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DEPARTMENT :
Economic Development & Tourism
PROVINCE OF KWAZULU-NATAL

KwaZulu-Natal

TOURISM MASTER PLAN



EXECUTIVE SUMMARY

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FOREWORD

The United Nations World Tourism Organization recently reported that international tourist arrivals reached the 1 billion mark in the year 2012 which clearly shows that the tourism industry will continue to have positive economic spin-offs throughout the world. Meanwhile the tourism industry is estimated to constitute 9% of the global Gross Domestic Product (GDP).

South Africa remains a competitive global player in this sector and our National Government has recognized the importance of tourism's contribution to the economy and this is evident in the New Growth Path and the Industrial Policy Action Plan (IPAP2) that both identify tourism as one of the priority sectors to help drive economic growth.

In order to ensure that the potential of tourism contribution to the economy is realized, the National Department of Tourism has developed the National Tourism Sector Strategy, which provides for a coordinated approach to the development and expansion of the tourism industry in the country.

The National Minister of Tourism has also reiterated that South Africa must be counted amongst the top 20 tourism destinations by 2020 hence as the Province of KwaZulu-Natal we have responded by developing the Provincial Tourism Master Plan. Our province is renowned for its all year round warm climatic conditions; magnificent beaches, beautiful scenery, diverse cultural and heritage tourism resources and as well as being home to two world heritage sites in the form of iSimangaliso Wetland Park on the north coast and uKhahlamba Drakensberg Mountain Ranges in the north west. It is our view, therefore, that the tourism potential of the province should be enhanced in order to continue to remain competitive with other provinces and the world.

The Provincial White Paper on the Development and Promotion of Tourism in KwaZulu-Natal (2008) identified the need for the development of the Tourism Master Plan that sets out the key strategic objectives and the plan to grow this sector. We are happy that we now have successfully developed the KwaZulu-Natal Provincial Tourism Master Plan which is a comprehensive long-term strategy to provide a structural framework for success in the development, management and monitoring of the province's tourism industry while pre-empting problems and possible mitigation actions.

The Master Plan succinctly spells out the vision for KwaZulu-Natal which wants to be globally renowned as Africa's top beach destination with the unique blend of wild life, scenic and heritage to be appreciated and enjoyed by all visitors. In order to achieve this vision, the plan has identified clearly defined objectives and targets which entail amongst other things the following: increased GOP levels and employment, foreign and domestic arrivals growth, improved geographic spread, and the transformation of the sector to accommodate all sections of our society.

It must be noted that the Provincial Tourism Master Plan is aligned to the KwaZulu-Natal Provincial Growth and Development Plan (PGDP) in that the targets are set for 2030 - with five year interval indicators that assist in the process of monitoring and evaluation of the progress made. The White Paper on the Development and Promotion of Tourism (1996) in South Africa state that, "Tourism is government led, private sector driven and community-based" economic pursuit hence the Tourism Master Plan has been developed under this premise and each and every stakeholder needs to play an active role to ensure effective implementation of the plan. It's no surprise that many people now define tourism as the goose that lays the golden egg that has to be properly nurtured and encouraged to breed more products essential in creating massive business and employment opportunities.

We are however cognizant of the fact that the benefits of tourism have not filtered through equitably across all our population demographics. With the Tourism Master Plan, we are hoping to address this challenge as we are advocating for more transformation in this sector which has to work for us all. We are therefore confident that this objective will be achieved through partnership with all stakeholders as we are already acknowledging a cordial relationship with our partners in the tourism business, labor, civil organizations and the broader community. We have demonstrated this during the development process of the Tourism Master Plan itself and therefore wish to re-emphasize the message that indeed working together we can achieve more and ultimately realize our strategic objectives.

We would therefore like to extend our greatest gratitude to our partners and reiterate that the onus of the implementation of the strategy does not only rest with government but it is a collective responsibility of all stakeholders and other allied support sectors. The Department of Economic Development and Tourism will continue to strive for more conducive environment for the prosperity of the tourism industry in the province and it is of course critical that our efforts are reciprocated by equal commitment from our various social partners. We have to pool our resources and energies towards a common goal that of elevating KwaZulu-Natal into a premier destination for both domestic and foreign visitors.



Michael Mabuyakhulu, MPP
KwaZulu-Natal MEC for Economic Development and Tourism



MR DESMOND GOLDING
HEAD OF DEPARTMENT FOR ECONOMIC
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INTRODUCTION

The development of the KwaZulu-Natal Tourism Master Plan (KZNTMP) derives its mandate from the White Paper on the Development and Promotion of Tourism in KwaZulu-Natal of 2008, which stipulates that one of the roles of the Provincial Government is to develop a Master Plan for tourism.

The plan sets out the key strategic objectives and how to achieve these objectives for the province ensuring alignment to the National Tourism Sector Strategy (NTSS), a blueprint for the tourism sector within South Africa and the Provincial Growth and Development Plan which clearly sets out economic growth targets for KwaZulu-Natal leading to 2030. The development of the KZNTMP has been strategically undertaken and coordinated through active involvement and participation of various industry stakeholders.

The KZNTMP is a comprehensive, strategic guide providing future direction for the development, growth, management and monitoring of tourism in the province. It bears testimony to the fact that, the

Department of Economic Development and Tourism (DEDT) continues to make great strides towards creating an enabling environment for tourism to flourish.

The KZNTMP sets a 2030 vision for tourism and further outlines specific key actions for the achievement of the set objectives, which includes increasing the tourism GDP levels, increase of tourism employment in the province, and ensuring growth in levels of foreign and domestic visitor arrivals to the province.

The KZNTMP is premised on four main strategic clusters, namely: Policy, Strategy, Governance, Research & Knowledge Management, Monitoring & Evaluation; Planning and Product Development; People in Tourism and Marketing. The aim of these clusters is to provide policy direction for tourism within the province; to prioritise and focus product planning and development to grow visitor numbers; to promote tourism awareness and understanding and also to ensure tourism growth and development in order to grow visitor numbers with a distinct emphasis on domestic tourism.

According to the South African Tourism Indicators, there were 7,0 million domestic tourism trips taken in the second quarter of 2012, an increase of 13% in comparison to the 6,2 million in the second quarter of 2011.

However the incidence of domestic travel remained constant at 6.6% in the first quarter of 2012. Visiting Friends and Relatives (VFR) remains the major reason for domestic trips however the share of VFR trips has decreased from 72% in the second quarter of 2011 to 71% in the second quarter of 2012. KZN has been ranked the third most visited province by domestic tourists in the same quarter. Therefore the KZNTMP sets the target for the province to achieve an average growth of 1.7% domestic trips per annum which also impact on the province regaining its first position as a most visited province, therefore the KZN share of national growth is set to increase from 29% to 30% by 2020. Events and business tourism play a crucial role in growing visitor numbers into the province and the plan thus ensures that, there are key interventions to be implemented to grow the MICE market.

The plan identifies the need for the development of key iconic projects aimed at increasing the geographical spread of tourism products and ensuring that the province continues to gain a competitive edge and remains the preferred destination. These recommended iconic projects are; Drakensberg Cable Car, Breakwater/Monument/Statue, Bluff Bridge, King Shaka Statue, Isandlwana Development Precinct, Beach Resort and Convention Centre.

The plan further calls for a radical shift in the province's marketing efforts; prioritising the domestic market as the key segment followed by SADC, rest of Africa & Indian Ocean Islands; and Europe, Americas, Asia as the second and third priority segment respectively. The introduction of SA Express flights to some of the SADC countries facilitates further penetration of the SADC market both for tourism and investment opportunities. The plan further recognises the number of sub destinations within the province competing with each other and therefore recommends a streamlined approach to marketing by promoting the different experiences the province offers; namely the Beach, Scenic and Wildlife experiences.

The tourism sector is one of KwaZulu-Natal's mechanisms to grow the provincial economy, paying more attention where substantial potential subsists. This can only be achieved through immense tourism development interventions and prioritization of such through ample budget allocation to effect the tourism development initiatives and by dynamic participation by the pertinent department and entities. Henceforth the province has a role to play in the development of tourism in order to fuel the economy of the province.

Mr Desmond Golding
KwaZulu-Natal HOD for Economic Development And Tourism



ABBREVIATIONS

ACSA	Airports Company of South Africa
B-BBEE	Broad Based Black Economic Empowerment
BEE	Black Economic Empowerment
COGTA	Cooperative Governance & Traditional Affairs (Department of)
CTO/LTO	Community/ Local Tourism Organization
DEDT	Department of Economic Development and Tourism
DTI	Department of Trade and Industry
GDP	Gross Domestic Product
IDC	Independent Development Corporation
KSIA	King Shaka International Airport
KZN	KwaZulu-Natal (Province)
KZNTMP	KwaZulu-Natal Tourism Master Plan
MICE	Meetings Incentives Conference & Exhibitions
NDP	National Development Plan
NDT	National Department of Tourism
NTSS	National Tourism Sector Strategy
PGDP	Provincial Growth Development Plan
SMME	Small Medium Micro Enterprise
SRI	Social Responsibility Implementation
STATSA	Statistics South Africa
TFCA	Transfrontier Conservation Area
TKZN	Tourism KwaZulu-Natal
UNWTO	United Nations World Tourism Organization
WHS	World Heritage Site



DEFINITIONS AND TERMINOLOGY

TOURISM

The activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited (STATS SA)

DOMESTIC TOURISM

The tourism of resident visitors within the economic territory of the country of reference (STATS SA)

DOMESTIC TOURIST

A resident visitor who visits within the economic territory of the country of reference (STATS SA)

DOMESTIC VISITOR

A visitor whose country of residence is the country visited. They may be nationals of this country or foreigners (STATS SA).

EMPLOYMENT

An activity in which a person performs, work for pay, profit or family gains. Such a person can be self-employed, an employer, an employee or a working family member (STATS SA)

TOURIST

A person who travel to and stay in a place outside his/her usual environment for more than twenty-four (24) hours and not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place (UNTWO definition).

ARRIVALS

Any person travelling to a place other than that of his/her usual environment for less than 12 months, and whose main purpose of the trip is other than the exercise of an activity remunerated from within the place visited (STATS SA).

GDP

The total value of goods and services produced within the geographic boundaries of a country for a specified period of time (STATS SA).



RESPONSIBLE TOURISM

Tourism that promotes responsibility to the environment through its sustainable use, responsibility to involve local communities in the tourism industry, responsibility for the safety and security of visitors and responsible government employees, employers, unions and local communities. (Tourism White Paper 1996)

MONITORING

Monitoring can be defined as a continuing function that aims primarily to provide the management and main stakeholders of an ongoing intervention with early indications of progress, or lack thereof, in the achievement of results. An ongoing intervention might be a project, programme or other kind of support to an outcome. (United Nations Development Programme)

EVALUATION

Evaluation is a selective exercise that attempts to systematically and objectively assess progress towards and the achievement of an outcome. Evaluation is not a one-time event, but an exercise involving assessments of differing scope and depth carried out at several points in time in response to evolving needs for evaluative knowledge and learning during the effort to achieve an outcome. All evaluations—even project evaluations that assess relevance, performance and other criteria—need to be linked to outcomes as opposed to only implementation or immediate outputs. (United Nations Development Programme)

1. STRATEGIC FRAMEWORK

1.1 GLOBAL CONTEXT

The United Nations World Tourism Organization (UNWTO) forecast that International tourist arrivals will reach one billion mark; for the first time in history by the end of 2012. This bears testimony to the ever increasing tourism growth globally, thus the contribution of tourism to the global economy cannot be overstated. This happens against a volatile global environment as a result of the Arab Spring which posed a great threat to the world peace, safety and security; severe economic recession, increased fuel prices and Euro-zone financial crisis which wrecked the global economy.

