



**dedt**

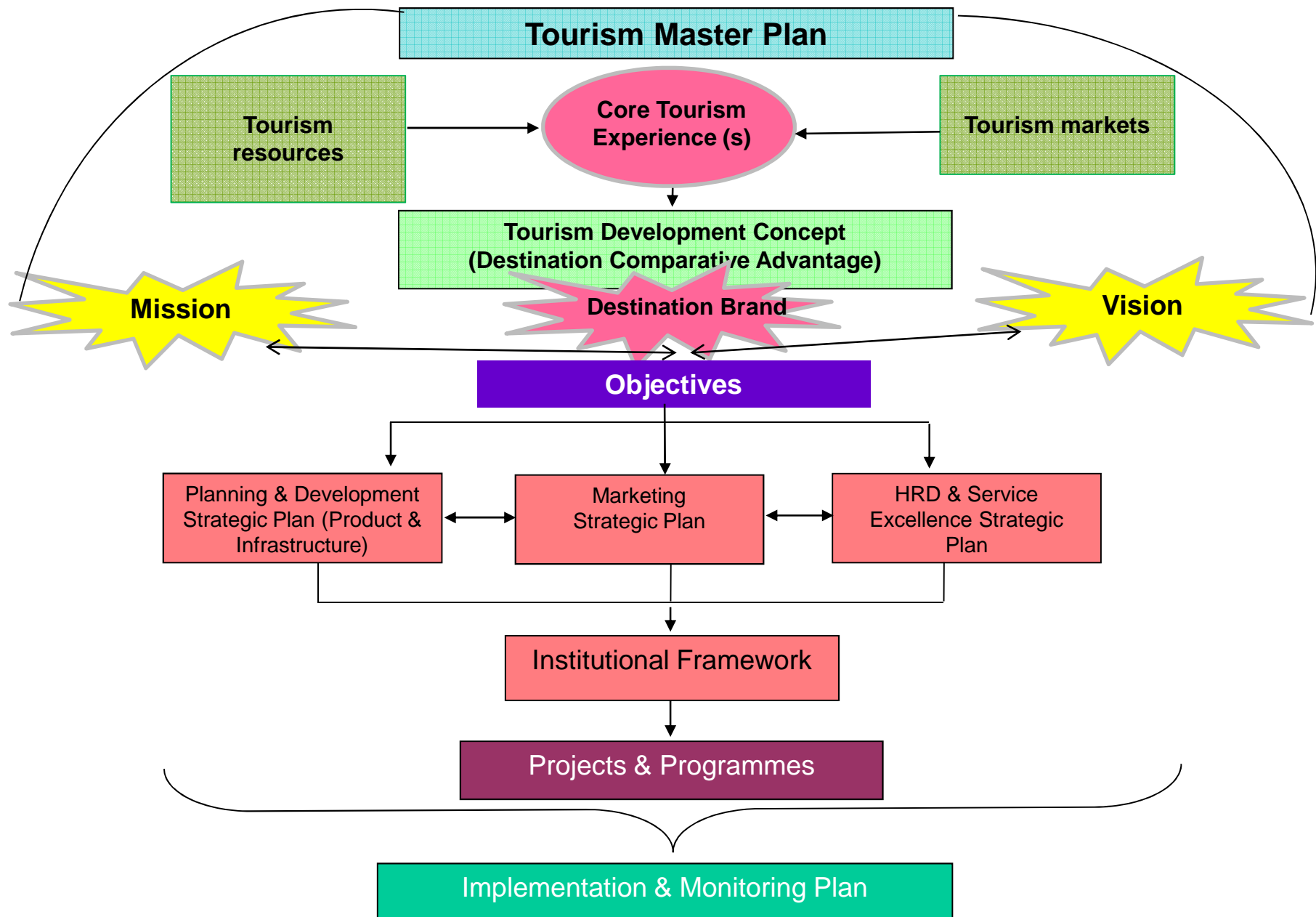
DEPARTMENT :

