Hlabisa Local Municipality

Tourism Strategy

MAY 2011

Hlabisa Local Municipality

Department of Economic Development and Tourism
Umnyango Wezokuthuthukiswa
Komnotho Nezokuvakasha

KWAZULU NATAL PROVINCIAL GOVERNMENT

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1. INTRODUCTION

Hlabisa Local Municipality is located approximately 50kms inland from KwaZulu-Natal's upper north coast, in Umkhanyakude District Municipality. It is surrounded by internationally renowned tourism attractions mainly to its north, east and west and hosts South Africa's most important tourism corridor to Mozambique/ Swaziland (N2). Tourism attractions surrounding Hlabisa Local Municipality include South Africa's oldest Game Reserve (Hluhluwe-Imfolozi Game Reserve), South Africa's first World Heritage site (Isimangaliso Wetlands Park), and South Africa's main Zulu historical/ heritage node (eMakhosini at Ulundi and surrounds).

However, despite such impressive levels of tourism activity within its surrounds, Hlabisa Local Municipality has virtually no officially recorded tourism products within its vicinity, and experiences limited levels of tourism leakage and expenditure into the Municipality. The tourism state in Hlabisa is distinctly peculiar in this regard. Until recent demarcation changes, the oldest and one of the most well renowned game reserves in South Africa protruded into the local municipal area, almost dividing it in half- yet the municipal area itself had only one officially recorded tourism product[1], [2].

Within South Africa's developmental state, the tourism industry is most importantly valued for its ability to contribute to socio-economic development accelerators such as employment, small business development and income creation. Hlabisa Local Municipality is of particular importance in this regard, as a completely rural municipality with limited levels of socio-economic development. Rural municipalities like Hlabisa Municipality are in fact identified as a strategic area of intervention by the 2010 National Tourism Strategy, which aims to aggressively address issues of geographical and rural spread of tourism in the country.

It is in light of this that KZN DEDT- with the aim to assist its municipalities to fulfil their development mandate, has partnered with Hlabisa Local Municipality to produce the first comprehensive tourism strategy for the Municipality. It must also be noted that the development of the tourism strategy comes at a significant time in the demarcation of the Municipality's boundaries. Twelve of the current twenty wards of the Municipality are soon to be transferred to the neighbouring Mtubatuba Municipality- leaving Hlabisa Municipality reduced to almost half its original size. The Municipality will lose its only current tourism product, and as well as the economic and spatial advantage of housing the regional corridor (N2) within its boundaries. Despite this challenge, the Municipality still possesses tourism potential, and it is through strategy that this potential will be translated into tangible tourism development.

1.1. THE STRATEGY DEVELOPMENT PROCESS

The process of the development of the tourism strategy was divided into five work phases. The phases are as follows:

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[1] The Hluhluwe-Imfolozi Game Reserve is a district management area (DMA) serviced and managed by KZN Ezemvelo Wildlife and therefore not often classified as being part of the Municipality. However, plans are underway for this the Municipal area to be reduced, and with this, the DMA to be officially incorporated into the Municipal area as the last ward (Ward 8) of the Municipality.

[2] The Zamimpilo Arts and Crafts Market, located a few meters west off the N2/ P495 intersection.

Work Phase One: Project Orientation and Inception

In this phase, the tourism industry of Hlabisa is initially reviewed, and the work plan for strategy formulation is developed and detailed.

Work Phase Two: Contextual Analysis

In this work phase, the current socio-economic and tourism status quo of the Local Municipality are reviewed. Key policy and legislation relevant to tourism in Hlabisa are also addressed. This phase includes:

- o   Situational Analysis (including policy and programme review)
- o   Destination Situational Analysis

SWOT and Gap Analysis.

Work Phase Three: Tourism Strategy

In this work phase, strategies to plan for the development the tourism sector both to contribute to the local economy, and to contribute to the overall socio-economic status of the local municipality are suggested. These are packaged in projects, which are presented in conceptual form to tourism stakeholders within the Municipality, and thereafter consolidated as projects into the report.

Work Phase Four: Project Design

This section of the project takes the projects identified in this phase and unpacks them in more detail in terms of time frames, stakeholders, funders and budgets. They are thereafter packaged into implementable projects.

Work Phase Five: Implementation Plan

This phase addresses the projects earlier identified and unpacks an action plan in terms of actions, timeframes, roles, and responsibilities, and monitoring and evaluation.

Work Phase Six: Close Out Report

This work phase is administrative in nature, and closes off the entire planning process which, hereafter, will be launched into implementation.

2. SITUATIONAL ANALYSIS

A good understanding of the Municipality and its surrounds is necessary for effective planning. In arriving at a concise and effective strategy for Hlabisa Municipality, a thorough situational analysis was conducted. In identifying the key challenges and opportunities in the Municipality, it is important to remember that tourism is recognised as a system and that all components need to be in place for the tourism sector to operate optimally. The various components of tourism in the Municipality are addressed below in arriving at a strategic stance on tourism. The components include the institutional and policy environment, the location issues as well as tourism demand and tourism supply issues. A resulting SWOT and Gap analysis lead to the strategic component of the strategy.

2.1.   INSTITUTIONAL AND POLICY ENVIRONMENT

The following legislation, policy, strategy and institutional bodies are identified as being key for tourism development in Hlabisa:

- ✓ **National Institutions, National Legislation, National Policies and Programmes**
  - o National Tourism Sector Strategy, 2010
  - o National Heritage Act (No. 25 Of 1999)
- ✓ **Provincial Institutions, Provincial Legislation, Provincial Policies And Programmes, Other Provincial Policies And Programmes**
  - o Tourism Kwazulu-Natal
  - o TKZN- Towards an Effective Segmentation Approach For The Kwazulu-Natal Domestic Tourism Market (2009) (5th Edition)
  - o TKZN- Towards An Effective Segmentation Approach For The Kwazulu-Natal International Tourism Market (2010) (6th Edition)
  - o Amafa KZN
- ✓ **District, Regional and Local Institutions, National Legislation, National Policies and Programmes**
  - o Umkhanyakude District Municipality
  - o Elephant Coast Tourism Association
  - o Umhlosinga Development Agency
  - o Hlabisa Local Municipality
  - o Hlabisa Local Municipality Tourism Sub Forum

From the district and local institutional analysis, a number of key conclusions are drawn. These conclusions have been carefully assessed to direct the strategic way forward of the Hlabisa tourism sector. The following key conclusions are drawn:

- ✓ Tourism is a national priority

- ✓ Job creation within tourism is a key, national , provincial and local priority in tourism

- ✓ There is a national focus on the geographical, rural and seasonal spread of tourism, which is important for Hlabisa (rural)

- ✓ There is a heavy focus on green and energy saving infrastructure and tourism

✓ Cultural/ heritage assets are sensitive and have much value for tourism, and must be addressed in Hlabisa

✓ According to the International Tourism Competitiveness Report, Elephant Coast is an internationally untapped tourism gem. Hlabisa Municipality therefore lies within and belongs to a tourism region which is yet to be explored internationally. With sufficient marketing, tourism within the Elephant Coast is set to grow, making it necessary for H;abisa to receive this growth.

2.2.   LOCATIONAL CONTEXTUAL ANALYSIS

Hlabisa Local Municipality is located in Umkhanyakude District Municipality in northern KwaZulu-Natal. It is one of four category B municipalities in the District. It is just over 200km north from Durban, approximately 160kms south from Mozambique, and 90kms south of Swaziland.

Hlabisa Municipality is located within one of KZN's prime tourism regions, branded as the Elephant Coast. The Elephant Coast stretches approximately 180kms across from the coast inland, and approximately 192kms north from Mtubatuba Local Municipality to the Mozambique border in the north. Hlabisa Local Municipality is located within the south-west of the Elephant Coast as illustrated below:
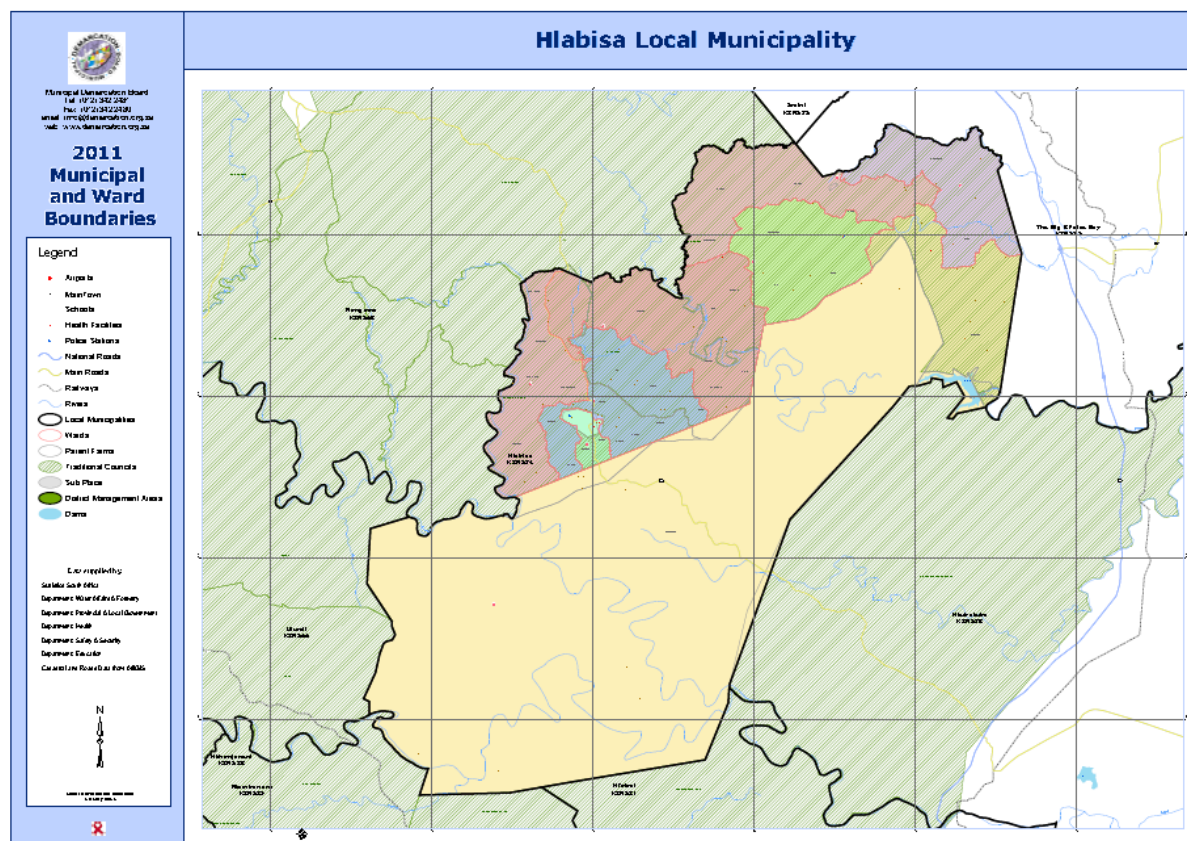
Figure 1- Hlabisa Local Municipality3
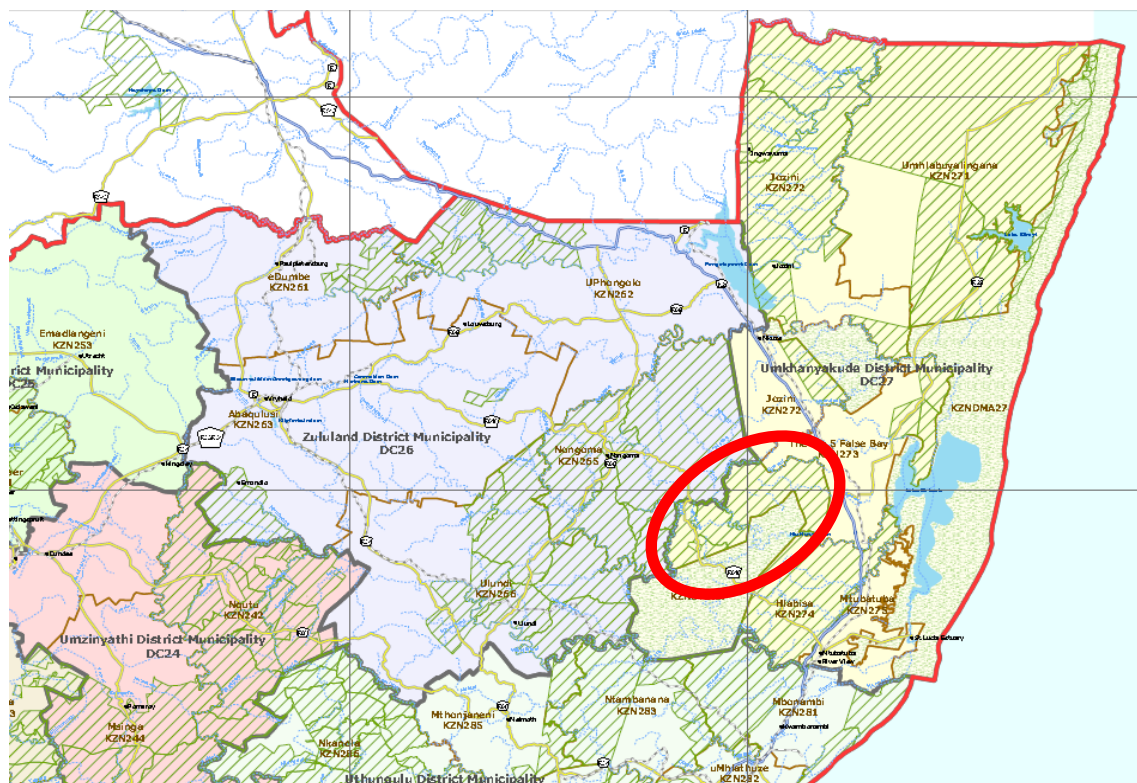
SOURCE: ADAPTED FROM HLABISA LED STRATEGY, 2010

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[3] It has recently been Gazetted that within 2011, Hlabisa Municipality will lose 12 wards, and be reduced to wards 1-8 (wards 8 being the Game Reserve). The wards that remain will be those that are west of the Game Reserve. Because of the recency of the decision to restructure the Municipality, most current images of Hlabisa Municipality mostly still include the wards east of the Game Reserve.