However, tourism has continued to show resilience and recorded a positive growth of 5% between January and June 2012 compared to the same period in 2011. Currently tourism is estimated to constitute 9% of the global GDP. Indeed, tourism is seen as an export, contributing to huge foreign exchange earnings, it is for this reason that many countries globally continue to invest in proper planning and tourism research to maximize the potential of tourism contribution to their local economies.

1.2 SOUTH AFRICAN CONTEXT

South Africa as an emerging economy has not remained unaffected by the turmoil in other emerging economies world-wide. The fact that South Africa was able to grow through this turmoil reflected positively on the inherent strength of our economy, on the soundness of our economic and fiscal policies and the political stability within the country. South Africa's peaceful and stable transition to democracy has been recognised as a major achievement of the 20th century. Political stability has been key to building and keeping investor confidence also contributing in driving the growth of the tourism sector.

The country has magnificent attributes such as its scenic, outdoor atmosphere, sunny climate, cultural diversity and reputation for delivering value for money continuously makes its one of the world's fastest growing leisure, business and travel destination.

Tourism is recognised as the modern day engine of growth and this was attested in 2012 by the G20 Heads of State who recognised tourism as a driver of growth and development as well as a sector that has the potential to spur global economic recovery. The South African government has prioritised tourism as a key sector with potential growth and aims to increase tourism contribution to R 499 billion by 2020.

For the sustainability of the tourism sector, domestic tourism is one source of revenue and employment contributing 52% of total tourism consumption. Visiting Friends and Relatives remains the main reason for taking trips followed by holiday makers. The first six months of 2012 showed an impressive 10.5% growth which doubled the global tourism rate of 5%. South Africa attracted 4 416 373 tourists to the country between January and June 2012.

"Building an economy that creates opportunities for all and making tourism to work for us All"



The tourism industry experienced growth in overseas visitors recording 17.1% growth in arrivals from outside of the African continent. The National Tourism Sector Strategy and the Domestic Tourism Growth Strategy serve to ensure that plans are in-place to increase tourist arrivals to South Africa and has demonstrated good results as attested by the 2012 tourist arrival figures.

The inclusion of the country within BRIC has allowed the country to tap into other markets and further aims to further its developmental agenda which incorporates tourism, providing a huge shift in the country's tourism marketing efforts towards the BRIC countries.

2. OVERVIEW

2.1 BACKGROUND

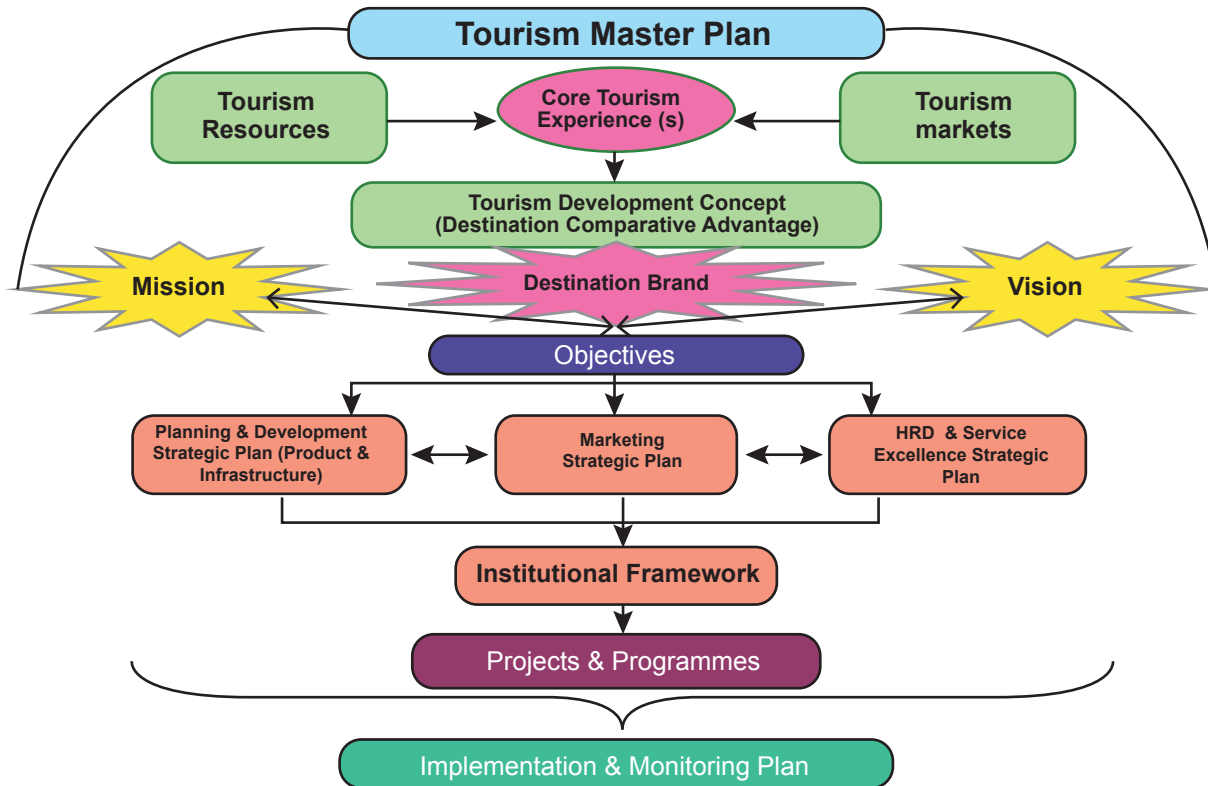
Successful destinations manage their tourism products and experiences in a systematic manner that over time ensures the destination continuously provides an unforgettable experience. For Destination KwaZulu-Natal ("KZN") to continue to provide an unforgettable experience it will need to vigorously manage its strategic direction, product offering and investment opportunities. Linked to this it will need to continuously improve its current infrastructure which is an important component in the total offering to the visitor.

Within this context the purpose of the KwaZulu Natal Tourism Master Plan ("KZNTMP") is a comprehensive long-term strategy that provides a structural framework for success in the development, marketing, management and monitoring of tourism while pre-empting problems and mitigating impacts. The KZNTMP is an essential component of KZN as a sustainable tourism destination, and looks at the 'big picture', providing a blueprint to bring individual strategies together to serve one vision. It is therefore an overarching plan that guides all other tourism plans in the province. The KZNTMP covers a 19 year period to 2030, detailed objectives and the vision are based on achieving the vision and targets, and the process envisages a revised vision to guide the industry beyond 2030.

2.2 METHODOLOGY AND APPROACH

The Tourism Master Plan was developed in-line with the National Tourism Sector Strategy (NTSS) which was developed in 2011 by the National Department of Tourism. The processes followed a series of extensive consultation with industry role players for input and buy-in.

The figure below shows approach to tourism destination planning which forms the basis of the strategy





3. STRATEGIC DIRECTION

3.1 VISION

By 2030 KwaZulu-Natal will be globally renowned as Africa's top beach destination with a unique blend of wildlife, scenic and heritage experiences for all visitors.

3.2 MISSION

The KwaZulu-Natal Tourism Master Plan sets out the mission towards the achievement of vision as follows:

- Geographically spreading the benefits of tourism throughout the province;
- Growing the visitor numbers and visitor yields;
- Focused (prioritized) tourism development growing from the core of beach & Durban;
- Superlative customer experiences – quality, authenticity and service excellence;
- Public & private sector collaboration;
- Demand-led development, meeting market potential and needs; and
- Responsible tourism ensuring sustainability and benefits for all.”

3.3 VALUES

Our tourism industry is further guided by these values:

- Trust;
- Upholding the values of the Constitution;
- Transformation;
- Transparency and integrity;
- Collaboration;
- Accountability;
- Being warm and welcoming to our visitors;
- Respect; and
- Flexibility and adapting to change.

3.4 GUIDING PRINCIPLES

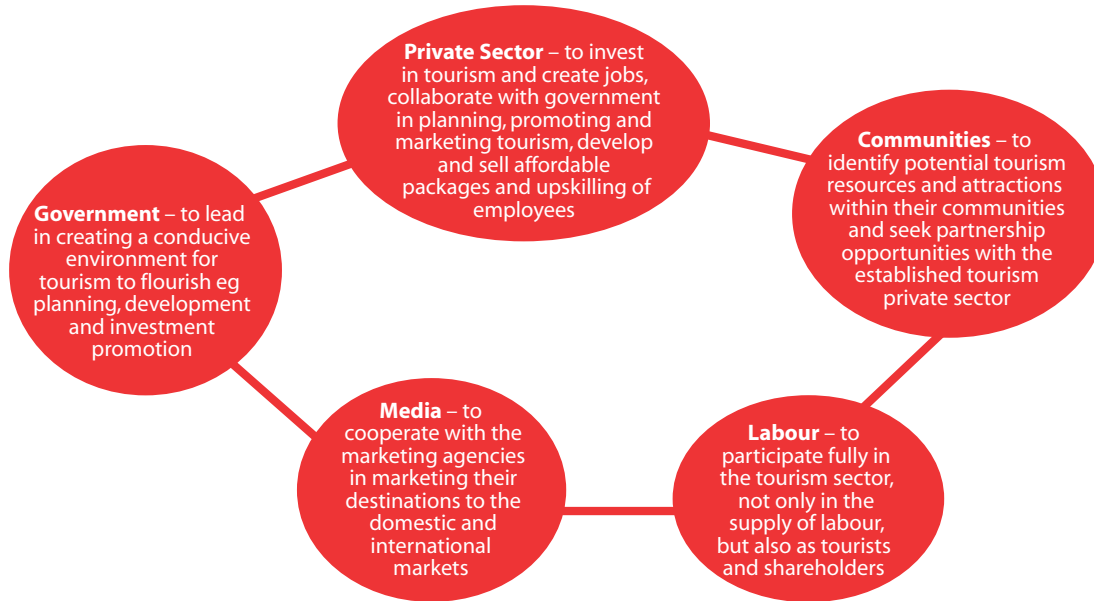
The strategy is also underpinned by a further set of principles. These principles clarify some key tenets of how the strategy will be actualised.

- The plan refers to visitors because, we all know from every sector of society, understand the term visitor and know how to treat visitors. Furthermore the use of the word visitor avoids any negative connotation of tourism as only elite, foreign leisure arrivals. Finally the use of the word visitor ensures that we understand that we are referring to people who are travelling and visiting within the province for all purposes, including business, medical, conference, to visit friends and relatives etc.
- We will sell experiences and not destinations. This will be underpinned by always referring to the experience first and to geography second (i.e. information as to where).
- Municipalities have different tourism strengths and therefore they are not equal in tourism development. As in many sectors of the economy, different places have different strengths. Certain areas have major tourism strengths, others have medium tourism strengths and some have limited tourism strengths. Therefore the level of emphasis on tourism development will differ from area to area.
- The KZN Tourism Master Plan is aligned to:
 - The National Tourism Sector Strategy (NTSS).
 - The National Growth Path.
 - The National Development Plan.
 - The Provincial Economic & Spatial objectives.