Economic Development & Tourism

**PROVINCE OF KWAZULU-NATAL**

# KwaZulu-Natal Tourism Master Plan

## Summarised Presentation



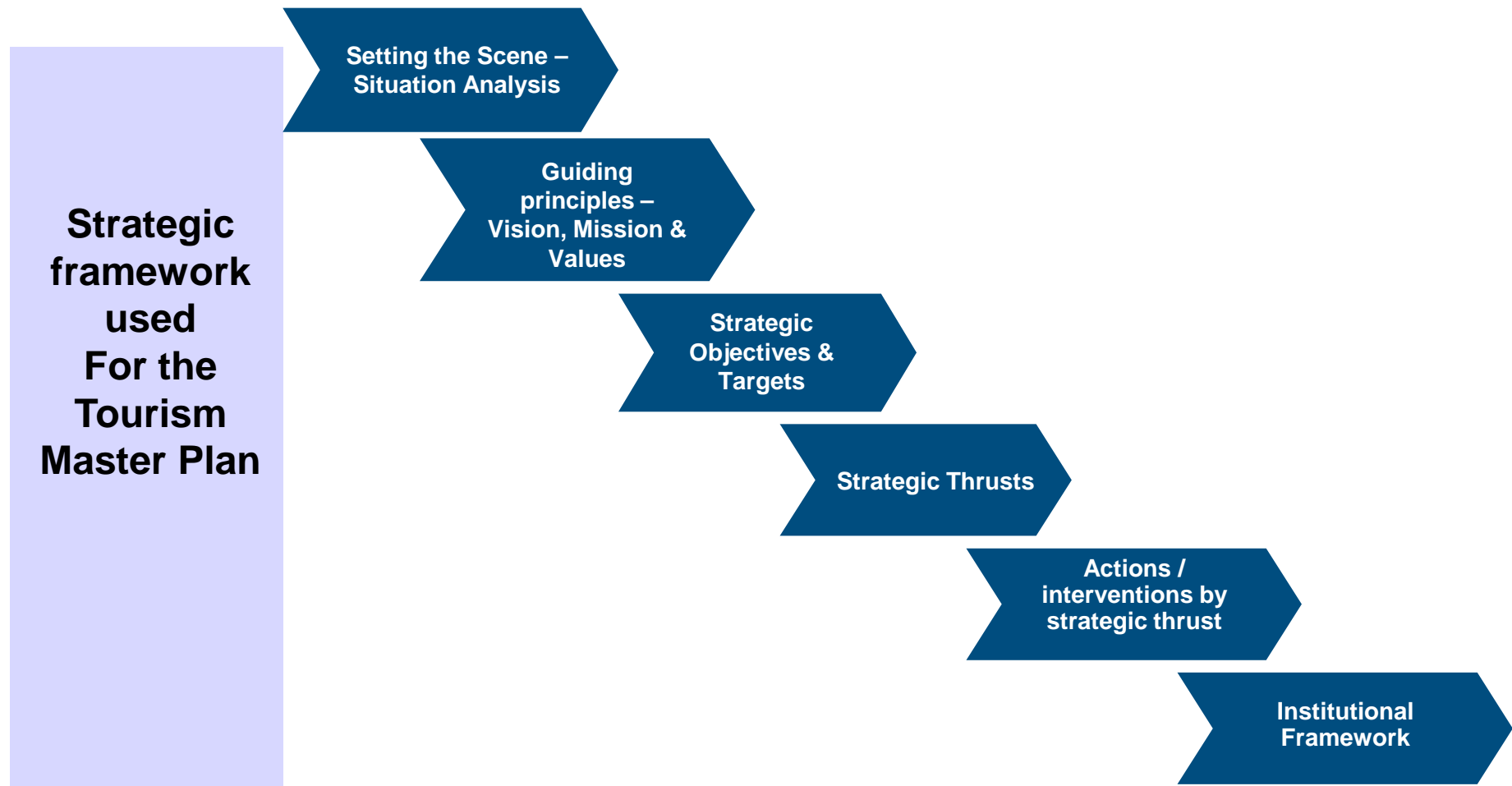
# KEY PARTNERS IN TOURISM GROWTH

- 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 Master Plan has been developed under these premises and each and every role player must play their role:



Introduction	Approach to Tourism Destination Planning	<b>Strategic Framework</b>	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
--------------	--	----------------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	---------------------------------------	---	---

# KwaZulu-Natal Tourism Master Plan



... strategic framework

# The KwaZulu-Natal Tourism Master Plan

## VISION

**By 2030 KwaZulu-Natal will be**

- globally renown
- as Africa's top beach destination
- with a unique blend of wildlife, scenic & heritage experiences
- for all visitors