Hlabisa Local Municipality is completely rural, and (until recent demarcations changes) was divided into four areas under traditional leadership. The traditional areas include Abakwahlabisa to the south west; Mpembeni to the west; Mdletshe to the north, and Mpukonyoni/ Mkwhanazi occupying the whole east region, and the majority of the south. Due to demarcation changes, the Mpukonyoni traditional authority has now been transferred to Mtubatuba Local Municipality.

SOURCE: DEMARCATION BOARD, 2011

At present Hlabisa Municipality's only urban nodes are Hlabisa in Amatshamnyama (Hlabisa Traditional area), with Hlabisa Town being the Municipality's primary node. Hlabisa's only secondary node is include Mthekwini- along its eastern border.

The Hlabisa Municipality Integrated Development Plan for 2006- 2011(2009- 2010 review) notes that further development and hierarchy of nodes needs to be achieved. Hlabisa Town is still earmarked as the primary node, with Somkhele and Mfekayi still noted as secondary nodes. This therefore still needs to be updated to reflect the current demarcation, where Mthekwini would be earmarked for development as a secondary node.

Table 1- Hlabisa Service Nodes to be Developed

NODAL HEIRARCHY OF PLANNING AREAS	ECONOMIC AND SOCIAL FUNCTION	TYPE OF SERVICE TO BE DEVELOPED
Primary (Sub-	✓ Distribution and coordination point	Police Station, Hospital, Welfare Office, Schools,

NODAL HEIRARCHY OF PLANNING AREAS	ECONOMIC AND SOCIAL FUNCTION	TYPE OF SERVICE TO BE DEVELOPED
regional Centre) – Hlabisa Town	✓ Higher order level of goods and services	Community Hall, Post Office, Bank, Court, Comprehensive sport facility, Developed Economic Centre, Information Service Centre, Emergency Service Centre
Secondary (Community Centre) - Zibayeni , Somkele and Mfekayi	✓ Lower order level of goods and services as compared to primary node	Police Satellite Station, 24hr clinic, Weekly Welfare Mobile Services, Schools, MPCC, Weekly Information Mobile Services, Post Net, Mobile Bank Services, Tribal Court, Basic Sport Facility
Tertiary (Neighbourhood Centre) - Mthekwini, Mpembeni, Mganwini, Ngebeza, Nkodibe	✓ Serve to provide a convenient service to the village community	Mobile Clinic, Schools determined by population density, Community Halls determined by population density, Postal Services determined by population density, Basic Sport Facility

Source: Hlabisa Municipality Integrated Development Plan 2006 - 2011

There are two main primary corridors in the Municipality, namely the R618, connecting Hlabisa Town to the N2, and the road connecting Hlabisa node the N2 through Mthekwini. There is opportunity to utilise these nodes for tourism route development.

According to the District IDP (2010/11 review), within the District, Hlabisa, Mtubatuba and Mkuze are all identified as primary investment nodes. While all nodes are listed as being of the same hierarchy, in practice, Mtubatuba and Mkuze are significantly more developed and naturally attract more investment due to their location on the N2. They are also therefore both notable tourist service nodes. Conversely, Hlabisa is primarily a rural service node, and in practice is less developed and attracts less investment attention. Hlabisa will therefore have to more actively seek and attract investment. This is also important to note where the attractiveness of the town can support tourism interest, and where the lack of services and infrastructure in the town can work to deter tourism.

2.3.   REGIONAL TOURISM SPATIAL DYNAMICS

Tourism in Hlabisa Municipality is most clearly depicted when reviewed within the context of tourism in the broader area. A strategic direction on tourism will be most accurately determined once a clear understanding of the surrounding tourist activity, traffic, and tourism products is achieved. The various nodes, corridors and attractions inevitably influence the current and potential state of tourism in Hlabisa Local Municipality.

The map below indicates that Hlabisa Local Municipality is densely surrounded by a significant number of nature tourism sites, and particularly to the south, cultural or heritage sites and tourist stop points.

Figure 3-Hlabisa Local Municipality within broader regional tourism activity- conceptual illustration

Source: Adapted from Google Earth; Urban Econ Tourism, 2011
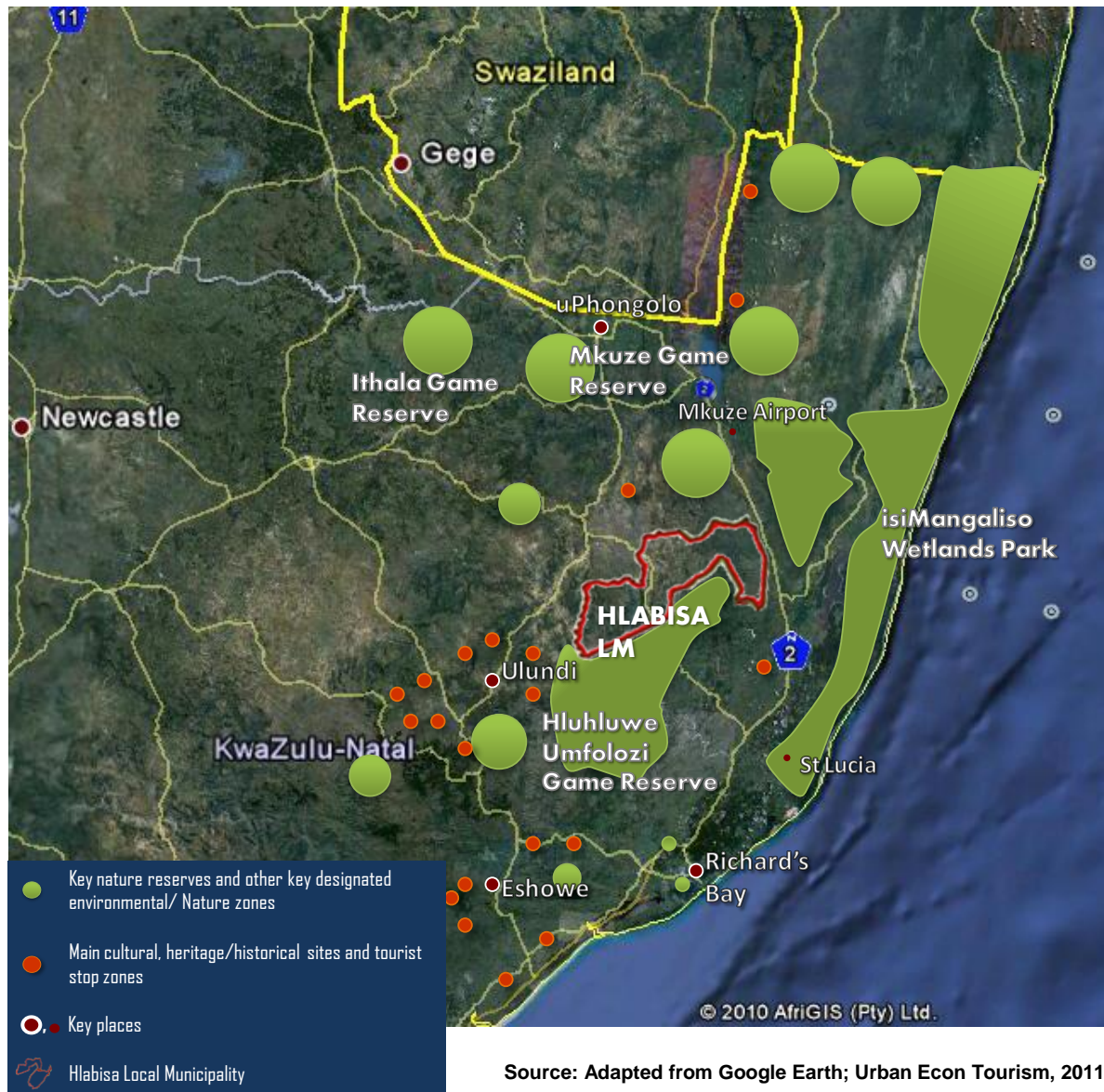
The map below illustrates that for the purposes of this Strategy, the catchment area relevant to Hlabisa Tourism is divided into the primary area, secondary area, and tertiary area of influence. The primary area is taken as the area within a 40 km radius from the approximate centre of the Municipality (as illustrated above)/ Game Reserve area. The secondary area is the area within a further 40km radius from the primary radius, and the tertiary area is as indicated below, bordering on Swaziland and Mozambique in the north and Port Dunford in the south. The tertiary tourism influence area ends along the coast on the east, and at Ithala Game reserve in the north west and the Nkandla Forest Reserve in the south west.

Figure 4- Conceptual illustration of primary, secondary and tertiary influence areas for Hlabisa Local Municipality tourism
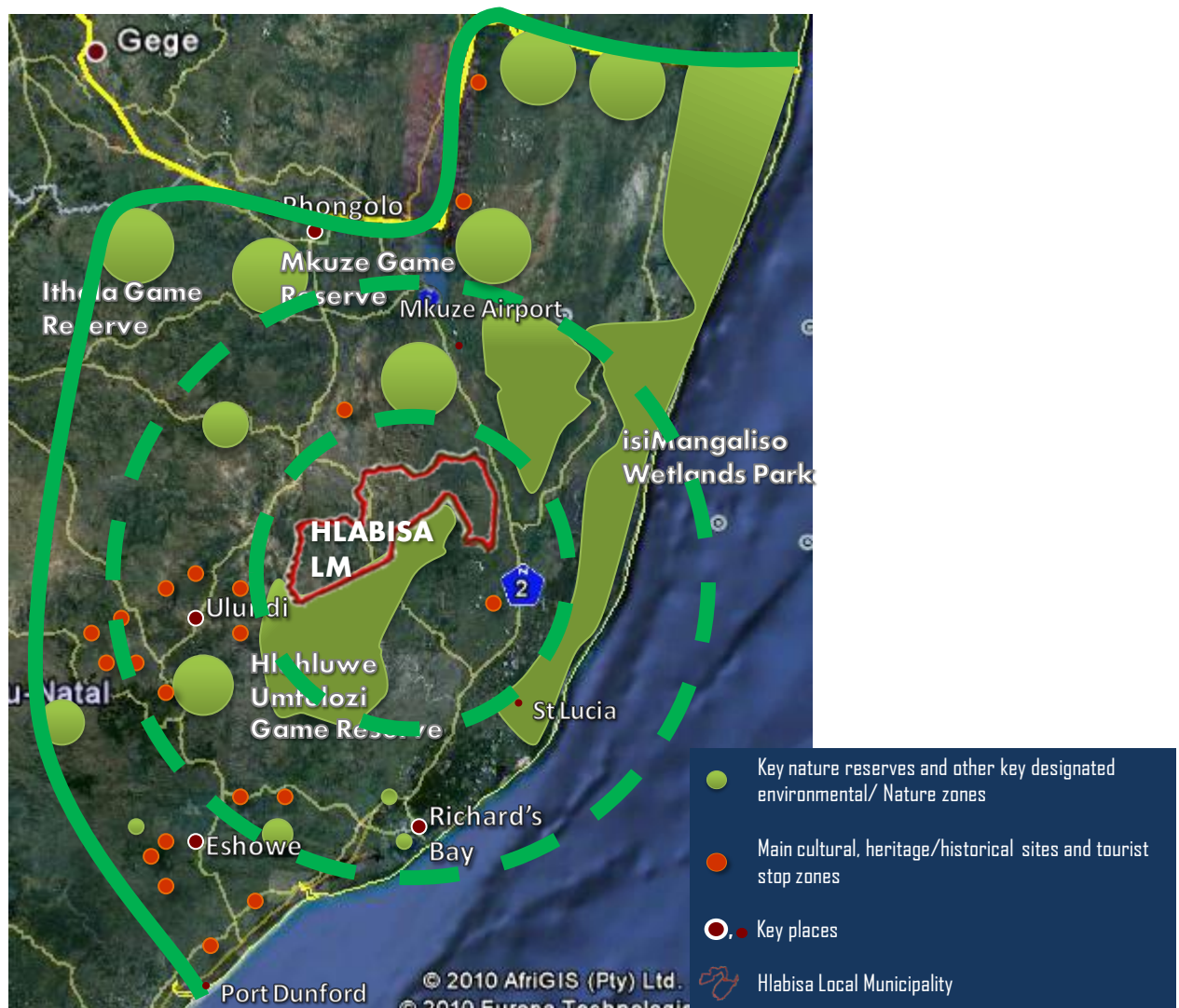
Source: Adapted from Google Earth; Urban Econ Tourism, 2011