3.5 KEY PARTNERS IN TOURISM GROWTH

- The White Paper on the development and promotion of tourism in South Africa states that “Tourism is government led, private sector driven and community-based”.
- The KwaZulu-Natal Tourism Master Plan has been developed under these premises and each and every role player must play their role:



4. STRATEGIC OBJECTIVES, TARGETS AND THRUSTS

4.1 STRATEGIC OBJECTIVES & TARGETS

It is crucial that a strategy or plan has clear objectives or goals, and that these are then quantified to enable monitoring of the implementation of the strategy. In order to achieve the vision, objectives have been set in each of the following areas:

- Increase the tourism GDP levels;
- Grow the levels of all foreign visitor arrivals to the province;
- Grow the levels of domestic visitor arrivals to the province;
- Increase tourism employment in the province
- Improve the geographic spread of tourism within the province;
- Ensure that Durban becomes/remains THE place to holiday for South Africans and other key markets;
- Improve overall visitor service and satisfaction levels throughout the province in all areas in which a visitor is serviced (i.e. beyond the recognised tourism plant to include retail, banking, toll roads etc.;
- Achieve significant transformation in the sector;
- Grow the events and meetings incentives and exhibitions sector (“MICE”) as a key and important market area for the province;
- Improve other niche tourism experiences for which the province has potential and develop these markets.

Increase tourism GDP levels & employment

Foreign tourist arrivals growth

Domestic tourist arrivals growth

Improved geographic spread

Durban is THE place to holiday

Improved visitor service & satisfaction

Transformation of the sector

Every & MICE market growth

Progress in niche markets

4.2 TARGETS

Targets have been set for the above objectives and are presented in the tables on the following pages. The targets are based on 2009/2010 baseline data where available. In many instances only partial or no baseline data is available, and the tables indicate where research is needed to establish the baseline and allow the development of targets/measurable objectives. The same research will be required into future years to measure attainment of targets.



Targets are set for 2030 with five year interval indicators. In order to synchronise with the provincial 2030 economic strategy, preliminary indicative targets are shown below. The tables also include explanations of the rationale behind the target setting and growth percentages which are required to attain the targets

	More detail	2009 base	2015	2020	2025	2030	Growth/change rationale
Increase GDP	Industry (direct)	R22bn (5,6% of GDP)	R35.2bn	R51.6bn	R75.8bn	R111.6bn	<ul style="list-style-type: none"> Based on the projected numbers and spend of domestic and international visitors The 8% increase as noted in 2009 was used for these projections Projections based on the proviso that there is no change in percentage increase through time Same implied multipliers as used by TKZN.
	Economy (direct & indirect impact)	R32bn (8,3% of GDP)	R50.6bn	R74.3bn	R109bn	R159.9bn	
Increase Foreign Tourism	Total foreign tourists	862 460	1 129 609	1 405 676	1 749 212	2.18 million	<ul style="list-style-type: none"> Avg growth 2009 - 2020 4,6% - compared to NTSS 3,66% pa, 4,47% pa to 2030 This is sum of inter-continental and African, i.e. all foreign. If NTSS objective attained, KZN share goes from 11,8%/12,3% to 13,8% 2020
	Inter-continental tourists	348 434	416 045	482 307	559 124	648 000	<ul style="list-style-type: none"> Avg growth 2009 - 2020 3,0%, and same rate 2020 - 2030 Projected annual growth rates of 5% - 6% post 2011, Total additional tourists 2011 – 2020: 94 680, 14 000 - 22 000 more pa
	African tourists	514 026	720 937	955 102	1 266 812	1,68 million	<ul style="list-style-type: none"> Avg growth 2009 - 2020 5,8%, then same rate 2020 to 2030
Increase Domestic Tourism	Domestic trips	8 800 000	8 950 000	9 164 806	9 632 302	10 224 881	<ul style="list-style-type: none"> Avg growth 1.7% pa, taking account of decreases in 2010 and 2011 KZN share of national grows from 29% to 30% by 2020
	Domestic holiday trips	3 168 000	3 221 856	3 281 000	3 448 364	3 660 507	<ul style="list-style-type: none"> KZN maintains its 29% share; Average growth as per provincial strategy of 1% pa resumes after decline in 2010
	Domestic non-holiday trips	5 632 000	5 727 744	5 883 806	6 183 938	6 564 374	<ul style="list-style-type: none"> After decline in 2010, increased and sustained average growth rate of 1.7% as per provincial strategy
	No. of domestic tourists including children	Research required to develop a baseline and targets					<ul style="list-style-type: none"> Family holidays - key market for the province therefore should track
	Domestic holiday day-trips	22 960 000	23 350 320	23 911 836	25 131 577	26 413 538	<ul style="list-style-type: none"> Growth resumes and continues at the same rate as domestic holiday, after 2010 decline

More detail		2009 base	2015	2020	2025	2030	Growth/change rationale
Increase GDP	# of direct jobs supported by the sector	100 000	141 910	183 820	204 775		<ul style="list-style-type: none"> Based on the projected number and spend of domestic over-night tourists and international visitors, and using the same implied multipliers as used by TKZN. Result is 111 480 more jobs Is a high percentage of the national job growth target, indicating that the national job creation ratios applied are less than those used by TKZN
	# of direct & indirect jobs supported by the sector	133 000	188 740	244 480	272 350		

SOURCES: SOUTH AFRICAN TOURISM (SAT), STATISTIC SOUTH AFRICA (STATS SA), WORLD TRAVEL AND TOURISM COUNCIL (WTTC)



	Main Objectives	More detail	2009 base	2015 target	2020 target	2025 target	2030 target
Improved Visitor Service and Satisfaction	Foreign (including regional) Visitors	Experiences that equal or surpass the expectations of our visitors.	<ul style="list-style-type: none"> Adapt /use National 's visitor satisfaction process Add overall and key element satisfaction ratings to all provincial research. 	<ul style="list-style-type: none"> Develop targets Significant improvement over 5-years 	Conduct annual visitor satisfaction surveys	Conduct annual visitor satisfaction surveys	Conduct annual visitor satisfaction surveys
	Domestic Tourists						
Transformation	Increase the number of tourism industry companies with Tourism Charter BB BEE ratings	Increase # of companies accredited and accredited at higher levels	<ul style="list-style-type: none"> Include BBBEE certification and level in registration/ product database. Review latest TECSA research (2011 release) for extent of this data on KZN, or develop own research and targets (2010-2012) 	<ul style="list-style-type: none"> Implement recommendations of the baseline study 50% compliance with Tourism Sector Codes 	90% compliance with Tourism Sector Codes	100% compliance with Tourism Sector Codes	100% compliance with Tourism Sector Codes
		Decrease # companies accredited at lower levels					
		Increase the number of tourism industry companies reaching Tourism Charter Targets	By type of company and score card category by the target years - 2012/2017	<ul style="list-style-type: none"> Use updated 2011 TECSA base line r research 2007 - overall industry score 52,4% of old Tourism Charter targets 	<ul style="list-style-type: none"> Develop targets , if KZN base higher than national then higher target NTSS target 70% of tourism charter 2012 /2017 	90% compliance with Tourism Sector Codes	100% compliance with Tourism Sector Codes

	Main Objectives	More detail	2009 base	2015 target	2020 target	2025 target	2030 target
Events and Mice Market	Increase the number of sporting and leisure events in the Province	Grow the number of events and attendance at events.	Define type & size of events, and develop baseline of number and size of events	Aim for good growth - 7% in events pa, and 3% in attendance pa/per baseline	10% growth in events pa, and 5% growth in attendance pa/per baseline	15% growth in events pa, and 5% growth in attendance pa/per baseline	20% growth in events pa, and 5% growth in attendance pa/per baseline
		Host "Big" sporting Events	<ul style="list-style-type: none"> World Cup in 2010 One "Big" event every 10 years e.g. All Africa Games, Commonwealth Games, Olympic Games, CAF Cup etc. 	Continuously bid for big international event through Convention Bureau	Host one big international event	Continuously bid for big international event through Convention Bureau	Host one big international event
				<ul style="list-style-type: none"> Develop targets based on growth of 3,5% pa. Possibly use the registration/product database for baseline and tracking work with the convention bureau & ICC 	Develop a new International Convention Centre North of Durban / expand the existing Durban ICC	Continuously bid for big international event through the Convention Bureau	Continuously bid for big international event through the Convention Bureau
		Improve the Provincial ICCA ranking	<ul style="list-style-type: none"> 178th in 2010 up from 231th in 2009 	<ul style="list-style-type: none"> In top 120 by 2015 Work with the convention bureau & ICC 	<ul style="list-style-type: none"> In top 100 Work with the convention bureau & ICC 	<ul style="list-style-type: none"> In top 75 Work with the convention bureau & ICC 	<ul style="list-style-type: none"> In top 50 Work with the convention bureau & ICC
		Increase the number of Business Tourist visits to the province	<ul style="list-style-type: none"> Measure the number of foreign and domestic business tourist visits for baseline SAT research to be unpacked if possible for foreign business 	<ul style="list-style-type: none"> Similar or higher growth than for no. of events eg 3,5% pa or more 	3.5% increase in business tourism	3.5% increase in business tourism	3.5% increase in business tourism



	Main Objectives	More detail	2009 base	2015 target	2020 target	2025 target	2030 target	
Progress in Niche Markets	Cruise Tourism	Grow the number of cruise ship visits to the Province - Durban and Richards Bay	2010 – 2011 - Durban 67, Richards Bay 15	<ul style="list-style-type: none"> • Durban 100 pa by 2015, • Richards Bay – 25 pa by 2015, • 10% growth pa to 2015 and 8,5% growth pa from 2015 - 2010. • Worldwide growth is 7% pa. • Low base & new terminal in Durban 	<ul style="list-style-type: none"> • Durban- 150 pa by 2020 • Richards Bay-38 pa by 2020 	<ul style="list-style-type: none"> • Durban- 200 pa by 2025 • Richards Bay-51 pa by 2020 	<ul style="list-style-type: none"> • Durban- 250 pa by 2030 • Richards Bay-64 pa by 2020 	
		Grow the number of cruise passengers visiting the province	Durban 157 424 in 2010-2011. Baseline needed for Richards Bay	<ul style="list-style-type: none"> • 230 500 by 2015, • Richards Bay target to be developed 	340 000 by 2020/ per baseline	450 000pa/per baseline	560 000pa/per baseline	
		Increase no. cruise ships provisioning out of Durban	Baseline needed	Per baseline				
	Avi Tourism	Increase avitourists	Research to develop baselines					
	Adventure Tourism	Increase hard/ pure adventure offerings	Research to develop baseline required - use product database/ registration			Per baseline to be determined	Per baseline to be determined	Per baseline to be determined
		Increase adventure tourists						
	Rail Tourism	Increase rail tourism passengers	Research to develop baselines					
Hunting	Increase hunting visitors							

5. SUMMARY OF STRATEGIC CLUSTERS

The KZN TMP is premised on four main strategic clusters, namely:

- Cluster One: Policy, Strategy, Governance, Research & Knowledge Management Monitoring & Evaluation
- Cluster Two: Planning and Product Development
- Cluster Three: People in Tourism
- Cluster Four: Marketing

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

The strategic thrusts under the cluster for Policy, Strategy, Governance, Research & Knowledge Management, and Monitoring & Evaluation are:

- Efficient Management of Tourism
- Collaborative Effective Partnerships
- Adequate funding for the tourism function (s)
- An appropriate regulatory framework
- Research & Knowledge Management
- Monitoring & Evaluation
- Promotion of Green Principles in Tourism
- Responsible Tourism

This strategic cluster aims at improving the management of, and coordination and communication on tourism issues; thereby improving effectiveness of tourism interventions; improving partnerships and funding for tourism; and putting in place the necessary projects and programmes to measure and monitor certain aspects of the tourism sector.