**dedt**

DEPARTMENT :  
Economic Development & Tourism  
PROVINCE OF KWAZULU-NATAL

... guiding principles

# ETHOS

The purpose for the tourism industry in KZN is:

## ETHOS / PURPOSE

*Kuyisiko lethu ukuphatha kahle izivakashi zethu  
KwaZulu-Natal ngenhlonipho*

**It is our culture to treat all visitors  
within KwaZulu-Natal with respect**

- Using the culture to stress that we all respect all visitors
- Internalise and live a service culture, being friendly and hospitable – treating all visitors well



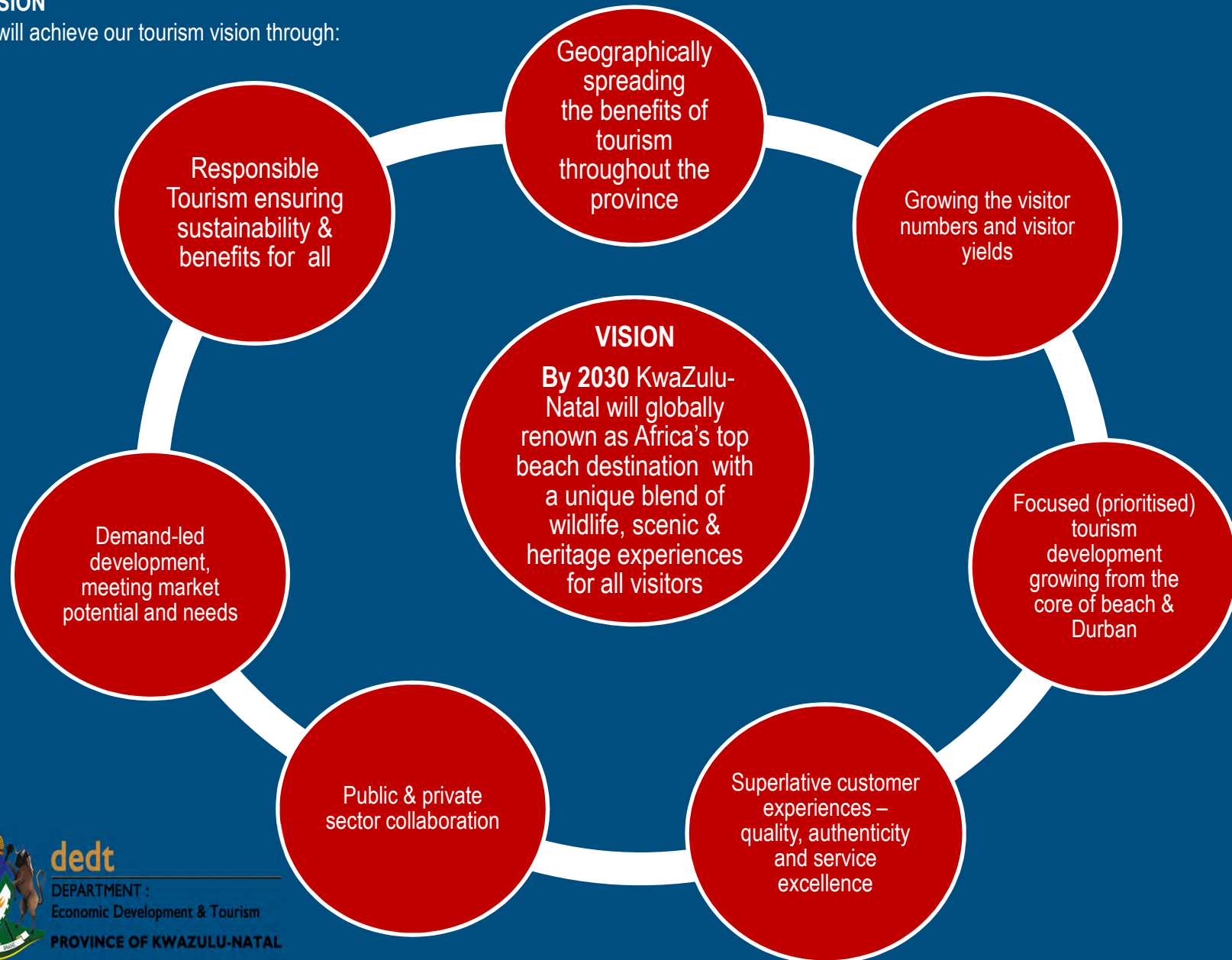
**dedt**

DEPARTMENT :  
Economic Development & Tourism  
PROVINCE OF KWAZULU-NATAL

... guiding principles

## MISSION

We will achieve our tourism vision through:



**dedt**

DEPARTMENT :  
Economic Development & Tourism

PROVINCE OF KWAZULU-NATAL

## OBJECTIVES & TARGETS

In order to achieve the vision, objectives will be set and targeted in each of the following areas:

- Increase the tourism GDP levels and tourism employment in the province;
- Grow the levels of all foreign visitor arrivals to the province;
- Grow the levels of domestic visitor arrivals to the province;
- Improve the geographic spread of tourism with 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 through out the province in all areas in which a visitor is serviced( i.e. beyond the recognized 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.

The key targets for the above objectives, based on 2009/2010 baseline data, are presented in the table below. In many instances only partial or no baseline data is available, and the detailed report indicates 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.



Introduction		Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
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"> <li>Based on the projected numbers and spend of domestic and international visitors</li> <li>The 8% increase as noted in 2009 was used for these projections</li> <li>Projections based on the proviso that there is no change in percentage increase through time</li> <li>Same implied multipliers as used by TKZN.</li> </ul>				
	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"> <li>Avg growth 2009 - 2020 <b>4,6%</b> - compared to NTSS 3,66% pa, 4,47% pa to 2030</li> <li>This is sum of inter-continental and African, ie all foreign.</li> <li>If NTSS objective attained, KZN share goes from 11,8%/12,3% to 13,8% 2020</li> </ul>				
	Inter-continental tourists	348 434	416 045	482 307	559 124	648 000	<ul style="list-style-type: none"> <li>Avg growth 2009 - 2020 <b>3.0%</b>, and same rate 2020 - 2030</li> <li>Projected annual growth rates of 5% - 6% post 2011,</li> <li>Total additional tourists 2011 – 2020: 94 680, 14 000 - 22 000 more pa</li> </ul>				
	African tourists	514 026	720 937	955 102	1 266 812	1,68 million	Avg growth 2009 - 2020 <b>5,8%</b> , 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"> <li>Avg growth 1.7% pa, taking account of decreases in 2010 and 2011</li> <li>KZN share of national grows from 29% to 30% by 2020</li> </ul>				
	Domestic holiday trips	3 168 000	3 221 856	3 281 000	3 448 364	3 660 507	<ul style="list-style-type: none"> <li>KZN maintains its 29% share;</li> <li>Average growth as per provincial strategy of 1% pa resumes after decline in 2010</li> </ul>				
	Domestic non-holiday trips	5 632 000	5 727 744	5 883 806	6 183 938	6 564 374	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					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	Growth resumes and continues at the same rate as domestic holiday, after 2010 decline				

Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
More detail	2009 base	2015	2020	2025	2030	Growth/change rationale				
Increase Employment	# of direct jobs supported by the sector	100 000	141 910	183 820	204 775	<ul style="list-style-type: none"> <li>•Based on the projected number and spend of domestic overnight tourists and international visitors, and using the same implied multipliers as used by TKZN.</li> <li>•Result is 111 480 more jobs</li> <li>•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</li> </ul>				
	# 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)

Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
--------------	--	---------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	---------------------------------------	---	---