Hlabisa Local Municipality lies in the south western corner of the Elephant Coast. Therefore while Hlabisa Local Municipality falls within the Elephant Coast tourism region, both the Elephant Coast and Zululand tourism regions are influential over the Municipality's potential tourism state. The influence of the Elephant Coast over Hlabisa's potential tourism is mainly nature conservation in the form of game and nature reserves in the east and north east. The two main tourist draw cards in the Elephant Coast are the Hluhluwe-Imfolozi Game Reserve- the oldest in the country, and the isiMangaliso Wetlands Park- South Africa's first world heritage site. The main tourism corridor is the N2, supporting traffic from the western/ inland regions of the country, Swaziland, Mozambique, and southern nodes such as Durban. The Zululand region borders west on Hlabisa Local Municipality, and its influence is strongest south west of Hlabisa- in the form of a concentration of Zulu historical and heritage cultural tourism. While the R66 is not as frequently used as the N2, it provides an opportunity to link to Hlabisa from Ulundi and further northward.

Important regional tourism corridors in both nodes also include the R22, R618(soon to be the most influential corridor of the Municipality), and the R66, while the N2 is the main corridor of influence.

As earlier highlighted, the tourism state in Hlabisa is peculiar in that the oldest and one of the most well renowned game reserves in South Africa protrudes into the (pre-redemarcated) local municipal area, almost dividing it in half- yet the municipal area itself has no officially recorded tourism products. Conversely, the Hluhluwe-Imfolozi Game Reserve is internationally and locally well renowned for its wide range of wildlife and fauna- in particular for the Big 5- highlighting the contrast between itself as a tourism attraction and Hlabisa Municipality.

Before demarcation of the Municipality, the only established tourism product was the Zamimpilo Arts and Crafts Market. Since the new Municipality is now demarcated west of the N2- apart from the Hluhluwe-Imfolozi Game Reserve, Hlabisa is effectively left without an official tourism product. The N2 is a particularly important tourism corridor for Hlabisa Municipality, as the primary economic corridor in the region. It carries tourism traffic from Swaziland through Mkuze in the north, and receives traffic from the Mozambique- Manguzi- Mbazwana- Hluhluwe tourism corridor in the north east. The traffic is carried down across and south to the Hluhluwe Game Reserve, and the St Lucia Wetlands Park, and then further south to toward Durban. The N2 also supports a significant amount of traffic during April and July local peak seasons, as the Elephant Coast region mainly acts as a corridor to Mozambique for the local market. Having flown into one of the country's main cities, international tourist traffic primarily travels on the N2, stopping off at the Hluhluwe-Imfolozi Game Park, then returning onto the N2 en route Durban. The Mthekwini region (near Memorial Gate of the Game Reserve) is therefore earmarked for Hlabisa Municipality tourism products as this will

More specifically, there is almost no tourist penetration into the local municipal area- making the old Hlabisa Local Municipality not more than a brief tourist stop off point en route the tourist's destination. However, the N2 presents a key strength in the potential development of the Municipality's tourism. The Memorial gate- R22/N2 intersection region is a strategic area to encourage tourist infiltration into the area.

strategically draw in primary national as well as international transient traffic.

The Municipality's secondary tourism influence area comprises both the Elephant Coast as well as Zululand. In this secondary influence area, the isiMangaliso Wetlands Park acts as the major regional tourist draw card, and again, draws traffic along the N2 economic corridor. International and local tourists travelling to the Wetlands Park mainly enter the region through the N2 from Durban, Johannesburg or Cape Town. Within the Wetlands Park there is a wide range of tourism products, including a nature and game park, conservancy, traditional Zulu lodges, and a range of water and adventure tourism activities. Throughout the secondary influence area there are also various other nature tourism attractions. Of these, the attractions include the Zululand Rhino Reserve; Thanda Private Game Reserve; AmaZulu Private Game Reserve; Mkhuze Falls Private Game Reserve; Ntendeka Wilderness Area; Ophathe Game Reserve; Ongoye Forest Reserve; Esikhawini Richards Bay Game Reserve and the Lake Esitha Game Reserve. Potential tourism in the Municipality will therefore largely be influenced by nature and nature conservation. Future tourism attractions in

Hlabisa should be those that compliment those existing in the secondary area in order to tap into the tourist base.

Specifically in the Zululand region south west of the Municipality, there is a concentration of Zulu heritage and historical sites, providing a strong influence of Zulu cultural tourism. This is mainly due to the node of Ulundi- which is a significant node in Zulu and South African history. Among these heritage sites are the site of King Shaka's Palace, the site of King Cetshwayo's Palace, the site of the Battle of Ulundi, Ophathe and Mgungundlovu; Dingaan's grave, as well as those of King Dinizulu and Piet Retief's graves. These cultural and heritage sites are in the process of being developed into a route along the R66- often referred to as the R66 Zulu Heritage Route. Within this region, there is also the Simunye Zulu Lodge, a well renowned community tourism lodge managed by Protea Hotels. The Emakhosini Valley is another well renowned but newly formed tourism development designed as an interactive museum which leverages off the rich heritage and history of the area. Further north along the R66, is the Mkuze Falls Private Game Reserve earlier mentioned. This game reserve is most often accessed from north off the N2, and not south through the R66, given that the heritage route is still largely in the process of development. Therefore there is relatively low tourist traffic along the R66 passing the Municipality. Instead most tourist traffic clusters in Melmoth/ Ulundi, and to the north west in Zululand's game reserves.

At present, tourist traffic that does travel along the R66 passes the Municipality and does not infiltrate Hlabisa, as there are no attractions in its north western region to deviate travellers. Nonetheless, the intersection of the R66 and the R618 regional corridor presents an opportunity to lead tourist traffic into the Municipality. This therefore presents an opportunity for future linkage with the R66 route.

The tertiary influence area is a further continuation of the existing secondary influence area, where the main potential influences include the N2, the R22 route to Mozambique, and the R66 Heritage route beginning in Gingindlovu and ending in Phongolo. The N2, branching off onto the R22 is an important route through which local Mozambique bound traffic crossing through the Municipality can be attracted for stops. The Zamimpilo Elephants Coast satellite office is well placed in this region, and can attract tourists into the Municipality.

2.4.   SOCIO-ECONOMIC PROFILE OF HLABISA

Hlabisa Municipality is a rural Municipality characterised by a strong presence of traditional leadership, each of the three traditional authority areas possessing its own Zulu character and customs. The present kings in leadership include Inkosi D J Hlabisa from the Mpembeni Traditional Authority area, Inkosi M Hlabisa from the Hlabisa Traditional Authority area and Inkosi Mdletshe, from the Mdletsheni Traditional Authority area. Induna Z Mkhwanazi from the Mpukonyoni Traditional Authority area has recently been incorporated into Mtubatuba Municipality. Among the distinctive cultures and customs of the four traditional authorities are specific dances which are peculiar to each traditional authority. It has been suggested, and planned by the Hlabisa Municipality that annually, members of all four traditional authority areas compete in a publicised festive event by dancing and showcasing each traditional authority's unique dance customs.

The tourism industry of any area is best developed when leveraging off its unique and competitive advantages. One unique and competitive advantage of Hlabisa is its four strong traditional groupings, and the associated cultures and customs. If marketed and organised well, the annual festival initiated by the Municipality can become a distinctive and attractive feature of Hlabisa tourism.

2.5. INSTITUTIONAL ANALYSIS

It is important to assess the institutional aspects of a tourism sector in order to determine whether it is able to handle necessary tourism development. In assessing Hlabisa's tourism institutional structure, four main conclusions are drawn.

The first is that while Umkhanyakude District Municipality is tasked with the development of sectors at the District level, hands on support in driving of tourism development and tourism activity in Hlabisa Municipality will be best carried out by UMDA and Elephant Coast. This is important to remember, for when specific projects are being developed.

Secondly, it must be anticipated that tourism in Hlabisa Local Municipality will develop beyond start up businesses, basic business awareness and small business skills development. In anticipating this, development of tourism within the Municipality will be best achieved when tourism is planned as a part of local economic development, and dedicated key tourism focused staff are supplied in support of the current role of the tourism and (enterprise development) officer. It will become necessary for identification and development of tourism products and will require resources, focus and attention which are not divided by the demands of basic business training and businesses from other sectors.

Thirdly, the role of Umkhanyakude in Hlabisa tourism in Hlabisa Municipality will be important as this will ensure provincial recognition of tourism projects.

Lastly, the functioning of the a tourism information office or a local office which plays this role (as was required of the Zamimpilo Satellite Office) is important in drawing tourists into the Municipality, and providing them with necessary information. It is therefore necessary that a Visitor's Information Centre is worked into the Strategy.

Necessary institutional recommendations are addressed in section four.

2.6. HLABISA TOURISM GAPS AND SWOT

The following sub- section addresses the entire analysis conducted of the area, and summarises this by identifying main strengths, weaknesses, opportunities and threats of Hlabisa Municipality's tourism sector. A gap analysis will thereafter direct actions for the strategic component of the tourism strategy.

2.6.1. SWOT ANALYSIS

The main strengths, weaknesses, opportunities and threats of Hlabisa Municipality with regards to tourism are as follows:

S/W/O/T	ISSUE EXTRACTED FROM CONTEXTUAL ANALYSIS
Strength	Community economic development focus of the Nature Reserve
Strength	Development orientated traditional authorities
Strength	Rich in cultural history
Strength	Still largely cultural (an advantage for international tourists who wants the 'real' and not staged experience)
Strength	Traditional dances every festive season, including craft and food exhibitions
Strength	Good relations between Hluhluwe-Imfolozi and the Municipality
Strength	Proximity to Nature Reserve
Strength	Rural KZN- serene and quiet- potential to be viewed by international tourists (esp. wonderlusters) as unspoilt
Weakness	Major tourism routes go around Hlabisa
Weakness	Roads which lead into Municipality mainly gravel/ dirt
Weakness	Cultural history largely undocumented and oral (i.e. more prone to be forgotten)
Weakness	Busy and stretched local municipal tourism staff (support required), especially as sector grows
Weakness	Limited infrastructure
Opportunity	The development of the road connecting Mkuze Airport to the R66
Opportunity	The linking of the R66 route to Hlabisa Local Municipality
Opportunity	Trails through the particularly rural sections of the Municipality, such as horse trails, and 4x4 trails- addresses strategic growth objective of 2010 National Tourism
Opportunity	Development of authentic cultural tourism experiences, opening up existing 'Ingoma' and craft and food exhibitions to tourists- advertising links between this and existing accommodation establishments in Hluhluwe
Opportunity	Development of oral history as a tourism feature of the Municipality, Zulu folklore

S/W/O/T	ISSUE EXTRACTED FROM CONTEXTUAL ANALYSIS
Opportunity	Adventure activities are not available in the primary area, and yet are in much demand
Opportunity	Tourism products (e.g. adventure tourism) aimed at national "young and upcoming" market segment- 5.1million individuals nationally
Threat	Malaria, as sector grows and traffic flows in from the north- if not stringently controlled
Threats	Uncontrolled tourism activity in the absence of by laws
Threats	Electricity cuts (collected from Nongoma)
Threats	Financial challenges from Umkhanyakude Municipality to Elephant Coast, at a time when both are needed for development of Hlabisa Local Municipality
Threats	Regular water problems (Municipal water collected from Jozini)
Threats	The loss of 12 wards along the N2 could divert tourist attention from the Municipality
Cross Cutting Principle	Tourism promotion, engage Potential and current investors to partner with communities in tourism development
Cross Cutting Principle	Development of green jobs in tourism products
Cross Cutting Principle	Hlabisa Municipality to be a leader in responsible tourism especially with regards to products
Cross Cutting Principle	Facilitate links between agricultural growers and caterers

2.6.2. GAP AND OPPORTUNITY ANALYSIS

The following table addresses more closely the weakness identified for Hlabisa Municipality's tourism, by identifying GAPs in the relevant tourism components. Potential actions are identified, which will be carried through to the strategic component of the tourism strategy development process.