Each of the above strategic thrusts are explained and expanded into more detail with specific action plans in the tables below.

The objectives for the efficient management of tourism strategic thrust are to improve coordination of tourism thereby reducing duplications, improving effectiveness of support and interventions, and improving the scope and range of tourism support and interventions

The table below shows the main action steps under this strategic thrust.

Strategic Thrust	Tourism Management Action Plans
Efficient management of tourism	<ul style="list-style-type: none"> • Refine the tourism institutional framework in KZN • Develop mechanisms for public/private sector communication & collaboration • Raise the profile of tourism within government

Strategic Thrust	Tourism Management Action Plans
	<ul style="list-style-type: none"> • Develop stakeholder communication & feedback mechanisms • Clearly define the roles, capabilities & skills required & provide budgetary guidelines for metro, district & local government in tourism • Create a process or forum to integrate EKZNW, Amafa, Ingonyama Trust, IsiMangaliso etc. into tourism development & planning

The objectives for the collaborative effective partnerships strategic thrust are to ensure that tourism is a true partnership between the public and private sector and that the public sector collaborates effectively across its multiple levels and departments, and that opportunities / mechanisms are created for collaboration between stakeholders

The main action steps under this thrust are summarised in the table below.

Strategic Thrust	Collaborative Partnerships Action Plans
Collaborative effective partnerships	<ul style="list-style-type: none"> • Mechanisms to involve private sector in government decision-making / strategy formulation • Develop common understanding of public & private sector roles & responsibilities • Participation of government in private sector association meetings & events • Demonstrate government support for key private sector initiatives • Mechanisms for collaboration between the different levels & departments in government

The objective of the adequate funding for tourism strategic thrust is to improve budget allocations to tourism, and the main action steps are shown below.

Strategic Thrust	Funding for Tourism Action Plans
Adequate funding for the tourism function(s)	<ul style="list-style-type: none"> • Benchmark budgetary allocations for tourism at provincial, metro, & municipal level & recommend budget ranges based on level & tourism status • Review & prioritise the provincial tourism budget (DEDT & TKZN) • Implement a system to rate & approve tourism projects submitted for funding • Investigate alternative revenue generating models for tourism funding • Provide funding support for CTOs & tourism associations

The objective of the appropriate regulatory strategic thrust is to reduce the levels of bureaucracy within government related to tourism, and the main action steps are listed below.

Strategic Thrust	Regulatory Framework Action Plans
An appropriate regulatory framework	<ul style="list-style-type: none"> • Identify quick win projects & mechanisms to speed up approval processes for these • Identify bureaucratic challenges & address these • Help desk to handle queries & complains on approval processes

The objectives of the strategic thrust research and knowledge management are to provide meaningful information and analysis timelessly to stakeholders in the tourism sector, provide efficient knowledge and database management systems for the tourism sector, and to provide measurements to track progress on targets and objectives. The key action steps are shown below.

Strategic Thrust	Research & Knowledge Management Action Plans
Research & Knowledge Management	<ul style="list-style-type: none"> • Agree and implement institutional responsibility & capacity for research & information • Partner the Public Sector research and knowledge capacity with a University level tourism centre of excellence • Fund and support academic and applied research into the industry • Develop a centralised provincial tourism information system & database that is accessible by public/private sector • Mandate & enforce registration of all tourism enterprises/businesses operating in KZN • Develop & implement plans to disseminate information, research & intelligence to the various stakeholders



The objectives of the monitoring and evaluation of strategic thrusts are to ensure that clear measurable targets are set for tourism and to evaluate all support and interventions in terms of effectiveness. The main action steps are shown below.

Strategic Thrust	Research & Knowledge Management Action Plans
Monitoring & evaluation	<ul style="list-style-type: none"> • Implement annual performance plans within government & relevant institutions • Develop a research programme & impact assessments to monitor & measure the attainment of targets & objectives • Assign responsibility for M&E at various levels of government

The objectives of the promotion of green principles in tourism strategic thrust are to encourage new developments and existing businesses to adhere to green principles, to provide incentives for green principles to be adhered to within the tourism industry and overall to achieve long-term sustainability of the sector. The main action steps are outlined below.

Strategic Thrust	Research & Knowledge Management Action Plans
Promotion of green principles in tourism	<ul style="list-style-type: none"> • Ensure that green principles are incorporated into new tourism developments. • Investigate options for the creation of incentives for incorporation of green principles • Investigate the potential to link green principles to grading/awards system. • Investigate and develop a programme for carbon offsets within the KZN tourism sector.

The objectives for the responsible tourism strategic thrust are to ensure that clear measurable targets are set for tourism and to evaluate all responsible support and interventions in terms of effectiveness. The main action steps are shown below.

Strategic Thrust	Responsible Tourism Action Plans
Responsible tourism	<ul style="list-style-type: none"> • Implement a Responsible Tourism Improvement Plan for all provincially owned or managed tourism assets • Assess the current status of responsible tourism in the province & develop detailed Action Plan • Create visitor awareness of responsible behaviour in communities & the environment • Awareness & capacity-building on responsible tourism for government tourism officials & tourism marketing organizations • Provide support to tourism businesses & communities to implement responsible tourism • Embed Responsible Tourism messaging in marketing activities • Link to & participate in national Responsible Tourism activities

5.2 CLUSTER TWO: PLANNING & PRODUCT DEVELOPMENT STRATEGIC PLAN

Planning and Product Development Strategy covers a vast range of activities, it comprises sub-clusters for each major area.

5.2.1 OBJECTIVES

The overall objectives guiding the formulation of the planning and development strategy are as follows:

- Clearly guided spatial development of tourism over time;
- Tourism product development in line with the core tourism experiences and priority niches;
- Appropriate development of supporting facilities and services;
- Clear role for public sector at all levels in tourism planning and product development;
- Identification and stimulation of development for key tourism products;
- Improved development approval processes;
- Successful investment promotion;
- Adequate accessibility and mobility to and within the province to support tourism; and
- Adequate and appropriate infrastructure to support tourism development.

5.2.2 STRATEGIC FOCUS AREAS

The planning and product development strategy is based on strategic focus areas in terms of the core tourism experiences. The primary focus area is the Durban beach experience, and priority will be given in all planning and product development to improving the actual, and perceptions of, this experience. All other areas of focus are secondary. This does not mean that activities and attention will not occur from the outset to develop these areas, but when decisions regarding resource allocation options are considered for competing priorities, the priority will, in the initial years, be the beach experience in Durban.



The secondary areas are:

- iSimangaliso WHS, Lubombo TFCA and Elephant Coast for wildlife experiences
- Ukhahlamba Drakensberg WHS/Maloti Drakensberg TFCA and Pietermaritzburg & Midlands – for scenic experiences
- Heritage Tourism – for overall experience uniqueness
- North Coast – beach experience
- South Coast - beach experience

MAP 1: KWAZULU-NATAL CORE TOURISM EXPERIENCES



Map 1 shows the core tourism experiences that have been identified in KwaZulu-Natal province and provides an indication of broad spatial areas in which the various core experiences can primarily be found in KZN. However, the core experiences are not limited to these areas; they are predominantly found here, but they may be found in other areas of KZN generally to a lesser extent.

The Heritage experiences pervade the province, and the strategy is that different KZN heritage experiences are used as a backdrop or ambience for all provincial experiences, as well as being additional activities that people enjoying the other core experiences can partake in. Over and above this, many of the heritage experiences will also be niche products enjoyed by some tourists who travel specifically for that experience only.

The main development action steps under each experience are summarised below. A selection of the master plan maps are shown, however they are for indicative purposes only, as the full size maps should be viewed in the separate map annexure to the main report.

Key:

- Yellow = beach experience
- Green = wildlife experience
- Blue = scenic experience
- Brown = heritage experience

5.2.3 BEACH TOURISM

The strategic thrusts for the Beach tourism strategy and the major action plans associated with them are detailed in the table below.

Strategic Thrust	Responsible Tourism Action Plans
<p>Improve Durban Experience</p> <p>This thrust aims to make Durban THE beach destination, the African “Miami” that appeals to all markets – with the negative crime & grime perception erased</p>	<ul style="list-style-type: none"> • Improve the roads and facilities in the beachfront precinct including one road back from the beachfront (spatial) • Identification of catalyst projects • Beach front management - Durban Beach Front Improvement District • Complete the Point Development - consider an iconic bridge linking the Point to the Bluff • Develop a Tourism Strategy for eThekwinini Metro • Reinstate Blue Flag or other similar accreditation at Durban beaches • Address safety and security issues in Durban, including beachfront precinct and disaster management
<p>Durban Beach Services, Activities & Facilities</p>	<ul style="list-style-type: none"> • Identify areas to create promenade 'spill-out' from restaurants and other appropriate facilities to create exciting ambience, including nightlife entertainment • Develop more retail / shopping / restaurant activities at ground level of flats and other buildings along beachfront roads in priority areas • Manage urban decay in terms of rundown buildings and enforce cooperation from private owners



MAP 2: EXISTING AND NEW BEACH NODES



Strategic Thrust	Beach Tourism Action Plans
<p>New Beach Resort Nodes</p> <p><i>Mixed level for local and international tourists, with self-catering and catered, beach resorts with good road/air access and good bathing beach</i></p>	<ul style="list-style-type: none"> • Node identification and node master planning – detail level for first node, and general for second node, third node "on long term horizon only" (Spatial) • Investigation into "breakwaters", beach augmentation to create gentle bathing beach – possible use of iconic interventions • Development of renowned branded beach resorts

5.2.4 SOCIAL TOURISM

Strategic Thrust	Responsible Tourism Action Plans
Social Tourism Beach Facilities <i>KwaZulu-Natal leads the country in providing social tourism or budget tourism facilities to "blue collar" markets</i>	<ul style="list-style-type: none"> • Identify government assets and spatial node in Durban for social / budget tourism product and develop a master plan to create a social tourism node with appropriate main and supporting facilities • Identify 2nd social/budget tourism facilities node

5.2.5 BEACH TOURISM FACILITIES

Strategic Thrust	Beach Tourism Action Plans
Maintain / upgrade / tweak / enhance existing beach product (North and South Coast)	<ul style="list-style-type: none"> • Assign responsibilities for maintain and upgrade to relevant local level (see institutional framework) • Push for improved grading / quality improvement of establishments • Identify key beach activity nodes & facilitate development of experience & activities at these nodes

5.2.6 HERITAGE TOURISM

The table below shows the two strategic thrusts for the Heritage experience with the main action plans related to each strategic thrust.

