing tools by most service providers. This is followed by the internet, social networks and newspapers or magazines. The least effective tool is the tourism information centre – this reflects that the info centre is not performing.



MARKETING: About 89.5% of the businesses take it as their own initiative to market themselves to the public and they receive little to no assistance either from the municipality or TKZN. This is part of the reason why marketing is considered the biggest constraint to growth by most service providers.