Main Objectives		More detail	2009 base	2015	2020 target	2025 target	2030 target
Increase Geographical Spread	Increase tourist bednights spent in secondary and tertiary areas	Define secondary and tertiary areas for spread.	Develop baseline for bednights available and occupancy levels for identified areas	Develop targets once the baseline is established and monitor.	Monitor implementation of interventions	Monitor implementation of interventions	Monitor implementation of interventions
	Increase rural tourism	<ul style="list-style-type: none"> <li>Define rural tourism areas</li> <li>Increase the supply of rural tourism products that achieve acceptable Performance</li> </ul>	<ul style="list-style-type: none"> <li>Base line research needed</li> <li>Use business registration to develop a base line and track</li> </ul>	Develop targets once the baseline is established and monitor.			
Durban is THE PLACE to holiday	Increase number of day visitor and overnight tourists to Durban	<ul style="list-style-type: none"> <li>Increase accommodation occupancies in Durban</li> </ul>	<ul style="list-style-type: none"> <li>Durban 2010 hotel occupancies 56,6% (50,3% excl Jun/Jul); Jul <b>2011 ytd 56,8%</b> (STR).</li> <li>Baseline research and regular tracking required of occupancies (all accommodation types)</li> </ul>	<b>Hotel occupancies average 70%</b> 2015 - 2020 (similar to 2000 - 2007); Develop targets for other accommodation stock	<b>Hotel occupancies average 70%</b> 2015 - 2020 (similar to 2000 - 2007);	<b>Hotel occupancies average 80%</b> 2020 – 2025	<b>Hotel occupancies average 90%</b> 2025 – 2030
		<ul style="list-style-type: none"> <li>[then] Increase accommodation supply in the Durban area.</li> </ul>	Baseline research of total accommodation stock by type	Develop targets once the baseline is established	Develop new accommodation stock according to baseline	Maintain and upgrade existing accommodation stock	Maintain and upgrade existing accommodation stock
	Awareness and positiveness ratings of Durban	Durban known as attractive destination for SA and key International markets, particularly as a Beach destination	Brand tracking surveys to get to baseline (either SAT or own surveys)	Develop targets	Track brand awareness and implement appropriate interventions	Track brand awareness and implement appropriate interventions	Track brand awareness and implement appropriate interventions

Introduction		Approach to Tourism Destination Planning		Strategic Framework		Strategic Context Overview		Guiding Principles		Objectives & Targets		Summary of Strategic Thrusts		Marketing Strategic Plan		Planning & Development Strategic Plan		HRD & Service Excellence Strategic Plan		Policy Governance Research & Knowledge Management	
	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.		•Adapt /use National 's visitor satisfaction process		•Develop targets		Conduct annual visitor satisfaction surveys		Conduct annual visitor satisfaction surveys		Conduct annual visitor satisfaction surveys									
	Domestic Tourists			•Add overall and key element satisfaction ratings to all provincial research.		•Significant improvement over 5-years															
Transformation	Increase the number of tourism industry companies with Tourism Charter BBBEE ratings	Increase # of companies accredited and accredited at higher levels		•Include BBBEE certification and level in registration/product database.		•Implement recommendations of the baseline study		90% compliance with Tourism Sector Codes		100% compliance with Tourism Sector Codes		100% compliance with Tourism Sector Codes									
		Decrease # companies accredited at lower levels		•Review latest TECSA research (2011 release) for extent of this data on KZN, or develop own research and targets (2010-2012)		•50% compliance with Tourism Sector Codes															
		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		•Use updated 2011 TECSA base line r research  •2007 - overall industry score 52,4% of old Tourism Charter targets		•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		100% compliance with Tourism Sector								

Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
--------------	--	---------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	---------------------------------------	---	---

	Main Objectives	More detail	2009 base	2015 target	2020 target	2025 target	2030 target
Events and Mice Market Growth	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 <b>growth</b> - 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"> <li>World Cup in 2010</li> <li>One "Big" event every 10 years</li> <li>e.g. All Africa Games, Commonwealth Games, Olympic Games, CAF Cup etc</li> </ul>	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
	Increase the number of Meetings, Incentives, Conferenc es, and Exhibitions held in the Province	Increase the number of MICE events held in the province	Develop a provincial baseline (including monitoring the ICC separately)	<ul style="list-style-type: none"> <li>Develop targets based on growth of 3,5% pa.</li> <li>Possibly use the registration/product database for baseline and tracking</li> <li>work with the convention bureau &amp; ICC</li> </ul>	Develop a new International Convention Centre North of Durban / expand the existing Durban ICC	Continuously bid for big international event through Convention Bureau	Continuously bid for big international event through Convention Bureau
		Improve the Provincial ICCA ranking	<ul style="list-style-type: none"> <li>178th in 2010</li> <li>up from 231th in 2009</li> </ul>	<ul style="list-style-type: none"> <li>In top 120 by 2015</li> <li>Work with the convention bureau &amp; ICC</li> </ul>	<ul style="list-style-type: none"> <li>In top 100</li> <li>Work with the convention bureau &amp; ICC</li> </ul>	<ul style="list-style-type: none"> <li>In top 75</li> <li>Work with the convention bureau &amp; ICC</li> </ul>	<ul style="list-style-type: none"> <li>In top 50</li> <li>Work with the convention bureau &amp; ICC</li> </ul>
		Increase the number of Business Tourist visits to the province	<ul style="list-style-type: none"> <li>Measure the number of foreign and domestic business tourist visits for baseline</li> <li>SAT research to be unpacked if possible for foreign business</li> </ul>	<ul style="list-style-type: none"> <li>Similar or higher growth than for no. of events eg 3,5% pa or more</li> </ul>	3.5% increase in business tourism	3.5% increase in business tourism	3.5% increase in business tourism