Strategic Thrust	Heritage Tourism Action Plans
Ensure superlative draw card experiences related to heritage are offered	<ul style="list-style-type: none"> • Implement the Zulu Heritage Route Plan. Include consideration of a major iconic statue of King Shaka. • Must see struggle / freedom route attraction / experience (medium term) • Must see San people's attraction / experience (long term)
Integrate Heritage within / across core experiences	<ul style="list-style-type: none"> • Provide quality heritage experiences in and close to Durban • Provide quality heritage experiences in and close to the main scenic areas • Take battlefields experiences into mainstream desirable general interest experience Incorporate heritage & cultural emphasis into all product development and services



5.2.7 SCENIC TOURISM

The Table below indicates the two sub-thrusts for Scenic Tourism and the main action plans to attain the strategic goals.

Strategic Thrust	Scenic Tourism Action Plans
<p>Enhance iconic natural scenic tourism experiences (Ukhahlamba / Drakensberg WHS) 2nd priority iSimangaliso</p>	<ul style="list-style-type: none"> • World class interpretation and visitor centre for Ukhahlamba / Drakensberg • Marketing of the Drakensberg area and iconic views • Implementation of the Maloti Drakensberg WHS Tourism Development Plan • Zonation & node identification for product development • Enhance the WHS scenic experience – scenic drives / view sites, consider cable car access to summit • N3 gateway project • Investment by prestigious brands / hotels at Tendele and Royal Natal • Develop a scenic tourism strategy for iSimangaliso/far north coast area
<p>Enhance general scenic experiences throughout KZN</p>	<ul style="list-style-type: none"> • Integrated and consistent development policies / management plans • Ensure spatial controls to preserve and improve views and allow for controlled development only • Scenic drive development promotion and standards – scenic drives of various length, from various key points are well mapped and promoted and have appropriate signage and viewpoints / stops

5.2.8 WILDLIFE TOURISM

The objective is that KZN wildlife experiences are highly-rated and sought-after with Unique Selling Points related to the marine element, Rhinos, and the oldest (home of conservation) conservation area.

Strategic Thrust	Wildlife Tourism Action Plans
<p>Focus and Enhance the KZN Wildlife Experience (iSimangaliso WHS / Lubombo TFCA / Elephant Coast)</p>	<ul style="list-style-type: none"> • Alignment, integration and interaction between Lubombo TFCA, Elephant Coast and isiMangaliso Tourism Development Plans • Branded product development in iSimangaliso and around Hluhluwe-Imfolozi • Wildlife experiences close to Durban – safari parks • Wildlife / Coastal Accommodation supply development • Improve marine wildlife experiences and dive sites

5.2.9 RURAL TOURISM

Strategic Thrust	Rural Tourism Action Plans
<p>Focus and Enhance the Rural Tourism Experience</p>	<ul style="list-style-type: none"> • Alignment, integration and interaction with the National Rural Strategy and develop an overall rural tourism strategy for KZN and also investigate the homestay concept. • Build institutional capacity for rural tourism planning and development at provincial and local levels (aligning with National) • Develop and promote new itineraries in rural areas with high tourism potential • Training and Capacity Building initiatives for identified areas with tourism potential • Identify pilot projects and implement

5.2.10 NICHE TOURISM

The following tables list each of the sub-thrusts under the first Niche tourism strategies and the key action plans for implementation. Detail of the action plans for the other niche tourism experiences are provided in the main report.

Strategic Thrust	Niche Tourism Action Plans
<p>Cruise Tourism Strategy</p>	<ul style="list-style-type: none"> • Identify types and standards of new business tourism facilities required in priority areas • Review, finalise and implement Durban KZN Convention Bureau Business Plan • Comprehensive sports and events strategies for KZN • Assess and address standard of key facilities to ensure Durban remains world class business tourism destination • Establish a provincial bid fund



Other Niches	Niche Tourism Action Plans
<ul style="list-style-type: none"> - Heritage niches - Avi-tourism - Adventure - Diving - Rail - Hunting - Health - Shopping - Pink tourism - Agri-tourism - Mission tourism 	<ul style="list-style-type: none"> • Investigate the potential of the Niches within KZN with specific relevance to potential market segments.

5.2.11 TOURISM ACCESSIBILITY STRATEGY

Each access strategic thrust is covered in the tables below along with the relevant action steps.

Strategic Thrust	Airlift Tourism Action Plans
<p>Airlift Tourism Strategy</p>	<ul style="list-style-type: none"> • Review Airlift Support Programme to determine KZN Airlift Policies with regards to KSIA; airline incentives; marketing support; subsidies and passenger level guarantees • Engage with National Department of Transport and ACSA with objective of determining ACSA's role in assisting with and contributing to the macro-economic aspects of tourism in KZN

Strategic Thrust	Action Plans
Public Transportation / Intermodal Transport	<ul style="list-style-type: none"> • Tourism public transport strategy / plan for Durban
Other Transport Access and Gateways	<ul style="list-style-type: none"> • Facilitate road transport access through appropriate road infrastructure • Investigate rail access to the province and develop a rail access strategy • Develop key gateway facilities at major road access points i.e. N3, N11, N2 x2, R22.
Tourism Infrastructural Strategy	<ul style="list-style-type: none"> • Road maintenance - address specific areas requiring maintenance related to experience development • Review & Implement tourism and interpretative signage strategy for KZN • Provincial and municipal partnering regarding Bulk Services capacity for KZN tourism priority areas • Develop and implement a tourism information provision framework

5.2.12 SUPPORT STRATEGIES

The various tourism development and planning support strategies are outlined in the table below, by strategic thrust and indicating the key action steps recommended.

Strategic Thrust	Action Plans
Universal Accessibility Strategy	<ul style="list-style-type: none"> • Provide training of Tourism Information Officers and other front line staff • Establish a "KZN Disabled Tourism Association" - enable involvement of visitors with disabilities in the development, promotion and monitoring of accessible tourism. • Develop website, brochures, as well as a database of accessible tourism facilities • Encourage Tour Operator involvement in engaging with this target market



Strategic Thrust	Action Plans
Tourism Projects Bulk Services Support Programme	<ul style="list-style-type: none"> • Review Key Tourism Projects' locations & conduct assessment on current status of bulk services • Municipalities to develop coordinated infrastructural strategy for tourism • Liaison with Local Government to determine support requirements
Investment Promotion Strategy	<ul style="list-style-type: none"> • Review the Push and Pull and identifying means to ensure investors awareness and confidence in investing in the province tourism offering • Review and analyse government incentives schemes necessary for tourism investment • Determine and refine policies for national and provincial tourism investment incentives • Roll out the investment strategy according to KZN iconic offerings as key tourism products with the potential of providing commercial investment opportunities for either local or foreign investors, i.e. 1) Drakensberg cable car, 2) Breakwater / monument / statue, 3) the Bluff Bridge, and 4) King Shaka Statue, 4) Iconic Wildlife Tourism Offering – North Eastern part of KZN, and 6) KZN Zulu Cultural Heritage Route
Tourism Safety and Security	<ul style="list-style-type: none"> • Review, adopt and implement the final KZN Tourism Safety and Awareness Strategy
Tourism Planning Framework Strategy	<ul style="list-style-type: none"> • Facilitate fast tracking of planning processes as well as land auditing to enable development to occur • Identify bureaucratic challenges and address • Help desk to handle queries and complaints on approval processes • Develop a prioritisation system with criteria to identify priority projects for planning and implementation
Tourism Funding Support	<ul style="list-style-type: none"> • Set up an independent Tourism Development Fund or dedicated tourism fund within an existing provincial funding entity with funding for projects, SMMEs, communities and infrastructure • Ensure coordination and lack of duplication between existing tourism support funding entities and funds e.g. NDT SRI, COGTA Development Fund, IDC, DTI, TSP, KZN Growth Fund, Ithala, • Ensure that funding is available for local municipalities for tourism and infrastructure, including tapping into the new national comprehensive local government support programme
Tourism Route Coordination and Development	<ul style="list-style-type: none"> • Develop a comprehensive Tourism Route strategy for the province, including provincial accreditation

5.2.13 ICONIC PROJECTS

The Province will consider developing iconic “signature” projects, i.e. catalytic projects that will make a significant visual and perception impact, that will be iconic for all KZN’s markets, as well as enhance the product and experience related to the core experiences. The recommended possible iconic projects for the province are:

Drakensberg cable car	The true scenic beauty and majesty of the Drakensberg is only appreciated from the top of the mountain range and is currently only accessible to serious hikers. A cable car experience with mountain top facilities and interpretation will be an immense attraction for local and foreign markets.
Breakwater/monument/statue	The lack of gentle sea beaches is a negative issue; a breakwater, similar to port breakwaters, could be an offshore monument that provides a major visual impact from land and air.
Bluff bridge	An iconic and unusual bridge could be built to connect the Bluff with the Point development. This makes a worldwide statement about the progressive city, cements the Point development, and provides improved land and property values for the Bluff.
King Shaka Statue	An iconic statue of significant size, that incorporates visitor facilities and experiences, as well as the normal support elements of restaurants, venues, retail etc., as part of the iconic Zulu Heritage experience.
New International Convention Centre	A convention centre with astounding architecture in the North Coast.
Beach Resort	The development of a world class beach resort will ensure product diversification, enhance visitor experience, increase visitor numbers, increase job opportunities, enhance KZN’s competitiveness, develop KZN as a unique and must see destination.
Isandlwana Development Precinct	An area of special historic and heritage importance, depicting Zulu architectural design. The Isandlwana development precinct is envisaged to encompass a variety of visitor amenities such as museum with an interpretation centre, art and curio shops and promoting the Zulu experience the province is renowned for.



5.3 CLUSTER THREE: PEOPLE IN TOURISM - HUMAN RESOURCE DEVELOPMENT & SERVICE EXCELLENCE STRATEGIC PLAN

This strategic cluster relates to the development of human capital within the tourism sector as well as the need to entrench a culture of service excellence within the industry. Four key strategic thrusts have been identified:

- People development
- Transformation
- Tourism awareness & understanding
- Quality experiences & service excellence

Each of four key strategic thrusts' objectives are detailed below with the main action steps. The objectives for the people development thrust are to improve service levels aligned to core tourism experiences and industry needs, improve HR capacity for tourism management in KZN and to ensure that tourism and hospitality jobs are seen as a career of choice and importance in KZN

Strategic Thrust	People Development Action Plans
<p>Airlift Tourism Strategy</p>	<ul style="list-style-type: none"> • Baseline provincial tourism & hospitality skills audit • Create a platform for industry & training institutions to engage • Identify required & scarce skill and promote delivery of relevant courses • Improve tourism & hospitality career choice perception & career information for school learners • THETA (CATHSSETA) sector skills plan implementation • Accredited/recognise tourism/hospitality training centres of excellence, ensuring they meet best practice & key standards • Stimulate master's and doctoral students and research through key bursaries • Stimulate career progression through supervisory & manager programmes and mentorship • Create a one-stop platform where the potential industry entrant can learn about available careers, courses & training & possible placements • Capacity building programmes for Municipalities, CTOs & industry associations

The Transformation objectives are to increase the levels of disadvantaged individuals in ownership and management across all types and sizes of tourism business, improve the benefits of tourism to disadvantaged individuals and to improve compliance with tourism sector BEE codes.