Tourism Component	Desired Outcome	Current Status Quo	GAP	POTENTIAL ACTIONS
Tourist Channel	R66 Zulu Heritage Route linking into Hlabisa Municipal Zulu heritage offerings.	Spatially, options into Hlabisa Municipality are through the Game Reserve at Cengeni Gate or at Nongoma, onto R618 back south. Both options are inconvenient from the R66.	Convenient and accessible link into Hlabisa Local Municipality from the R66	Upgrading of P700 road (from Ulundi into Imfolozi Game Reserve) Creation of linkages between Game Reserve and Cultural Tourism, for Game Reserve to be entrance linkage
Tourist Reception	Warm reception of tourists by locals.	Locals do not interact with tourists much; there are no tourist facilities in the Municipality.	No training or community awareness has been received on tourism hospitality.	Community awareness training on tourist hospitality.
Tourism Products	Accommodation facilities for tourists arriving on business (e.g. To the Municipality)	Most accommodation in primary area caters for holiday tourists, arriving for game. There is a small market for business, and overnight/ stop over tourists, particularly with regards to Municipal related business. At present such visitors go to Hluhluwe or Mtubatuba for B&Bs or guesthouses (none identified in Game Reserve). Therefore there is a	No B&Bs or guesthouses available in the Municipality.	B&B facilities to be incorporated into existing planned accommodation.

Tourism Component	Desired Outcome	Current Status Quo	GAP	POTENTIAL ACTIONS
		(small but) noticeable amount of tourist leakage from the Municipality.		
	Hlabisa Local Municipality - the cultural and Zulu folklore hub of the Elephant Coast	Rich cultural heritage, mainly oral, well known by some older community leaders.	History is largely undocumented and or not easily accessible.	Documentation of oral history, Training of story tellers and guides.
	The availability of accessible, affordable adventure tourism products in the Municipality- e.g. horse riding trails	Adventure tourism identified as being in high demand by visitors to the primary area in research. Also, "young and upcoming" are a growing national market, but tourism in Elephant Coast is not targeted at them.	No adventure tourism in the Municipality, no products for the "young and upcoming" market.	Exploration and development of adventure tourism products- e.g. Horse trails through rural Hlabisa, 4X4 riding. Products to retain 'green' tourism or eco tourism character of the surrounding areas.
	Hlabisa Local Municipality - as the cultural hub of the Elephant Coast	Authentic Zulu offerings exist. Izingoma held annually.	Geared for local communities, and not necessarily accommodating for international or local tourists	Tour guides to take tourists to Izingoma, with explanations throughout the tour.

Tourism Component	Desired Outcome	Current Status Quo	GAP	POTENTIAL ACTIONS
Support Services	Hlabisa to be a convenient, accessible and preferred service node for tourists in Hlabisa and the Game Reserve.	Mtubatuba and Hluhluwe are preferred over Hlabisa as service nodes for visitors to the Game Reserve, even though Hlabisa is closer. Hlabisa is however a primary investment node along with Mtubatuba and Hluhluwe according to Umkhanyakude SDF.	Hlabisa is catered for surrounding rural and peri urban communities, therefore services are limited and quality of services is less than those in Hluhluwe or Mtubatuba.	As tourism increases, approach tourist facility franchises (forex facilities, internet cafes, banks for mobile ATMs) Compile list of services available (pharmacy, hospital, ATMs, petrol filing stations) and place them in future accommodation facilities in Hlabisa, and also in Game Reserve
Marketing	Central online information source on all Hlabisa Municipality tourism products.	Although no identified/official tourism in Hlabisa Municipality, there is no centralised online database of tourism products within primary area. Elephant Coast website not updated and requires more product information.	Lack of finances for the effective running of Elephant Coast TA. Therefore the Association battles to fulfil its central marketing mandate.	Research on alternative methods of funding for Elephant Coast.
Enabling Environment	Availability of skilled tour guides for mainly tours throughout Municipality.	Only one tour guide identified in Municipality.	No official skills training on tour guiding in Municipality.	Address the need to incorporate tour guide training with cultural focus at Business Support Centre.
	Availability of sufficient and sufficiently skilled tourism staff at Municipality.	Tourism staff at Municipality currently stretched.	Lack in human resource support of existing Municipal tourism staff, resources such as email and internet not reliable,	Address capacitation of tourism staff at Municipality in strategic component of Strategy development, and pull though to

Tourism Component	Desired Outcome	Current Status Quo	GAP	POTENTIAL ACTIONS
			administrative capacity of tourism staff insufficient.	project list.
Tourist Preferences	Hlabisa Tourism attractive for international NSSAs and Wonderlusters	Soft tourist channels supply currently dominated by tightly managed, fixed and inflexible products.	Observation of need for independent, flexible travel in nationally targeted growing market segments NSSAs and Wonderlusters.	Contribute to the development of advertising/ brochures aimed directly at these markets, at central, online based advertising source.
Trends Based On Economic Conditions	Specific data and information available to inform strategic tourism decisions readily and freely available	Trends of tourism within area surrounding Hlabisa Local Municipality not known.	Elephant Coast specific data (which would inform Hlabisa) as well as Elephant Coast market trends and preferences not available.	Contribute to the development of central Elephant Coast specific tourism data source. Continually update and store data on tourism businesses in Municipality.

2.7.   CONCLUSION- CONTEXTUAL ANALYSIS

Hlabisa tourism is a future sector which has much potential within the Elephant Coast. From the assessments of Hlabisa's potential tourism industry, it has been established that the Municipality can play an important role in linking eco tourism in Elephant Coast with cultural tourism in Zululand. Main weaknesses identified for this opportunity however include road networks and inaccessibility of cultural information. National and international market segments targeted nationally and provincially- namely the 'Young and Upcoming Market', as well as NSSAs and Wonderlusters also present Hlabisa tourism with opportunities for market growth, "Homely Well off Couples", "Golden Active Couples", and "Young Independent Families" are trusted Elephant Coast markets that should not be overlooked when attracting tourists to the Municipality.

Community based, 'green' or ecotourism are an important principle in the development of tourism products in the Municipality.

3. STRATEGIC PLAN

In developing a vision and mission for Hlabisa Local Municipality tourism, it is important to ensure that the direction of tourism in the Local Municipality is aligned to the national direction of tourism. In addition, the vision and mission for Hlabisa Municipality should respond to the current tourism related issues identified in the Municipality, such that it is relevant and effective in developing tourism in its specific context.

The vision and mission developed will therefore be the assimilation of a response to the local tourism issues identified, as well as a response to the leading of the current national tourism strategy.

3.1. VISION

The vision of the national tourism strategy is "**To be a top 20 tourism destination in the world by 2020"**

In aligning to and supporting the national vision- while leveraging off Hlabisa Municipality's internal local culture and nature competitive advantages, the following is developed as the vision for Hlabisa Municipality tourism. The vision of Hlabisa Local Municipality tourism is also developed such that it strategic reflects the tourism potential of the Municipality's geographic positioning between a belt of nature and eco tourism activity in the east and the corridor of cultural tourism in the west. The vision guiding Hlabisa's tourism sector for five years and rolling is:

> **"TO BE A LEADING CULTURAL AND NATURAL TOURISM DESTINATION IN KZN BY 2020"**

3.2. MISSION

The following mission for Hlabisa tourism was developed by addressing the national tourism strategic themes and strategic clusters and thrusts, as well as the gaps and opportunities of tourism in Hlabisa. The resulting mission is below:

> **"Together, we will develop Hlabisa Local Municipality as the creative and cultural**
>
> **historical eco- tourism node of the Elephant Coast,**
>
> **building sustainable and responsible tourism and being leaders in job creation,**
>
> **skills development**
>
> **and broad tourism participation of our rural communities,**
>
> **so that local and international markets will be drawn to enjoy the quality of our**

excellently managed,

well resourced tourism sector"

3.3. SHAPING OUR STEPS: GOALS

Developing goals for the tourism sector break down the achievement of the total vision into achievable steps. As such, the vision for the sector represents a desired picture for the entire Hlabisa tourism system, while the goals will represent a desired picture for each component of the system. By developing each component, development of the entire system will be systematically achieved. Below, goals based on the development of each component of Hlabisa's tourism system are listed:

GOAL 1: **TOURISM INSTITUTIONAL DEVELOPMENT**

The tourism sector in Hlabisa is currently handled as a component of small business support. As the sector develops, more solely tourism focussed capacity will be required. There is also a need for administrative and management skills training and development of tourism officials handling the Municipality's tourism system. In addition, in anticipating the growth of the tourism system of Hlabisa Municipality, legal and administrative formal arrangements such as by laws and systems for tourism business registration must be developed. Lastly, there is dire need for funding of Elephant Coast Tourism Association, particularly where Hlabisa Municipality's tourism will be concerned (e.g. - the Zamimpilo Elephant Coast satellite office).

(Main system component: Enabling environment/ the entire system)

GOAL 2: **TOURISM PRODUCT DEVELOPMENT**

During the situational analysis it was established that Hlabisa Municipality is rich in cultural history, and that the Municipality also has a competitive advantage in eco-tourism because of the Game Reserve and surrounding eco tourism products. It was noted that adventure tourism is in demand in the primary area, and it was also noted that Hlabisa Municipality has a competitive advantage in the development of new tourism products such as Zulu folklore and storytelling. It was also noted that tourism products in the Municipality must be economically and culturally accessible so as to tap into emerging national markets like the vast "young and upcoming" black market.

(Main system component: Tourism attractions)

GOAL 3: **TOURISM COMMUNITY ENABLEMENT AND EMPOWERMENT**

During the situational analysis it was established that the majority of Hlabisa Municipality's communities do not have formal skills in tourism, and that there is limited Hlabisa community participation in the tourism industry- beyond catering. If the Hlabisa tourism system is to grow, it will be necessary that the broader community is ready to warmly receive tourists through community tourism awareness, training on running of tourism establishments, and training of tourism linked industries on how service and hospitality levels. It is also a 2010 National Tourism strategic objective to ensure that the tourism industry transforms such that there is meaningful awareness and participation of black South Africans. This goal addresses this element of the vision.

(Main system component: Tourism reception)

GOAL 4: **TOURISM HUMAN AND PHYSICAL INFRASTUCTURE DEVELOPMENT**

The majority of access roads into the tourism system of Hlabisa Municipality are indirect- particularly because of the new demarcation. In addition, it has been noted that there are no tour operators based in the Municipality, and limited transport for tourists from other nodes to Hlabisa. Lastly, it will become necessary for Hlabisa Municipality products to be featured on the Elephant Coast website, such that especially international tourists are able to gain access to the Municipality electronically.

(Main system component: Tourist channel)

GOAL 5: **TOURISM MARKET AND MARKET DEVELOPMENT**

Attractive marketing for tourists is necessary given that active demand for Hlabisa Municipality tourism does not exist. A large established domestic market already exists in the primary area. TKZN is strategically aiming to attract NSSAs and Wonderlusters in the international markets, while in the local sphere; the most promising market to tap into is the "young and upcoming" market. The latter market is also particularly attractive because it is a large (5.1 million nationally) and previously untapped market, and because drawing in this market will be well aligned to the 2010 National Tourism strategic thrust of "entrenching a culture of travel amongst South Africans". A marketing project has already been approved and budgeted for in the 2010/11 Hlabisa Local Municipality IDP.