Introduction		Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
	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	•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	•Durban- 150 pa by 2020 •Richards Bay-38 pa by 2020	•Durban- 200 pa by 2025 •Richards Bay-51 pa by 2020	•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	•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	Per baseline	Per baseline	Per baseline				
	Avi Tourism	Increase avitourists	Research to develop baseline s								
	Adventure Tourism	Increase hard/ pure adventure offerings	Research to develop baseline required - use product database/ registration								
		Increase adventure tourists	Research to develop baseline s								
	Rail Tourism	Increase rail tourism passengers									
	Hunting	Increase hunting visitors									



Strategy Cluster

Strategic Thrusts

1

Marketing –  
tourism growth &  
development  
(demand)

Aligned & integrated provincial tourism branding & positioning

Prioritised & experience based market segmentation

Market distribution

**Primary Objective: *Growth in Visitor Numbers***

Grow visitor numbers by .....

- Identification & prioritisation of appropriate market segments
- Attaching targets to each marketing activity and monitoring the success
- Ensuring all provincial organisations live the brand
- Continuous and extensive communication to industry stakeholders - commitment to marketing aligned to TKZN - leverage multiple marketing budgets
- Continuous research - understand target segment needs and experiences and to monitor success of activities
- Connecting marketing to product development by way of target segment needs research and identification

... summary of the strategic thrusts





Overall Strategic thrust

Aligned & Integrated Provincial Tourism Branding & Positioning



Sub thrust

Strongly align Regional Area (District / Local areas) use of Branding & Positioning to Provincial Branding & Positioning

Implement a policy of no separate branding by geographical region, only by experience. Regions to utilise the various provincial experiential brandings prominent in their area. Current designated tourism regions to fall away from a brand perspective, and stress information provision.

Implement a policy of no separate branding/positioning strategies to be developed by regions or district/local municipalities. Provincial branding and positioning strategies to be followed instead.

Communicate to the public sector the provincial branding strategy, the branding materials available and how they are to use it. (*refer to Institutional Framework*)

Make branding strategy and branding materials easily accessible to and usable by regional public sector.

Monitor the usage of the provincial branding materials by regional public sector and if not used determine concerns and adjust accordingly if required. (*refer to Research Strategy*)



# Revised market segmentation grid with experience segments and preliminary base and growth targets

Market	Experiences				
	Beach	Scenic/Natural Beauty/ Mountains	Wildlife	Niches (Business Tourism & Events, Culture/Heritage, Adventure, Cruise tourism, Rail Tourism, Avi- tourism)	Other (VFR, Business Travel incl. Traders, Medical, Religious, etc)
<b>Priority 1: Domestic</b>					
2009: 8.8mn	2009: 25%	2009: 4%	2009: 1.5%	2009: 4.5%	2009: 65%
2015: 8.9mn	2015: 27%	2015: 5%	2015: 2.5%	2015: 5.5%	2015: 60%
2020: 9.2mn	2020: 30%	2020: 6%	2020: 3%	2020: 6%	2020: 55%
2025: 9.6mn	2025: 32%	2025: 7%	2025: 3.5%	2025: 6.5%	2025: 51%
2030: 10.2mn	2030: 34%	2030: 8%	2030: 4%	2030: 7%	2030: 47%
<b>Priority 2: SADC, Rest of Africa &amp; Indian Ocean Islands</b>					
2009: 760k	2009: 17%	2009: 1%	2009: 2%	2009: 10%	2009: 70%
2015: 1.1m	2015: 20%	2015: 1.5%	2015: 2.5%	2015: 11%	2015: 65%
2020: 1.4m	2020: 22.5%	2020: 2.0%	2020: 3%	2020: 12.5%	2020: 60%
2025:	2025: 24%	2025: 2.5%	2025: 3.5%	2025: 13%	2025: 57%
2030:	2030: 25%	2030: 3%	2030: 4%	2030: 14%	2030: 54%
<b>Priority 3: Europe, Americas &amp; Asia</b>					
2009: 320k	2009: 5%	2009: 25%	2009: 25%	2009: 10%	2009: 35%
2015: 346k	2015: 10%	2015: 22.5%	2015: 22.5%	2015: 15%	2015: 30%
2020: 435k	2020: 15%	2020: 20%	2020: 20%	2020: 20%	2020: 25%
2025:	2025: 18%	2025: 18%	2025: 18%	2025: 23%	2025: 23%
2030:	2030: 21%	2030: 16%	2030: 16%	2030: 25%	2030: 22%