Strategic Thrust	Transformation Action Plans
Transformation	<ul style="list-style-type: none"> • Baseline study on state of tourism transformation in KZN • Finalise KZN Tourism Transformation Plan • Integrated & comprehensive business support programme – include mentorships, incubators, access to funding, & understanding of product opportunities • Integrate with funding and support programmes that can assist previously disadvantaged individuals • Ensure that PPP and concession opportunities are structured to make SMME opportunities available to previously disadvantaged individuals • Promotion & sponsorship of disadvantaged individuals on management development/career development programmes • Promote compliance with Tourism B-BBEE Sector Code

The objectives of the tourism awareness and understanding strategic thrust are to improve recognition of the tourism sector as an important economic contributor, improve the general understanding of what tourism is, and improve attitudes towards providing for the needs of visitors.

Strategic Thrust	Transformation Action Plans
Tourism Awareness & Understanding	<ul style="list-style-type: none"> • Explaining, lobbying & prioritising the tourism industry with politicians & government officials • Promote tourism awareness & understanding amongst all KZN residents, including learners in schools and the media

The objectives of the quality experiences and service excellence strategic thrust are to Improve product quality and aim for KZN to have the highest provincial penetration of graded products, to improve people skills and attitudes and thereby offer improved service, and to create legendary, culturally based, service levels in KZN

The aim therefore is for every visitor to leave their KZN destination thinking about the incredible service excellence values they have experienced at every touch point in the province during their visit. These values are warm, welcoming & hospitable, sharing & generous, and respect.



The main action steps in the quality experiences and service excellence strategic thrust are shown in the table below.

Strategic Thrust	Quality Experiences Action Plans
Quality Experiences & Service Excellence	<ul style="list-style-type: none"> • Implement the national Service Excellence Initiative including SABS standards • Promote the formal grading of establishments & operations • Develop a recognition & motivational project to acknowledge KZN service excellence icons • Establish a nuanced & accessible customer feedback system • Develop/fine tune & promote a consistent & coordinated programme for client facing personnel • Develop & run regular media projects/campaigns to highlight & profile service excellence • Run an Industry awards programme for service & product excellence

5.4 CLUSTER FOUR: MARKETING

5.4.1 MARKETING OBJECTIVES

The primary objective is to grow visitor numbers to KZN. Thereafter a number of sub-objectives indicate the series of actions and activities that will be undertaken to achieve the over-arching objective. These sub-objectives are shown in the table below.

Objective: Grow visitor numbers by.....
<ul style="list-style-type: none"> • Identification & prioritisation of appropriate market segments - find the ideal balance between deeper penetration or maintenance of existing markets vs. development of new markets
<ul style="list-style-type: none"> • Attaching targets to each marketing activity and monitoring the success of activities against their targets (“measure, measure, measure!”)
<ul style="list-style-type: none"> • Ensuring all provincial organisations live the brand (not just TKZN) thus expanding marketing reach through usage of multiple marketing budgets
<ul style="list-style-type: none"> • Continuous and extensive communication to industry stakeholders of marketing activities – thus increasing the number of players in the industry committing to marketing activities that are aligned to TKZN activities and expanding marketing reach through investment of multiple marketing budgets
<ul style="list-style-type: none"> • Continuous research to understand target segment needs and experiences wanted as well as support multiple marketing activities but always linked to specific market segments and targets. Research includes monitoring of success of activities and other industry player activities
<ul style="list-style-type: none"> • Connecting marketing to product development by way of target segment needs research and identification

The marketing cluster is underpinned by three strategic thrust, namely

- Aligned & integrated provincial tourism branding & positioning
- Prioritised & experience based market segmentation
- Market distribution

<p>Aligned and Integrated Provincial tourism branding and positioning</p>	<ul style="list-style-type: none"> • Alignment of Provincial branding with National tourism branding • Enhance new Provincial branding and positioning to be core experience based • Expand new provincial branding and positioning by specifying key supporting or niche experience • Strongly align regional area (district/local areas) use of branding and position to Provincial branding and positioning • Encourage the use of Provincial branding by private sector • Identify potential for long term expansion and development of visitor experiences
<p>Prioritised & experience based market segmentation</p>	<ul style="list-style-type: none"> • Develop recommended market segmentation grid • Develop targets for recommended market segments • Recommend the positioning per core experience market segment
<p>Market distribution</p>	<ul style="list-style-type: none"> • Broad recommendations for marketing tools • Broad recommendations to marketing channels to support the experience segmentation approach • Broad recommendations for tourism packaging, i.e. routes support the experience segmentation approach

5.4.2 MARKETING STRATEGY

The marketing strategy is underpinned by the need to grow demand through aligned and integrated provincial tourism branding and positioning. This has to apply to all levels of the public sector and the private sector. The recently developed national branding framework adopted by the Province, and applied at provincial level and below both facilitates and presumes this. It also presumes, and we recommend is stressed and implemented as far as is possible, that the branding extends to all products and services originating within the province to perpetually re-enforce the provincial brand.



5.4.3 OVERALL STRATEGIC THRUST: ALIGNED AND INTEGRATED PROVINCIAL TOURISM BRANDING AND POSITIONING

The first strategic thrust under marketing is therefore aligned and integrated provincial tourism branding and positioning, and the overall direction this is taking is to move to experiential branding.

Strategic Thrust	Sub-Thrust / Action
<p>Aligned and Integrated Provincial tourism branding and positioning</p>	<ul style="list-style-type: none"> • Alignment of Provincial branding with National tourism branding • Enhance new Provincial branding and positioning to be core experience based • Expand new provincial branding and positioning by specifying key supporting or niche experience • Strongly align regional area (district/local areas) use of branding and position to Provincial branding and positioning • Encourage the use of Provincial branding by private sector • Identify potential for long term expansion and development of visitor experiences

The following examples indicate the agreed upon provincial brand and provide examples of the application of the strategic thrust of integrated and aligned branding and positioning, with experience led branding.



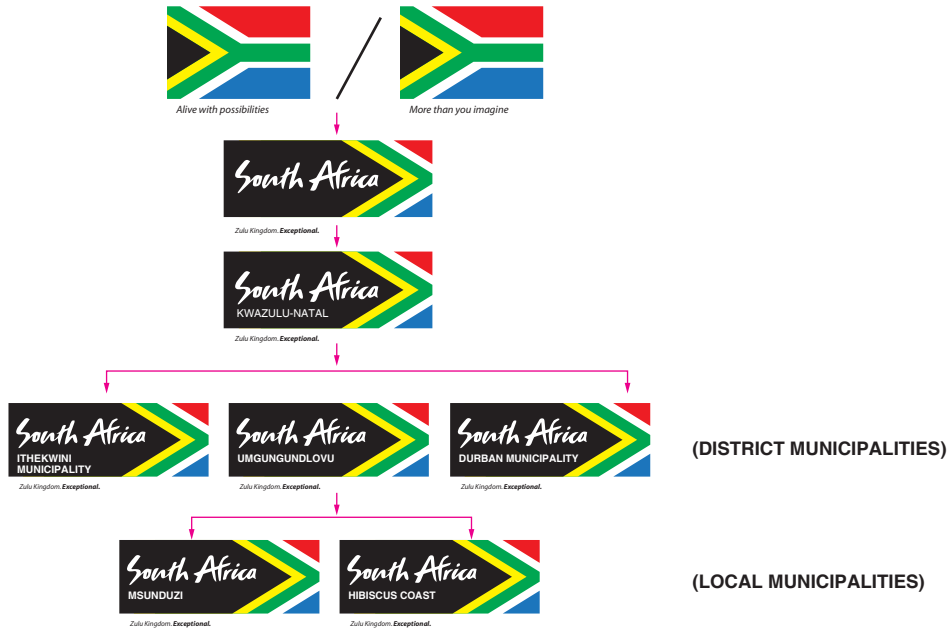
Zulu Kingdom. Exceptional.

The following is an example of how the provincial branding is used within the context of national branding but allowing for uniqueness in the KZN brand to be established: This utilises the new KZN tourism branding which is aligned to the national branding but continues to look for ways to differentiate, i.e. tagline or experience statements, or use of colour & fonts on the rest of page. The National logo is in effect a small portion of the brand look and feel. This is further demonstrated in the examples on the following pages.

Regional and local branding and positioning:

Other “geographic areas, below the provincial level have the option of using the provincial SA brand, or using any other geographic nomenclature within the SA brand icon. So Durban, eThekweni, or Hibiscus coast are all possible.

5.4.4 BRANDING & POSITIONING – EXAMPLES OF APPLICATION OF STRATEGIC THRUST RECOMMENDATIONS AT REGIONAL LEVEL





However, for all provincial level material, and preferable other level marketing material, we suggest that the KZN tourism branding is used at regional level, with no separate regional branding, or limited regional branding is 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 examples below.

5.4.5 OVERALL STRATEGIC THRUST: PRIORITISED & EXPERIENCE BASED MARKET SEGMENTATION

Strategic Thrust	Sub-Thrust / Action
<p>Prioritised & experience based market segmentation</p>	<ul style="list-style-type: none"> • Develop recommended market segmentation grid • Develop targets for recommended market segments • Recommend the positioning per core experience market segment

Core experiences are either unique to the destination or significantly different from a similar experience in a competitive destination. Therefore the question is posed as to what makes KZN core experiences core? The three main core experiences are unique or significantly different because:

1. The KZN "Beach" experience is better and different to the beach experience in the Western Cape because it's warmer and unique because it's closer to quality wildlife and further different because it is underpinned by the unique Zulu culture. There are also competitive African beach destinations, but the KZN beach experience should surpass these on two dimensions, viz; size and scale of the market due to the major domestic market, which is limited in the other African destinations, and the chic modern, "Beach City" aspect of Durban with its related sophisticated shopping and entertainment, and other activities and attractions. Zanzibar, Mombasa and Mozambique cannot compete on these dimensions.

2. The KZN "Scenic/natural beauty/mountains" experience is better because it is green all year round, it is easily accessible, and it is different because it is underpinned by the unique Zulu and San cultures. It offers spectacular mountains and mountain views, and many activities which no other area in South Africa offers.

3. The KZN “Wildlife” experience is unique because it combines land and marine wildlife and it is better because it’s green all year round, combines with significant scenic beauty and different because it is underpinned by the unique Zulu culture.

Supporting or niche experiences are often also found in competitive destinations and are of good quality but not significantly better/unique. Core experiences attract and appeal to large markets, whereas niche or supporting experiences add to the richness of a destination by providing regular (e.g. shopping, nightlife, adventure) or unique (e.g. missions, battlefields, heritage) additional experiences to support and enhance the core experience. Supporting experiences often underpin or strengthen or differentiate the core experience.