(Main system component: Tourist and Marketing)

GOAL 6: **TOURIST SUPPORT DEVELOPMENT**

This part of Hlabisa's tourism system must not be overlooked. It was established during the contextual analysis that the node of Hlabisa is not sufficient in services and development as a tourism node. This strategic thrust aims to encourage development in Hlabisa Town such that tourist expenditure leakage elsewhere is reduced. Also, if more tourists are to frequent the Municipality, it will become necessary to ensure that safety and security levels are tightened and that malaria is stringently controlled. This goal therefore involves other Hlabisa Municipality non tourism role players such as the Hlabisa Municipality Department of Health and SAPS.

(Main system component: Support services)
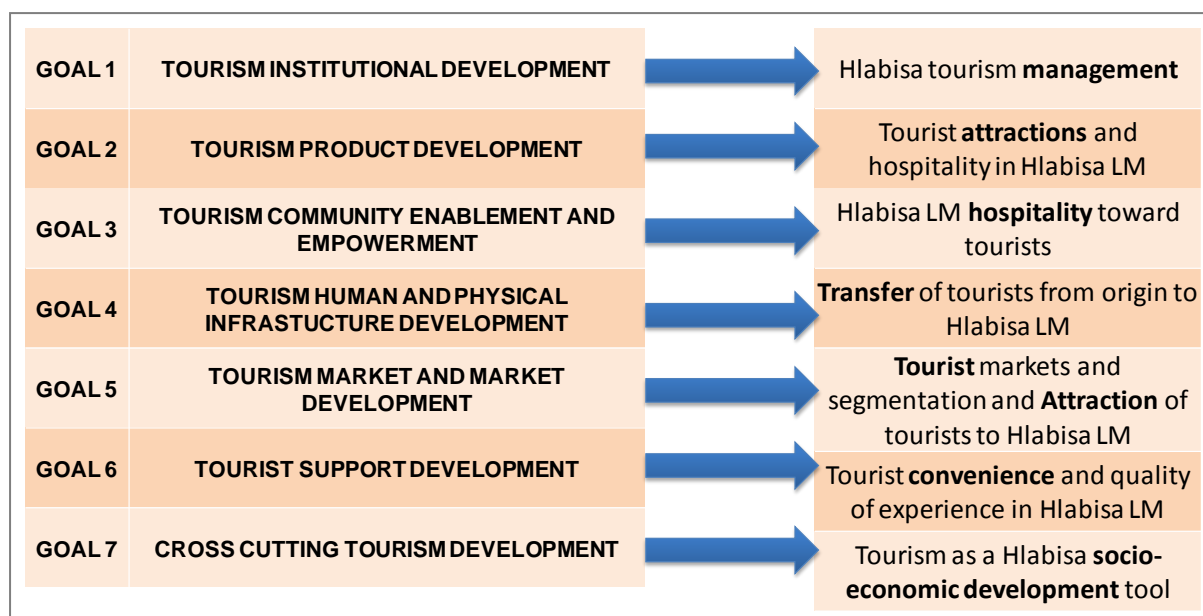
GOAL 7: **CROSS CUTTING TOURISM DEVELOPMENT**

The final goal is cross cutting in that where possible, green / environmentally friendly job creation must be achieved and awareness on environmental sensitivity and climate change must be developed. This is most important amongst entrepreneurs of planned tourism products, such that they are able to introduce environmentally friendly tourism products. Also tourism entrepreneurs and aspiring tourism entrepreneurs must be systematically trained such that their tourism businesses are culturally, economically and socially responsible. Lastly, this goals recognises that it is important to minimise leakage of business production out of the economy where unnecessary, such that linkages in various productions of the economy are achieved (e.g. caterers with agri- growers)

(Cross cutting principles)

The goals as captured above are designed to address all aspects of the tourism system, as below:

Figure 5-Hlabisa Municipality Tourism Strategy Goals address the entire tourism system

GOAL 1	TOURISM INSTITUTIONAL DEVELOPMENT	➡️ Hlabisa tourism **management**
GOAL 2	TOURISM PRODUCT DEVELOPMENT	➡️ Tourist **attractions** and hospitality in Hlabisa LM
GOAL 3	TOURISM COMMUNITY ENABLEMENT AND EMPOWERMENT	➡️ Hlabisa LM **hospitality** toward tourists
GOAL 4	TOURISM HUMAN AND PHYSICAL INFRASTUCTURE DEVELOPMENT	➡️ **Transfer** of tourists from origin to Hlabisa LM
GOAL 5	TOURISM MARKET AND MARKET DEVELOPMENT	➡️ **Tourist** markets and segmentation and **Attraction** of tourists to Hlabisa LM
GOAL 6	TOURIST SUPPORT DEVELOPMENT	➡️ Tourist **convenience** and quality of experience in Hlabisa LM
GOAL 7	CROSS CUTTING TOURISM DEVELOPMENT	➡️ Tourism as a Hlabisa **socio-economic development** tool

3.4. SHAPING OUR ACTIONS: STRATEGIES

Strategies for the above mentioned goals are listed below. A table for corresponding actions is thereafter included.

1. GOAL 1: TOURISM INSTITUTIONAL DEVELOPMENT

STRATEGY: To achieve excellent management of Hlabisa Municipality's tourism system, and to ensure sufficient resources for effective tourism leadership.

The Institutional Development goal has five strategic thrusts. These include:

— Achieving coordination in institutional tourism structure development:
This focuses on the establishment and clarifying of roles within the existing structure (Hlabisa tourism forum) for tourism development and operation and the strengthening of this structure.

— The development of a (solely) tourism unit within the Municipality:
This focuses on the structure within which tourism will be handled. It addresses the approach to tourism in Hlabisa, and the effect of this on the quantity of staff made available.

— The development of human resources:
This is mainly within the tourism unit of the Municipality. It is intertwined with the above strategic thrust, and addresses the systematic capacitation of the staff of the unit, such that they are able to administrate the tourism system in the relevant areas. Also for Hlabisa LM,

training on heritage resources within the Municipality is necessary. This is also necessary for community leaders such as councillors as well. Where necessary- this includes the quantitative development of the tourism unit such that enough staff is available in the Hlabisa tourism unit.

— The development of legal and other administrative systems:
These currently do not exist in the Municipality. This is also intertwined with cross cutting measures, where responsible tourism is worked into administrative by laws.

— Finally, The resource capacitation of the tourism unit itself:
This includes financial and other resources capacitation.

2. *GOAL 2: TOURISM PRODUCT DEVELOPMENT*

STRATEGY: To develop new forms of accessible, creative and demand driven cultural history and eco tourism in Hlabisa Local Municipality.

The Product Development goal has four strategic thrusts:

— The development of eco-tourism products:
These are in keeping with the theme of the surrounding available facilities and products. This largely leverages off the Hluhluwe- Imfolozi Game Reserve, and the currently planned Community Game Reserve in the Municipality. This also enables the Municipality to tap to the existing markets coming into the primary area.

— The development of cultural/ heritage products:
This entails the exploration and formal establishment of existing heritage resources in the Municipality. Because heritage and history is primarily oral in the Municipality, it first requires research and documentation. This strategic thrust will be developed hand in hand with that of capacitation of Municipal staff and leaders- where community members will approach the Municipality, or community leaders where heritage resources are discovered. This strategic thrust is a key focus area in developing Hlabisa as the cultural historical node within the Elephant Coast. Also important within the development of heritage products is the development of storytelling products within Hlabisa- as story telling such as Zulu folklore is a relatively untouched tourism opportunity within KwaZulu-Natal. Lastly, the incorporation of heritage assets within the Game Reserve into a Municipal heritage asset database should be addressed, such that this forms a holistic picture of heritage products on offer in the Municipal area.

— The development of adventure tourism products:
This is important as a focus area of product development because of the identified demand for adventure tourism, both in the surveys conducted in the area, as well as the markets identified as currently coming to the area (e.g. international "wonderlusters"). It is also important for the attracting of the "Young and Upcoming" market, although such products will have to be developed such that they are financially accessible. Adventure tourism, and

accessible adventure tourism is also important in aligning with the Provincial Zulu Kingdom marketing campaign; where the Zulu- Kingdom is marketed as being an experience "beyond expectations, within your reach".

— The development of niche tourism products:

This is important, in keeping with the national focus of the development of niche tourism products. Possibilities include the development of medical tourism linkages, 4x4 trails, equestrian trails, and avi tourism linkages and routes.

3. *GOAL 3: TOURISM COMMUNITY ENABLEMENT AND EMPOWERMENT*

STRATEGY: To develop the communities and stakeholders of Hlabisa such that they are able to provide world class tourism, and such that broad based participation in the tourism industry is achieved.

The Community Enablement and Empowerment goal has three strategic thrusts:

— Broad based tourism awareness:

This relates to the need for awareness within the community on tourism, particularly in three areas. It is important that this is also pulled through to schools within the Municipality, meaning local educators are of particular importance to this Strategy.

   o General awareness on tourism:

   This addresses general community understanding of the tourism sector, its importance, and the role it can play in the socio-economic development of the Municipality's communities at large.

   o General reception of tourists:

   This incorporates friendliness toward tourists, such that they are made to feel at home by the community. It also includes service levels at key points such as filling stations, restaurants, chemists, and other places where tourists may visit. Safety is also an important factor not to be forgotten in the reception of tourists. This will require participation by the South African Police Services (SAPS) representatives in the Municipality.

   o Environmental awareness:

   This addresses awareness of the local community about the natural environment, and is important because this it is one of the competitive advantages at the forefront of Hlabisa's tourism potential. It is addresses education about the environment and its value, and addresses negative environmental problems such as poaching, litter, and "environmental" graffiti (e.g., carving into trees), and guidance on the use of wood during crafting. At present this occurs on a small scale, and therefore has limited impact. Because of the integration of the Hluhluwe-Imfolozi Game Reserve into the Municipal demarcation area, this strategic thrust will require liaison with the Game Reserve management, since they have undertaken to provide (EKZNW aligned) environmental interpretive, education and awareness programmes (within the Reserve).

- o Heritage resources awareness:

  Often, communities are not aware what comprises a heritage resource, and what should be done with such resources once they are identified. Physical resources such as graves are often vandalised with graffiti or stolen. According to Amafa KZN, specific procedures must be followed in communities, where resources are identified. It is required that Amafa is alerted once resources are identified. This includes oral history traditions. In order for this to occur, the broader community requires skills training and awareness on the value of heritage resources, and what is required of community members once these are identified. This strategic thrust will be developed hand in hand with that of capacitation of Municipal stakeholders- where awareness capacitation programmes will take place in order that community leaders would assist in liaising between community members and Amafa KZN. Lastly, it must be noted that this will require liaison with the Hluhluwe-Imfolozi Game Reserve management, as it is a management objective of the Game Reserve to "…create a sense of identity within the neighbouring community with the cultural and historical importance of the Park."[4] The Game Reserve has numerous heritage resources, which should be addressed for tourism of the whole Municipality such that they form the heritage identity of Hlabisa Municipality communities at large.

— Broad based skills development:

This relates to business skills development programmes, much like those offered on demand by the Business Support Centre, but solely tourism focussed. These include, for example, the provision of tour guide/ operator courses, and will relate directly to the type of products being developed.

Importantly, it is under the skill development thrust of the Community Enablement and Empowerment Strategy that programmes are offered, through the Business Support Centre for the establishment of new tourism ventures. Tourism awareness programmes will encourage participation in such courses, for potential entrepreneurs who are interested.

— Tourism awareness and capacitation for key community leaders:

This strategic thrust focuses specifically on key community leaders- who do not necessarily form part of the direct institutional structure of tourism in Hlabisa Municipality, but are 'gatekeepers' of tourism development in the Municipal area nonetheless. This includes both councillors and Amakhosi. It is here noted that issues regarding Ingonyama land, and unsuccessful liaison and communication between investors and traditional leaders has led to a hindrance in development in KZN. In order to pre-empt and minimise this occurrence in Hlabisa, tourism development awareness for Amakhosi should be addressed. This will not only assist in creating awareness and appreciation for tourism development in the Municipality amongst Amakhosi, but will also assist in developing and strengthening communication channels which will be necessary should investors seek to develop tourism infrastructure. In addition to Amakhosi- it is necessary for councillors to receive training on not only the appreciation of tourism development, but on their specific role, and procedures

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[4] This refers to a specific management objective of the Hluhluwe-Imfolozi Park, extracted from the draft HIP Integrated Management Plan of 2011.

necessary in the attraction and development of tourism products and infrastructure within their respective wards.