Within the aligned and integrated provincial tourism branding and positioning, there are six sub-thrusts namely:

- Alignment of Provincial Branding with National Tourism Branding
- Enhance “New” Provincial Branding & Positioning to be Core Experience Based
- Expand “New” Provincial Branding & Positioning by specifying Key Supporting or Niche Experiences
- Expand “New” Provincial Branding & Positioning by specifying Key Supporting or Niche Experiences
- Strongly align Regional Area (District / Local areas) use of Branding & Positioning to Provincial Branding & Positioning
- Encourage the use of Provincial tourism branding by Private Sector

Key action plans for each of these is detailed in the TMP and further detailed in the implementation plans.

5.4.6 PROVINCIAL BRANDING AND POSITIONING

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



Zulu Kingdom. Exceptional.

Other “geographic areas, below the provincial level have the option of using the provincial SA brand, or using any other geographic nomenclature within the SA brand icon. So Durban, eThekweni, or Hibiscus coast are all possible.

“Building an economy that creates opportunities for all and making tourism to work for us All”



5.4.7 TARGETS FOR RECOMMENDED MARKET SEGMENTS

This strategic thrust has four sub-thrusts viz

- Develop Recommended Market Segmentation Grid
- Develop Targets for Recommended Market Segments
- Recommend the Positioning per Core Experience Market Segment
- Broad Recommendations for Marketing

The primary direction for this strategic thrust is “approaching market segmentation first on the basis of the experience sought, rather than geographic source market.

The following three target market matrix grids show the provisionally realigned, prioritized target markets with the market focus identified, for each of the core experiences.

The next step in the marketing strategy involves setting target by core experience and geographic source markets, linked to overall arrivals growth objectives. Further research is required to be able to establish better baselines for this approach and will be part of the implementation process. This targets setting will also include developing targets for the niche experiences.

Core Experiences	Market	Geographic Scope			Target Segments
1. Beach	Domestic	<u>Core:</u> 1. KZN 2. Gauteng	<u>Opportunity:</u> 1. Eastern Cape 2. Western Cape	<u>Investment:</u> 1. North West 2. Limpopo 3. Free State 4. Mpumalanga	2. Independent couples & families 3. Young & upcoming 4. Well-off homely couples 5. MICE 6. Basic needs older families (for intra KZN day travel & Inter KZN VFR day travel) – social tourism

Core Experiences	Market	Geographic Scope			Target Segments
	SADC Rest of Africa & Indian Ocean Islands	Core: 1. Botswana 2. Lesotho 3. Swaziland	Opportunity: 1. Zimbabwe 2. Zambia		3. Beach Lovers (Families) 4. MICE
	Europe Americas Asia	Primary Core: UK	Secondary Core: 1. Germany 2. France 3. Netherlands	Investment: 1. Scandinavia 2. Russia 3. Rest of Eastern Europe	4. New Beach Lovers 5. NSSA 6. Wanderlusters 7. Family explorers

Core Experiences	Market	Geographic Scope			Target Segments
2. Scenic / Natural Beauty / Mountains	Domestic	Core: 1. Gauteng 2. KZN	Opportunity:	Investment: 1. North West 2. Free State	2. Independent couples & families 3. Young & upcoming 4. Well-off homely couples 5. MICE
	SADC Rest of Africa & Indian Ocean Islands Europe	KZN has similar attributes to the markets and are therefore excluded			
	Americas Asia	Primary Core: 1. UK	Secondary Core: 1. Germany 2. USA 3. France 4. Netherlands	Investment: 1. Scandinavia 2. India 3. China 4. Russia 5. Rest of Eastern Europe	Strategy Hub: • Middle East



Core Experiences	Market	Geographic Scope			Target Segments
3. Wildlife	Domestic	Core: 1. Gauteng 2. KZN	Opportunity: 1. Western Cape 2. Eastern Cape	Investment: 1. Free State	2. Independent couples & families 3. Young & upcoming 4. Well-off homely couples
	Europe Americas Asia	Primary Core: 1. UK	Secondary Core: <ul style="list-style-type: none"> • Germany • USA • France • Netherlands 	Investment: 1. Scandinavia 2. India 3. China 4. Russia 5. Rest of Eastern Europe	Strategy Hub: <ul style="list-style-type: none"> • Middle East 1. NSSA 2. Wanderlusters 3. Family explorers
	SADC Rest of Africa & Indian Ocean Islands	n/a <div style="border: 1px solid black; padding: 5px; display: inline-block;"> KZN has similar attributes to the markets and are therefore excluded </div>			

5.4.8 OVERALL STRATEGIC THRUST: MARKET DISTRIBUTION

Strategic Thrust	Sub-Thrust / Action
Market distribution	<ul style="list-style-type: none"> • Broad recommendations for marketing tools • Broad recommendations to marketing channels to support the experience segmentation approach • Broad recommendations for tourism packaging, i.e. routes support the experience segmentation approach

The grid shows that most markets require penetration or development therefore improving market share in existing target markets before looking at new markets is a key tenet of the marketing strategy. The majority of resources/activities should therefore be focused on further penetration of existing markets or expanding into new experience segments in existing geographic source markets.

Market	Geographic Scope			
Priority 1: Domestic	Core: 1. KZN (SA – vs KZN -) 2. Gauteng	Opportunity: 1. Eastern Cape 2. Western Cape	Investment: 1. North West 2. Limpopo 3. Free State 4. Mpumalanga	
Priority 2: SADC Rest of Africa & Indian Ocean Islands	Core: 1. Botswana 2. Lesotho 3. Swaziland	Opportunity: 1. Zimbabwe 2. Zambia	Investment: 1. Mozambique 2. Nigeria 3. Kenya 4. Mauritius	
Priority 3: Europe Americas Asia	Primary Core: 1. UK	Secondary Core: <ul style="list-style-type: none"> • Germany • USA • France • Netherlands 	Investment: 1. Scandinavia 2. India 3. China 4. Russia 5. Rest of Eastern Europe	Strategy Hub: 1. Middle East (due to air access hub)



6. MAJOR KEY ACTIONS BY TERM

Years	1 - 3	3 - 8	8 - 13	13 - 18/19
Terms	2012 - 2014	2014-2019	2019-2024	2024- 2029/2030
Policy, Research, Monitoring, Management	Implement the Tourism Institutional structure with particular attention to communication and partnerships across the departments and levels within government and between governments and the private sector			
	Determine where the institutional capacity for which types of research will lie, and allocate research responsibilities and sufficient budget for comprehensive and regular research to support the tourism strategy			
	Plan for an update legislation to enable registration of tourism businesses	Implement registration of tourism businesses in the province and thereby ensure an accurate provincial tourism data base is maintained		
			Update and revise the KwaZulu-Natal Tourism Master Plan	

Years	1 - 3	3 - 8	8 - 13	13 - 18/19
Terms	2012 - 2014	2014-2019	2019-2024	2024- 2029/2030
Planning and development	A Tourism master plan and Strategy is developed for Ethekewini	Monitoring and Evaluation	Monitoring and Evaluation	Monitoring and Evaluation
	Completion of the Point Development			
	Re-instate Blue Flag, or another credible beach quality/ accreditation system on Durban beaches	Include other beaches outside Durban	Ongoing	Ongoing
	Iconic Developments - full investigation and planning for development, including feasibility studies, environmental and development planning authorisation	Develop Iconic Development 1 - Cable Car	Develop Iconic Development 2 - beach breakwater	Develop iconic Development - Durban Harbour Bridge
	Full node identification and master planning for new beach nodes carried out, including social tourism nodes in Durban and elsewhere on the coast	Start development of the first new beach tourism node and aim to have one recognised international branded beach resort in it	Complete development of the first beach tourism node.	Start development of the second new beach tourism node
	Develop first social tourism facility in Durban	Full investigation and planning for second social beach tourism facility development, including feasibility studies, environmental and development planning authorisation	Develop second social beach tourism facility outside Durban	Ongoing Monitoring
	Create and implement a Durban Beachfront Improvement District programme in partnership with the City and the Private sector	Facilitate the development of Durban beachfront entertainment shopping and restaurant nodes	Facilitate the development of further Durban beachfront entertainment shopping and restaurant nodes	Ongoing
	Commence implementation of the Zulu Heritage Route including the Royalty and King Shaka elements and an icon is attraction including a major statue	Finalise the Zulu Heritage Route and Iconic visitor attraction	Develop a major San interpretation centre and experience, linked to/with an Ukhahlamba Official WHS visitor centre	
		Implement a first class liberation and struggle attraction and route, around Durban		
	Achieve a true partnership with Ezemvelo and Isimangaliso, the private game reserves and the relevant municipalities to develop [and market] the wildlife experience	Monitor and Evaluate	Review the Agreement	Monitor and Evaluate
	Plan for the upgrade/extension of the Durban Exhibition Centre and ICC	Implement the upgrade and extension of the Durban Exhibition Centre and ICC	Conduct Economic Impact Study	Conduct Economic Impact Study



Years	1 - 3	3 - 8	8 - 13	13 - 18/19
Terms	2012 - 2014	2014-2019	2019-2024	2024- 2029/2030
Planning and development cont.	Develop and implement, with substantial budget support, a sports and events strategy for the Province	Bid for and win the rights to host one major world sporting event	Host one Major world sporting event	Bid for and win the rights to host one major world sporting event
	Commence development of the Durban Cruise passenger terminal	Complete development of the Durban Cruise passenger terminal	Develop a Richards Bay Cruise passenger terminal	Ongoing
	Devise and acquire funding for, a major airlift support programme	Implement the airlift support programme, linking bursts of support to the opening of facilities at new beach tourism nodes	Implement the airlift support programme, linking bursts of support to the opening of facilities at new beach tourism nodes	Implement the airlift support programme, linking bursts of support to the opening of facilities at new beach tourism nodes
	Implement a tourism public transport system for the greater Durban area, including inter-modal facilities and phases	Implement a tourism public transport system for the greater Durban area, including inter-modal facilities and phases	Ongoing	Ongoing
	Develop the N3 KwaZulu-Natal gateway	Develop 2 x N2 KwaZulu-Natal gateways	Develop the R22 KwaZulu-Natal gateway	
	Develop a comprehensive tourism signage strategy	Roll out the signage strategy	Review the Strategy	Ongoing
	Develop a comprehensive tourism information provision and tourism information centre strategy	Roll out the tourism information and centre strategy	Ongoing	Ongoing
	Set up a dedicated tourism fund to support SMMEs, infrastructure and key tourism projects, and ensure it has sufficient funds and harnesses funding from other sources where possible	Monitor the impact on service delivery	Ongoing	Ongoing
	Identify and support infrastructure development and tourism projects that support the tourism strategy	Identify and support infrastructure development and tourism projects that support the tourism strategy	Identify and support infrastructure development and tourism projects that support the tourism strategy	Identify and support infrastructure development and tourism projects that support the tourism strategy
	Identify and support SMME tourism projects that support the tourism strategy, with emphasis on rural tourism development	Identify and support SMME tourism projects that support the tourism strategy, with emphasis on rural tourism development	Identify and support SMME tourism projects that support the tourism strategy, with emphasis on rural tourism development	Identify and support SMME tourism projects that support the tourism strategy, with emphasis on rural tourism development
	Develop a co-ordinated tourism route strategy for the province	Implement the route strategy	Ongoing	Ongoing