4. GOAL 4: TOURISM HUMAN AND PHYSICAL INFRASTUCTURE DEVELOPMENT

STRATEGY: To develop human resource and infrastructural channels into the Municipality such that easy access into the Hlabisa tourism system is achieved.

The Infrastructure Development goal has three strategic thrusts:
— Access Road Development :
This addresses the roads identified during the contextual analysis as requiring attention for access into the Municipality, and requires active participation by the District as well as the Department of Transport.

— Transport System Development:
This primarily addresses the access into the Municipality. As attractions in the Municipality grow, systems of public tourist transport would need to be developed. In addition, this links with the previous goal strategic thrust- the development of tourism skills- where tour operator companies based in the Municipality would need to be developed.

— Online Accessibility Development:
Although a small aspect of the tourism system, this is important, given the focus of the local tourism on international and largely internet dependent markets. This strategic thrust ensures that the Hlabisa tourism industry is fully accessible (for tourist planning and booking) on the internet. This will be done through the Elephant Coast Tourism Association website. It also facilitates access to tourism products by encouraging and facilitating the development of individual websites per product.

5. GOAL 5: TOURISM MARKET AND MARKETING DEVELOPMENT

STRATEGY: To draw in established surrounding markets to Hlabisa Municipality, and encourage demand in emerging local and international, and niche markets.

The Product and Market Development goal has five strategic thrusts:
— General Marketing:
While this speaks of general marketing, this entails creative forms of marketing such as regular release of DVDs at accommodation establishments throughout the area which provide visitors with updates on tourism products available in the Municipality (e.g. through Elephant Coast Tourism Association). The existing advertising planned for crafters within the Hlabisa Municipality Integrated Development Plan (IDP) falls within this general strategic thrust (development of brochures and business cards for crafters).

— Marketing to established local markets:
This entails advertising campaigns to the local markets identified in the primary area- including the "well off homely couples", "golden actives" and "independent young families".

This includes advertisements in specific magazines (e.g. Sarie Magazine, Fair Lady Magazine).

— Marketing to established international markets:
This entails advertising targeted specifically at international markets identified in the area "NSSAs" and "wonderlusters". Due to their international location, this entails strong links with national and provincial marketing, and strong alignment with marketing systems identified for these markets by South Africa Tourism.

— Marketing to emerging local markets:
This focus is specifically for encouraging participation of South African markets which have previously not travelled. This specifically includes the "young and upcoming" market. In general, the Marketing Strategy is highly dependent on funding. In particular, this strategic thrust results in visual advertising, such as television adverts (during strategic programmes such as "Laduma"), as well as radio advertising. Included in upcoming markets is the local schools market, although this may not be highly profitable market. At present this market may not be a high priority market, as subsidised trips would be required.

— Marketing to niche markets:
This is dependent on each niche product identified, and entails advertising within specific niche market publications such as SA 4x4 Magazine, and creating links with existing role players (e.g. the medical establishments) such that they are able to advertise to clients.

6. GOAL 6: TOURIST SUPPORT DEVELOPMENT

STRATEGY: To achieve a world class, convenient and safe tourism experience for all Hlabisa Municipality's tourists.

The Tourist Support goal has four strategic thrusts:
— General development within Hlabisa Town:
The tourism development of Hlabisa Town is not in isolation from the Hlabisa Municipality Investment Portfolio prepared for the Municipality. In addition, the upcoming COGTA Small Towns Beatification Project will provide funding for general beatification and development of Hlabisa Town. The Strategy to achieve a world class and convenient experience for Hlabisa Town will be aided by this beatification of Hlabisa Town. In particular, paving, parking in necessary areas and signage form part of the general development of Hlabisa Town.

— Development of tourist facilities:
This specifically addresses facilities available for tourists. In most cases, these will be long term, currently low priority projects, as Hlabisa Town does not currently have tourists to justify current implementation of these projects. This includes the availability of necessary tourist financial services, telephone facilities for world calls, internet cafes providing internet communication facilities, credit card facilities, chemists and pharmacies, and on call doctors.

— Development efficient tourist safety and security systems:

This strategic focus will require liaison with the Hlabisa Local Municipality South African Police Service (SAPS). Strategic focus addresses key areas flagged by the SAPS for safety patrol, and general safety input and advice on new tourism products will be necessary. This links with the existing tourism sub forum on the Local Economic Development (LED) forum in the Municipality, as the SAPS form part of these stakeholders.

— Development of efficient health tourism systems:
This addresses any health issues which may be hazardous to tourists, such as malaria. This requires the development of necessary systems, primarily by the Hlabisa Local Municipality Department of Health.

7. *GOAL 7: CROSS CUTTING TOURISM DEVELOPMENT*

STRATEGY: To achieve job creation of green jobs, encourage community tourism where possible, encourage linkages between various productive role players within the Municipal economy, and ensure that the tourism in Hlabisa is environmentally, culturally, economically and socially responsible.

The Cross Cutting goal has five strategic thrusts:
— Green tourism job development:
This strategic thrust aims to cut across all aspects of the tourism system, finding opportunities for the development of green tourism which will result in job creation within these products.

— Green tourism infrastructure development:
This addresses the development and installation of infrastructure in tourism facilities which are environmentally friendly. This may tap into funding available for green infrastructure development as mentioned in the Nation Budget Speech.

— Community tourism development:
This cross cutting measure aims to encourage planned tourism facilities to engage with communities as much as possible. It also aims to encourage the development of new community based tourism products.

— Responsible/ fair tourism development and accreditation:
This strategic thrust aims that tourism products within the local Municipality be accredited by recognised fair tourism/ responsible tourism accreditation bodies, such that this characterises the broader Hlabisa Municipality as a tourism destination, and is pulled through to the marketing of the Municipality's tourism. It is aimed that, apart from achieving responsible and fair tourism levels, this will attract tourists which are particularly conscientious about responsible tourism practices.

It is ultimately aimed that responsible tourism would define and distinguish Hlabisa Local Municipality tourism, as is captured in the mission statement ("...develop Hlabisa Local

Municipality as the... eco- tourism node of the Elephant Coast... " see page 21). Therefore this strategic thrust is particularly important in the broader Strategy.

— Linkage Development:
This addresses the creation of linkages between current role players in the economy. It is aimed that through linkage development, less expenditure leakage will occur, and that role players who have had limited access to economic opportunities will be exposed to more economic opportunity. Examples include crafters who have previously not had tourist exposure- being offered display space at planned tourism facilities, and caterers being linked with existing agricultural growers in the economy.

— Monitoring and evaluation of the impact of tourism :
This is a key programme/ strategic thrust in the development of Hlabisa tourism, and continually assesses tourism development to ensure that its impact is positive and developmental in nature.

This cross cutting strategic thrust has the following implications:

o Each project will be ranked and prioritised according to its developmental impact on the surrounding community. In other words, each project will be ranked according to its impact on job creation and community development, and heritage and cultural and natural resources. From here, priority projects will be selected.

o Each project will have a built in recommended system for basic monitoring and evaluation of its impact on job creation, community development, and impact on natural resources, and cultural resources.

o In addition to the overall monitoring and evaluation of the goals identified for the entire Strategy, specifically, recommendations for regular evaluation and management of the impact of the Strategy on job creation, community development, heritage and natural resources will form part of the final Strategy.

3.5.   STRATEGIC ACTIONS: PROJECT LIST

The table below provides a summary of the strategy formulation of the Hlabisa Local Municipality Strategy. It encapsulates the goals, strategies identified, and the corresponding actions or potential   projects.

STRATEGIC THRUST/ GOAL	STRATEGY	ACTIONS/ POTENTIAL PROJECTS	
GOAL 1: **HLABISA TOURISM MANAGEMENT**	**To achieve excellent management of Hlabisa Municipality's tourism system, and to ensure sufficient resources for effective tourism leadership.**	**1.1**	Training for Municipal tourism staff (capacity building)
		1.2	The development of a tourism unit institutional development guide- addressing qualitative and quantitative staff requirements
		1.3	Addressing tourism as an element of Local Economic Development
		1.4	The development of systems and criteria for the registration of aspiring tourism business
		1.5	The development of tourism by laws
GOAL 2: **HLABISA TOURISM PRODUCTS**	**To develop new forms of accessible, creative and demand driven cultural history and eco tourism in Hlabisa Local Municipality.**	**2.1**	The development of accommodation at Mpembeni Community Conservation Game Reserve, potentially including environmental education centre. (priority)
		2.2	The development of a three star hotel in Hlabisa Town. (priority)
		2.3	The development of cultural festival at precinct near the Memorial Gate for Annual Ingoma and other cultural events. (priority)
		2.4	The development of tourism products at the Mission Church uMalusi Omuhle. (priority)
		2.5	Development of Mega tourism attraction for Hlabisa Town.(priority)

STRATEGIC THRUST/ GOAL	STRATEGY	ACTIONS/ POTENTIAL PROJECTS	
		2.6	Packaging of the main tourism activities in the Municipality (priority-route)
		2.7	The development of equestrian trails through the Municipality(non priority)
		2.8	The development of 4x4 trails through the Municipality(non priority)
		2.9	The development of oral tourism products in the Municipality(non priority)
		2.10	Liaison with Hluhluwe-Imfolozi Game Reserve and Amafa about integration of Hlabisa Municipality and Game Reserve cultural/ historical heritage resources for tourism. (non priority)
		2.11	Development of camps off Game Reserve, in community, instead of increase in camps in Game Reserve (non priority)
		2.12	Research and documentation of cultural history of Hlabisa LM (non priority)
		2.13	Development of potential medical tourism to Hluhluwe-Imfolozi Game Reserve for medical recuperation (non priority)

STRATEGIC THRUST/ GOAL	STRATEGY	ACTIONS/ POTENTIAL PROJECTS	
GOAL 3: **HLABISA COMMUNITY SKILLS DEVELOPMENT AND TOURISM AWARENESS**	**To develop the communities and stakeholders of Hlabisa such that they are able to provide world class tourism, and such that broad based participation in the tourism industry is achieved.**	**3.1**	Conducting of a community tourism awareness programme.
		3.2	Periodic training on value and development of tourism for councillors
		3.3	Training on value and development of tourism for Amakhosi- specifically focusing on mindsets toward land, and the development of tourism within Ingonyama land
		3.4	Training for the Hlabisa Taxi industry on the value of tourism, and potential tourism opportunities such as tour operating and local transport
		3.5	Community training on the value, identification, conservation of heritage resources
		3.6	Incorporating craft businesses into BSC training, and ensuring quality control of crafts
		3.7	Regular community training on tourism venture development
		3.8	The development of an environmental interpretation centre in the Municipality which is connected to the proposed Hluhluwe-Imfolozi Game Reserve environmental interpretation centre.