Years	1 - 3	3 - 8	8 - 13	13 - 18/19
Terms	2012 - 2014	2014-2019	2019-2024	2024- 2029/2030
HRD and Service Excellence	Conduct a KZN tourism skills audit, tourism skills provision audit and gap assessment	Implement the plan	Conduct a KZN tourism skills audit, tourism skills provision audit and gap assessment	Ongoing
	Create and facilitate on an ongoing basis a forum for training providers and industry to interact	Ongoing	Ongoing	Ongoing
	Identify and accredit Tourism Centres of Excellence - accredited tourism training institutions that are quality controlled	Ongoing	Ongoing	Ongoing
	Review and then plan for improvement/changes, the tourism and hospitality subjects in school and career guidance	Ongoing	Ongoing	Ongoing
	Create a "one-stop-shop" where all learners and students can access accurate information on education, training, careers and where jobs in the industry are listed and candidates can list their availability	Maintain and Sustain		
	Develop and implement major training and capacity building programmes for municipal officials and CTO/LTA officials and staff	Ongoing	Review progress	Review progress
	Baseline study and finalisation of a transformation plan for KZN tourism	Implement, with significant resources, the transformation plan, including SMME and business support	Review the plan	Review the plan
	Develop and implement a campaign to stimulate a culture of travel amongst previously disadvantaged South Africans, including promoting tourism awareness and understanding	Ongoing	Ongoing	Ongoing
	Identify and support infrastructure development and tourism projects that support the tourism strategy	Identify and support infrastructure development and tourism projects that support the tourism strategy	Identify and support infrastructure development and tourism projects that support the tourism strategy	Identify and support infrastructure development and tourism projects that support the tourism strategy
	Follow/push for implementation of the national service excellence initiative, linked to SABS standards and with specific KZN implementation initiatives and service feedback systems	Ongoing	Ongoing	Ongoing
	Develop a co-ordinated tourism route strategy for the province	Implement the route strategy		



Years	1 - 3	3 - 8	8 - 13	13 - 18/19
Terms	2012 - 2014	2014-2019	2019-2024	2024- 2029/2030
Marketing	Achieve brand alignment, provincial and municipal, and with the private sector	Ongoing Monitoring	Ongoing Monitoring	Ongoing Monitoring
	Achieve experiential brand usage at all levels and in all areas. Develop range of experiential visuals and tag lines and make available to the public and private sectors at all levels. Cover the 4 core experiences and the first tier niche experiences (i.e. cruise, MICE, adventure and key heritage - Zulu, Battlefields)	Refine and update experiential branding, and marketing and extend to all identified niche segments (other than future segments)	Review and refine if required, experiential branding and expand to future new niches	Ongoing
	Major research amongst local and international Tourists to understand and further develop the experiential marketing approach to ensure it is, and remains, relevant and accurate for market needs, and monitor the marketing strategy implementation	Repeat the research x 2	Repeat the research x 2	Repeat the research x 2
	Finalise and activate marketing by experience - including international, regional and domestic and cover targets, tools, distribution channels, packaging and routes and budget allocation	Monitor and Evaluate	Review progress	Ongoing
	Develop and implement a social marketing strategy, linking to national where appropriate and including demand or supply subsidisation, and savings schemes/cards etc.	Implement	Ongoing	Ongoing
	Develop/create and implement (with a major launch and extensive communication budget) a brand for the Wildlife experience in KwaZulu-Natal, and support with familiarisations	Maintain the wildlife brand	Ongoing	Ongoing

Years	1 - 3	3 - 8	8 - 13	13 - 18/19
Terms	2012 - 2014	2014-2019	2019-2024	2024- 2029/2030
General	Achieve a significantly increased budget for tourism - R200 million, across the DEDT Dept and TKZN	Achieve a further substantial increase in the tourism budget to R300+ million, across the DEDT Dept and TKZN	Ongoing	Ongoing
	Ensure the department and TKZN are fully-staffed and competent to implement the strategies	Ongoing	Ongoing	Ongoing
	Achieve a true partnership, cooperation, regular meetings and joint vision for tourism [and events] with the City of Durban to jointly develop and market Durban, and thereby the province, for tourism.	Monitor progress	Ongoing	Ongoing

7. INSTITUTIONAL FRAMEWORK

7.1 PROVINCIAL LEVEL INSTITUTIONAL FRAMEWORK

The Institutional structure is the means by which strategy will be implemented and defines the roles of the various stakeholders in strategy implementation and governance. As structure follows strategy, and the strategy is clustered in 4 areas, viz Product Development and Planning, Policy, Strategy, Governance, Research & Knowledge and Monitoring, People and Marketing, strategic inputs and governance “forum” structures are proposed which mirror these four clusters.

Forums will ensure the relevant implementing entity(ies) are implementing strategies and actions, and provide guidance and strategic inputs. This function is akin to the function of a Board or a Portfolio committee for the relevant strategic tourism cluster interventions, programmes etc. The Forums must comprise limited numbers of mandated or senior people of good standing, who have appropriate expertise from relevant stakeholder groupings.

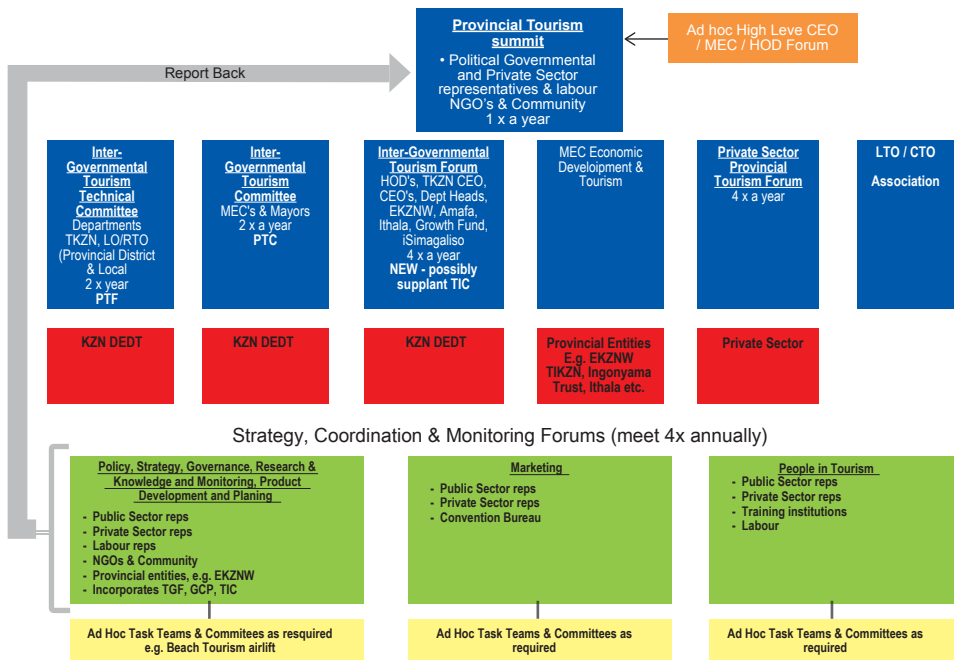
Existing committees are retained or re-allocated to respective forums based on the nature of their current agenda items.



Existing committees are retained or re-allocated to respective forums based on the nature of their current agenda items.

The proposed institutional structure is shown in the following figure.

7.2 PROVINCIAL LEVEL INSTITUTIONAL STRUCTURE



7.3 METRO, DISTRICT AND LOCAL LEVEL INSTITUTIONAL FRAMEWORK RECOMMENDATIONS

The above diagram depicts the institutional arrangements at a Provincial level. At the metro, district and local level, there is a degree of flexibility in some aspects of the institutional structure. However, the recommendation is that some aspects of the structure are non-negotiable at these levels and should be a requirement. These are:

- All municipal (district and local) and metros must have a departmental responsibility for tourism and a resource allocation to tourism. The department may be dedicated or a combination of tourism with other functions. The aligned functions are economic development related, and these should be where tourism combines or feeds into.
- Municipalities with a limited tourism industry or limited tourism potential may have a part-time tourism resource, i.e. a person who has tourism and other responsibilities, while those with significant tourism should have dedicated resources.
- All areas of the province should be covered by a Regional or Local Tourism Organization/Bureau/Community Tourism Organisation (RTO or LTO/LTB/CTO), i.e. no part of the province does not have an LTO/LTB/CTO or RTO within which it falls.

In any Metro or District Municipality there can be either an RTO or several LTOs (CTOs/LTBs) but each geographic areas should be covered by one or the other. Stronger local destinations will more likely be better served by LTOs and an RTO above the LTOs is duplication.

Each local 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. A district or metro may opt to fund multiple LTOs. However, there can be any number of LTAs or next level CTOs in a local area as the community and/or private determine, as long as they coordinate and associate in order to partner the public sector



The KZN Municipal effectiveness review lists 38 functions of municipalities. Of these, excluding the direct tourism function, 15 are considered to have a high relevance for tourism, and 12 medium relevance for tourism. Only 7 have no relevance for tourism.

This indicates why a dedicated approach to tourism is required at municipal level, as it is essential that the delivery of municipal functions take into account the needs of the tourism sector.

Within this context, the overall roles for local government in tourism are:

- 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 KwaZulu-Natal White Paper on the development and promotion of tourism clearly stipulates roles for DEDT and TKZN. The role of TKZN focuses on the destination marketing and support the development role handled by DEDT.

8. STRATEGY RISK FACTORS

Whereas the Tourism Master Plan provides for a clear direction for Tourism growth in the Province, just as with any development strategy effective implementation of the master plan is susceptible to certain risks identified as follows:

- Continuous insurgent of Brent Crude Oil Prices
- Global economic downturn
- Global currency exchange rate
- Natural disasters and climate change
- Political unrest and civic strife/prolonged and illegal industrial actions
- Crime and grime
- Incidents of intolerance, such as xenophobic attacks
- Outbreak and spread of infectious or communicable diseases
- A lack of commitment and support for the implementation of the Master Plan by key partner's including municipalities and private sector resulting in poor stakeholder coordination

It is of critical importance that all stakeholders should work together for an integrated and coordinated implementation of the strategy in order to deal effectively with these risk factors should they arise and maintain proper platforms for stakeholder engagements.

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9. MONITORING AND EVALUATION

The thrust aims to address the lack of monitoring & evaluation of tourism interventions in KZN. The responsibility of monitoring the implementation of the Master Plan lies with the Department to ensure the achievements of targets and tourism objectives as well as recommend measures to address any deviations. As such, the Tourism Component structure within the Department has to be reconfigured in line with the NDT with effect from 2013, Tourism Component shall be recognized as an independent stand-alone Programme within the Department. With the establishment of the Tourism Research, Policy and Planning sub-programme, the Department will be able to have dedicated personnel to monitor and evaluate the implementation of the strategy against set targets.



The Master Plan proposes Monitoring and Evaluation Action Plans as follows:

- Implement system of annual performance plans within government & relevant institutions
- Develop a research programme & impact assessments to monitor & measure the attainment of targets & objectives
- Assign responsibility for M&E at various levels of government

The strategy is to be regarded as a living document which is reviewed every five years, or as and when needed in order to align to new emerging trends and priorities.



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