STRATEGIC THRUST/ GOAL	STRATEGY	ACTIONS/ POTENTIAL PROJECTS	
GOAL 4: HLABISA TOURISM ACCESS AND INFRASTRUCTURE	**To develop human resource and infrastructural channels into the Municipality such that easy access into the Hlabisa tourism system is achieved.**	4.1	The development of the P234 road connecting Mkuze Airport to the R66
		4.2	The linking of the R66 route to Hlabisa Local Municipality
		4.3	Convenient and accessible link into Hlabisa Local Municipality from the R66: Upgrading of P700 road (from Ulundi into Imfolozi Game Reserve) Creation of linkages between Game Reserve and Cultural Tourism, for Game Reserve to be entrance linkage
		4.4	Facilitation of creation of tourist transfer business (taxis)
		4.5	Erecting of signage along N2, R618, and R66
		4.6	Regular monitoring and evaluation and report back on functioning tourism related infrastructure, to relevant service providers (e.g. future Mandlakazi Water Project, roads, future Hlabisa substation development)
GOAL 5:	**To draw in established markets to Hlabisa Municipality, and encourage demand in emerging local and**	5.1	Develop strategy to attract "young and upcoming" black tourism market segment to Hlabisa LM (e.g. advertising with the Shot Left TV programme)

| STRATEGIC THRUST/ GOAL	STRATEGY	ACTIONS/ POTENTIAL PROJECTS	
HLABISA TOURISM MARKET AND MARKETING DEVELOPMENT	**international markets.**	**5.2**	Marketing of products directly to 'well off homely couples", "golden actives" and "young independent families"
		5.3	Regularly ensuring Hlabisa Local Municipal projects are featured on Elephant Coast website
		5.4	Address possibility of registering Hlabisa LM products on national Tourism Export Council
		5.5	The quarterly development of tourism brochures for key products
		5.6	The advertising of Hlabisa LM projects within niche market publications (e.g. 4x4 Magazine).
		5.7	Development of DVD for advertising of Hlabisa LM tourism products- for accommodation establishments in Elephant Coast. Address this with Elephant Coast as a possible District project .
GOAL 6: **HLABISA TOURISM SUPPORT SERVICES**	**To achieve a world class, convenient and safe tourism experience for all Hlabisa Municipality's tourists.**	**6.1**	Engage SAPS in tourism awareness and tourist protection in Hlabisa LM
		6.2	Discussions with Department of Health regarding malaria control systems in Hlabisa LM

STRATEGIC THRUST/ GOAL	STRATEGY	ACTIONS/ POTENTIAL PROJECTS	
		6.3	Development and beatification of Hlabisa node (including engaging of franchise services to trade in Hlabisa)
		6.4	Development of a visitor information centre in Hlabisa Town
GOAL 7: HLABISA RESPONSIBLE TOURISM DEVELOPMENT	**To achieve job creation of green jobs, encourage community tourism where possible, encourage linkages between various productive role players within the Municipal economy, and ensure that the tourism in Hlabisa is environmentally, culturally, economically and socially responsible.**	7.1	Facilitate linkages between tourism accommodation owners and taxi owners (for transfers where requested)
		7.2	Tourism promotion, engage potential and current investors to partner with communities in tourism development
		7.3	Facilitate links between agricultural growers and caterers
		7.4	Facilitate links between crafters and planned tourism products.
		7.5	Development of tourism route within Hlabisa. (see 2.6)
		7.6	Development of training and awareness programmes on green tourism and climate change for entrepreneurs as prerequisite to development
		7.7	Development of links with responsible tourism accreditation service providers

4. SPATIAL TOURISM DEVELOPMENT PLAN

The following section provides a conceptual plan for the spatial distribution of tourism investment.

The framework is aligned to the Hlabisa Local Municipality 2010/ 2011 Investment Portfolio, which indicates, as illustrated below, that the Hlabisa Municipal area displays eco and cultural tourism potential. It highlights Hlabisa as the key node along the primary economic and tourism corridor of the R618.

Figure 6-Hlabisa Local Municipality Investment Profile
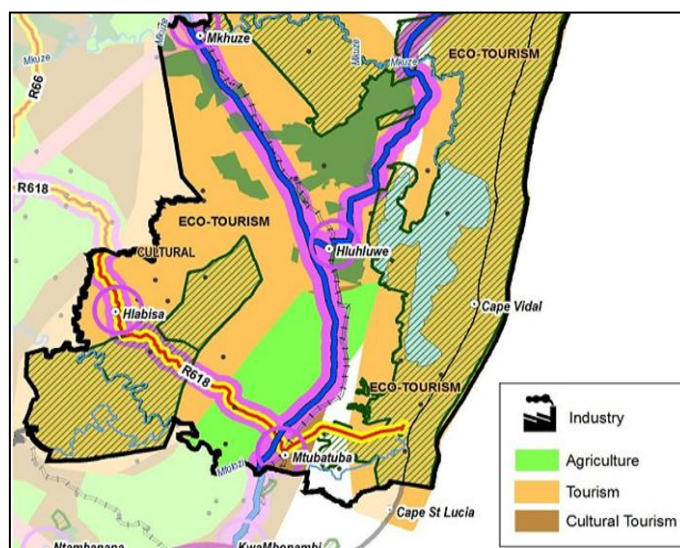
SOURCE: 2010/ 2011 HLABISA LOCAL MUNICIPALITY INVESTMENT PROFILE ISSUE1, VOL1

The diagram below provides an illustration of the spatial tourism development plan. At present, this indicates the areas of planned and potential private and public sector investment. It places emphasis on nodes and areas where priority projects are identified.

The figure illustrates below that the primary corridor is met at the entrance of the Municipality by nodes of public and private sector investment.

In particular, Hlabisa Town is highlighted as being an area of primary public sector investment concentration. This reflects the development of Hlabisa Town as a node for development of tourism services and infrastructure. This will incorporate public sector and private sector investment concentration, including signage, a visitor's information centre, sufficient parking and paving, and general beatification as per the current Small Towns Beatification Initiative.

Other investment nodes indicate areas for public and private sector investment. They are located along the primary corridors as indicated. Amongst them, are the priority projects, including

✓ The development of tourism products for the Mpembeni Community Game Reserve
✓ The development of a three star hotel in Hlabisa Town
✓ The development of Cultural Festival and Cultural Activity Precinct
✓ The development of tourism products at the Mission Church uMalusi Omuhle.
✓ Development of a Hlabisa Town Mega Activity Hub

The following figure provides a spatial plan perspective of tourism in Hlabisa Local Municipality, reflecting primary, secondary and tertiary tourism corridors and nodes. These nodes and corridors are listed below as indicated in the figure:

Tourism Corridors:
C1: Secondary Corridor- R618
C2: Primary Corridor- P451
C3: Secondary Corridor- D1905
C4: secondary corridor- P453
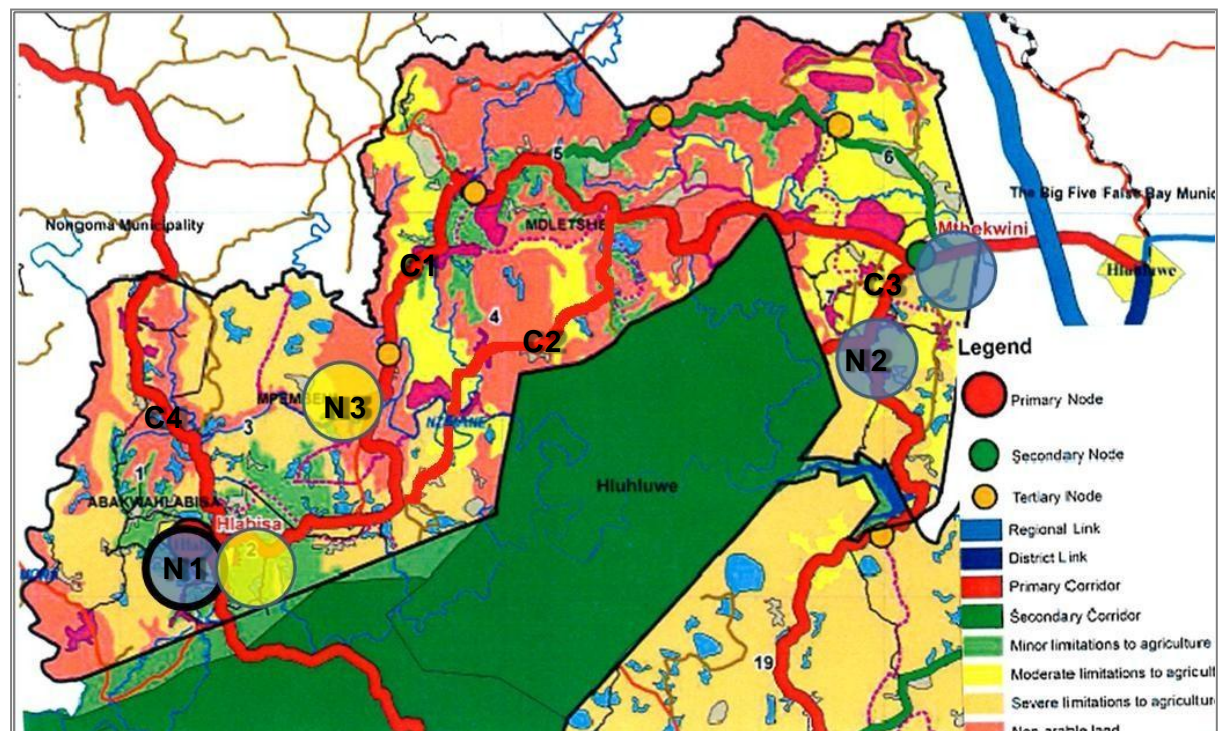
Tourism Nodes:
N1: Primary Node- Hlabisa Town
N2: Secondary Node- Memorial Gate
N3: Tertiary Node- Mpembeni

Figure 7- Hlabisa Local Municipality Initial Conceptual Spatial Tourism Investment Plan

## 5. STRATEGIC INSTITUTIONAL RECOMMENDATIONS

In order to ensure optimal and efficient implementation of the projects identified for Hlabisa Municipality's tourism sector, it is important to ensure that the institutional structure is capacitated and efficient enough to handle the weight of tourism development activity planned.

In light of the current tourism situation in Hlabisa, the following organograms illustrate the recommended institutional structure for Hlabisa tourism.

At present, tourism in Hlabisa is managed under two main streams- that of tourism development; mostly addressing issues of skills development and the formation of new tourism products; and that of tourism product care; mostly addressing issues of tourism marketing and existing tourism business care.

The organogram below illustrates the current structure of tourism development, where development of new tourism products, and skills development is managed by Umhlosinga Development Agency (UMDA) and Hlabisa Local Municipality at a district and local level respectively. Tourism care for existing tourism products is managed by Elephant Coast Tourism Association (ETA) at a district level, but no structure exists at the local level for marketing of the local area, and the care of existing tourism products.

Figure 8- Overview of Hlabisa Local Municipality tourism institutional structure
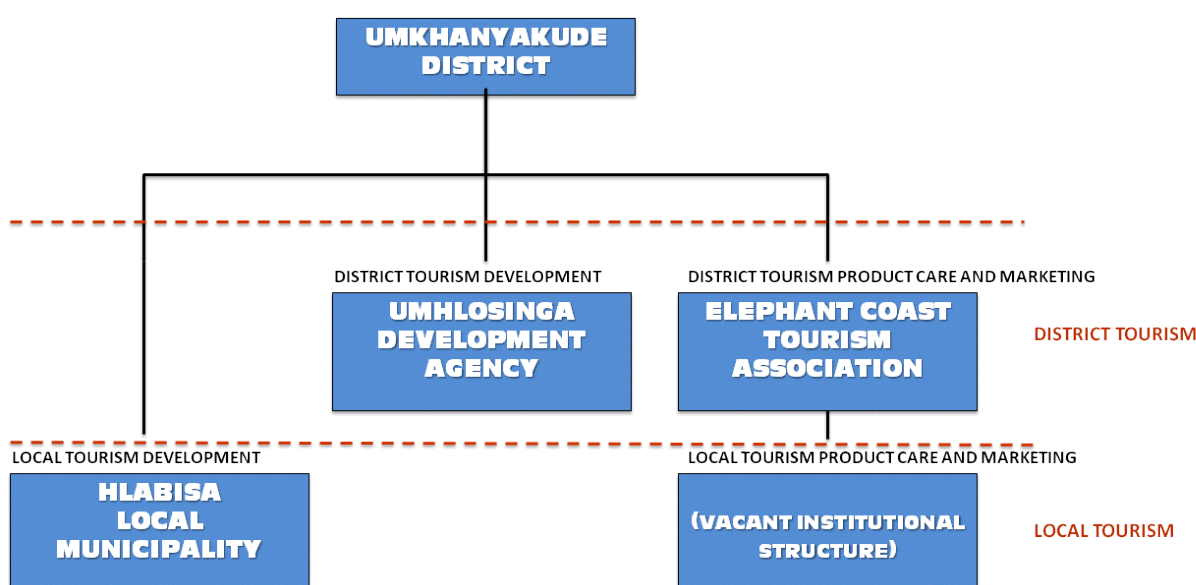
5.1. DISTRICT INSTITUTIONAL STRUCTURE

Following changes adopted at the National Tourism Indaba 2011, the province of KZN will no longer be divided into eight tourism (district) destinations. The province will be divided into four broad destinations, including Durban, The KZN Midlands, The KZN South Coast, and KZN North Coast (in which Umkhanyakude District will be grouped). The province will therefore no longer be marketed as per its eight destinations, with TKZN eventually discouraging marketing of the Elephant Coast as a separate tourism destination. There will there be no marketing association at the district level. ETA will remain a district tourism association which addresses the needs of tourism products at the district level.
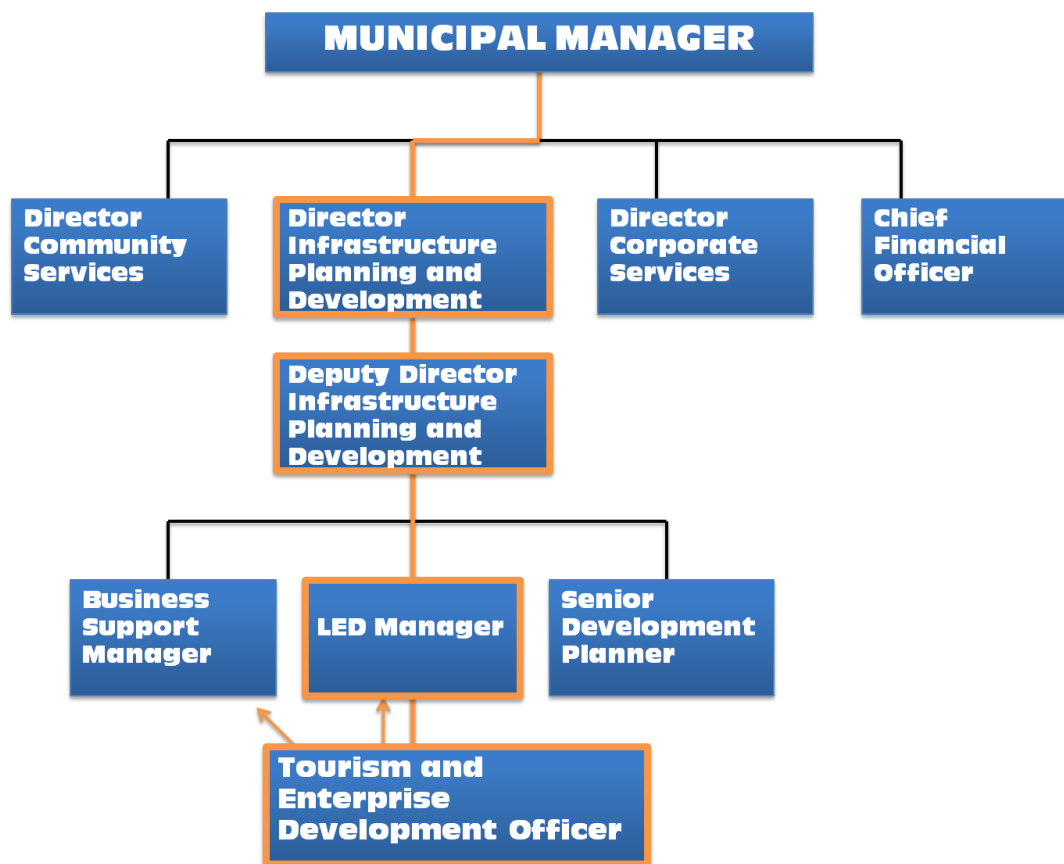
The implication of this for the local level, is that it increases the importance of, and need for an active and effective local tourism marketing body, or a local tourism body with an active marketing unit. It is important that this is addressed at the local level, such that coordinated and effective marketing for Hlabisa Municipality as a tourism destination, as well as it's tourism products is not only prioritised at the much broader provincial tourism destination level, but focussed on at the local level as well.

5.2.   LOCAL INSTITUTIONAL STRUCTURE

Local Tourism Development

Local tourism development is managed by Hlabisa tourism and illustrated in the organogram below. Hlabisa Municipality's tourism unit consists of one permanent staff member. The role of the current tourism personnel is split between tourism and other local economic development tasks, including business support.

Figure 9- Current tourism structure - Hlabisa Local Municipality tourism unit


Therefore, the current tourism unit is split between three different focuses. While LED, business support and tourism development are complementary and often constitute each other, it is recommended that tourism be addressed as a unit on its own.

The organogram below therefore recommends two main adjustments. It recommends that:

  ✓ The tourism unit be streamlined such that it is a solely tourism focused unit.
  ✓ Overtime, the unit itself would consist of a minimum of two personnel (second personnel may be acquired over time as the Hlabisa tourism sector expands).

This will be necessary as, within the next years, Hlabisa tourism development will require relatively more intense hands on implementation and coordination.

Figure 10- Recommended future tourism structure - Hlabisa Local Municipality tourism unit
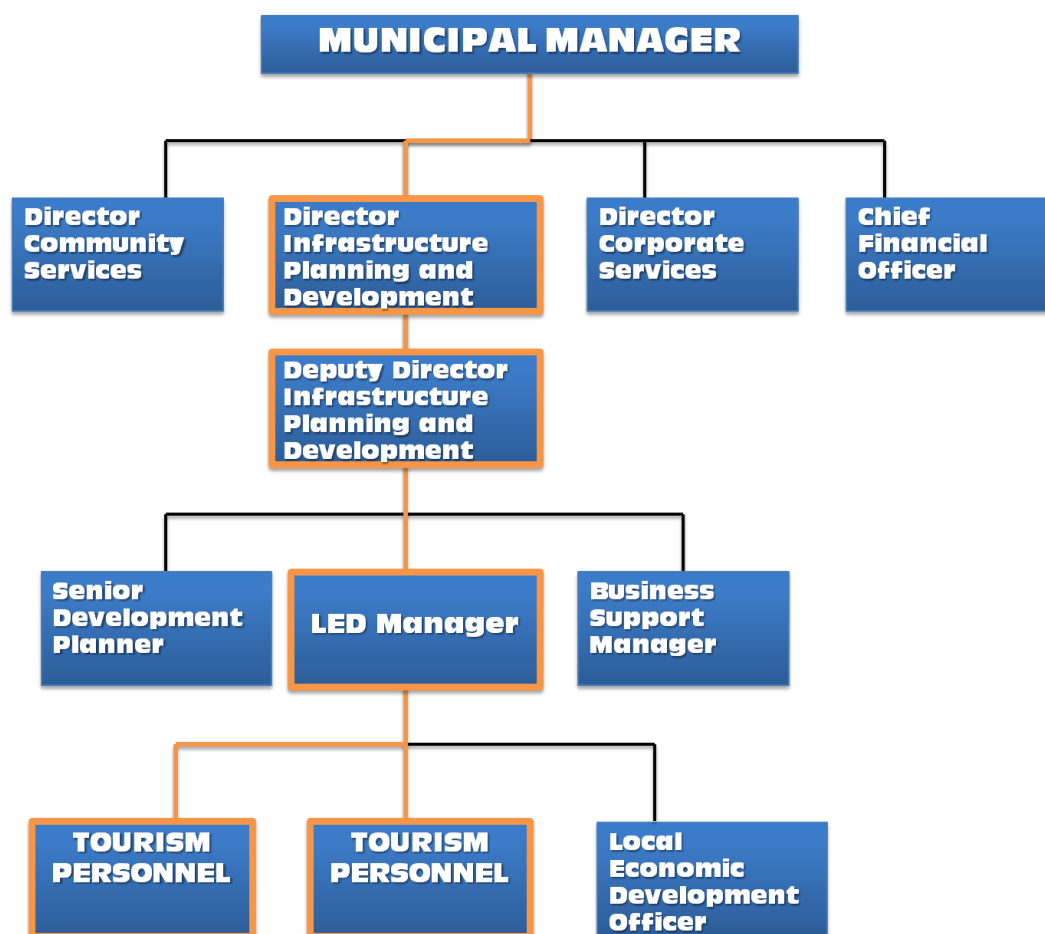
### Local Tourism Marketing and Tourism Business Care

With the development of tourism products at the local level, as well as the expected adjustments of ETA's marketing functions, it is important to prompt and facilitate the development of a local tourism association. The association will constitute existing tourism private sector including tourism products owners (e.g. accommodation owners), tourism service providers (e.g. tour guides), tourism support services (e.g.restuarants) and senior tourism officials (in this case, the tourism development officer). The membership structure is indicated below.

Figure 11-Recommended CTO membership structure
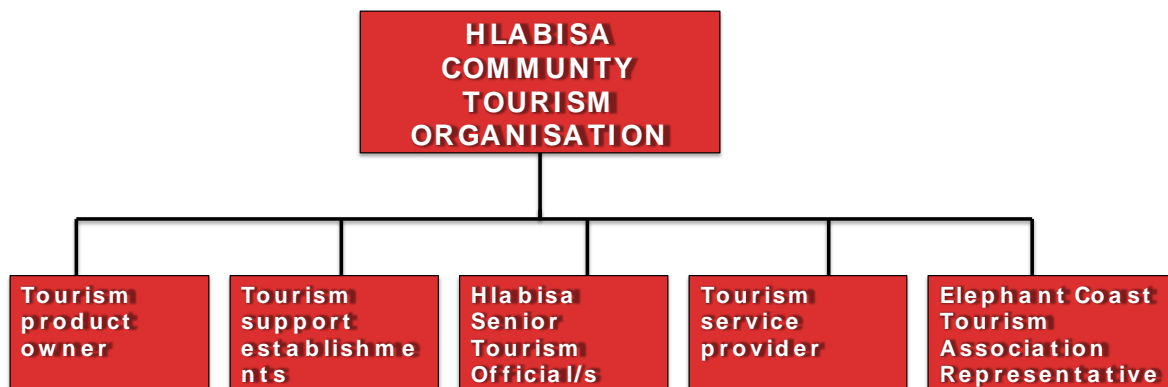
With regards to functionality, the CTO is a legal body which is responsible for the representation of private tourism businesses in the local area. Functions include local marketing, events, local tourism product quality control, communication with relevant tourism stakeholders, and liaison with the Municipality with regards to local tourism skills development needs.

Figure 12-Recommended CTO functional structure
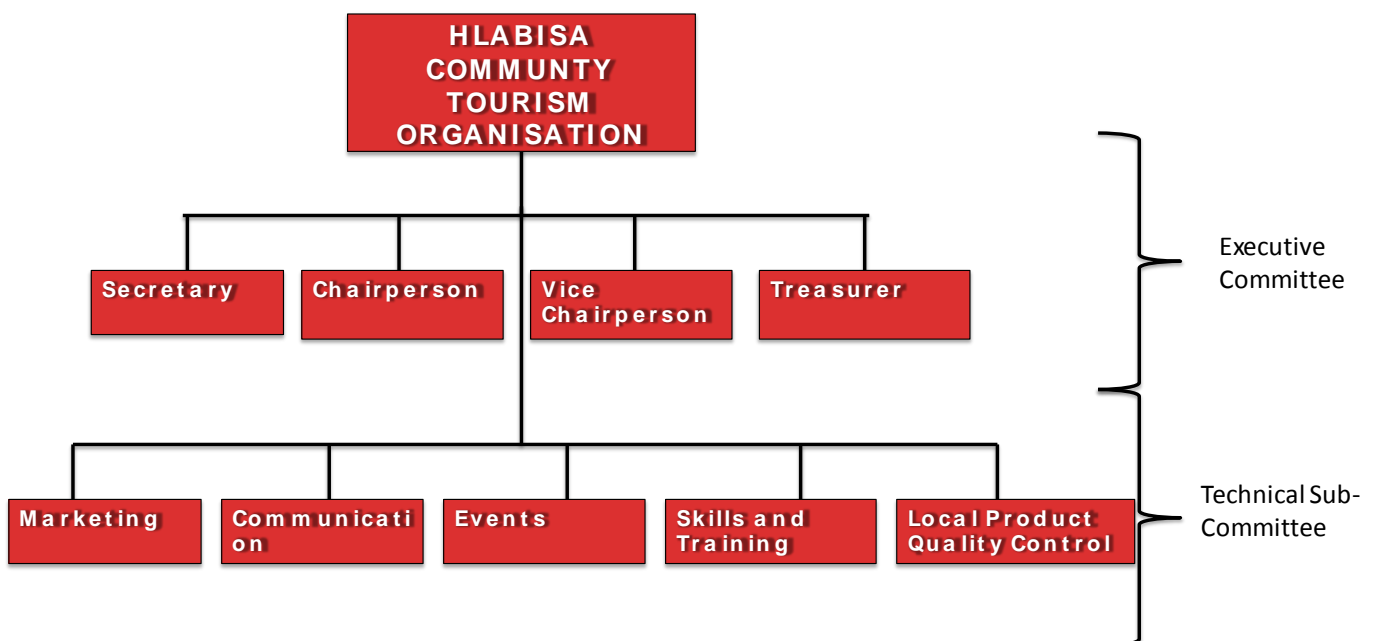
Importantly, the Hlabisa CTO must be jointly funded by the Municipality, members (through annual membership fees), and internal revenue, raised through events, community levies, and other forms of fundraising. Through paying a membership or affiliation fee, the Hlabisa CTO will be a member of the Elephant Coast Tourism Association, and therefore members will also be represented on a district level.

The final organogram for Hlabisa's tourism sector is therefore illustrated below.

Figure 13- Recommended Tourism Institutional Structure- Hlabisa Tourism Sector