**dedt**

DEPARTMENT :  
Economic Development & Tourism  
PROVINCE OF KWAZULU-NATAL

Sources: SAT, Stats SA and WTTC

# Revised market segmentation grid

## with experience segments and preliminary base and growth targets

Market	Experiences				
	Beach	Scenic/Natural Beauty/ Mountains	Wildlife	Niches (Business Tourism & Events, Culture/Heritage, Adventure, Cruise tourism, Rail Tourism, Avi- tourism)	Other (VFR, Business Travel incl. Traders, Medical, Religious, etc)
<b>Priority 1: Domestic</b>					
2009: 8.8m	2009: 25%	2009: 4%	2009: 1.5%	2009: 4.5%	2009: 65%
2015: 8.9m	2015: 27%	2015: 5%	2015: 2.5%	2015: 5.5%	2015: 60%
2020: 9.2m	2020: 30%	2020: 6%	2020: 3%	2020: 6%	2020: 55%
2025: 9.6m	2025: 32%	2025: 7%	2025: 3.5%	2025: 6.5%	2025: 51%
2030: 10.2m	2030: 34%	2030: 8%	2030: 4%	2030: 7%	2030: 47%
<b>Priority 2: SADC, Rest of Africa &amp; Indian Ocean Islands</b>					
2009: 514k	2009: 17%	2009: 1%	2009: 2%	2009: 10%	2009: 70%
2015: 721k	2015: 20%	2015: 1.5%	2015: 2.5%	2015: 11%	2015: 65%
2020: 955k	2020: 22.5%	2020: 2.0%	2020: 3%	2020: 12.5%	2020: 60%
2025: 1.3m	2025: 24%	2025: 2.5%	2025: 3.5%	2025: 13%	2025: 57%
2030: 1.7m	2030: 25%	2030: 3%	2030: 4%	2030: 14%	2030: 54%
<b>Priority 3: Europe, Americas &amp; Asia</b>					
2009: 348k	2009: 5%	2009: 25%	2009: 25%	2009: 10%	2009: 35%
2015: 416k	2015: 10%	2015: 22.5%	2015: 22.5%	2015: 15%	2015: 30%
2020: 482k	2020: 15%	2020: 20%	2020: 20%	2020: 20%	2020: 25%
2025: 559k	2025: 18%	2025: 18%	2025: 18%	2025: 23%	2025: 23%
2030: 648k	2030: 21%	2030: 16%	2030: 16%	2030: 25%	2030: 22%

























economic development  
& tourism

Department :  
Economic Development & Tourism  
KWAZULU-NATAL PROVINCIAL GOVERNMENT












Preliminary - To be refined with more detailed research

## Tourism Market Segmentation: 5. Re-alignment of Grid by Core Experience, Re-prioritise & Re-focus (BEACH Experience)

Core Experiences	Market	Geographic Scope			Target Segments
1. Beach	Domestic	<b>Core:</b> 1. KZN 2. Gauteng 	<b>Opportunity:</b> 1. Eastern Cape 2. Western Cape 	<b>Investment:</b> 1. North West 2. Limpopo 3. Free State 4. Mpumalanga 	1. Independent couples & families  2. Young & upcoming  3. Well-off homely couples  4. MICE  5. Basic needs older families (for intra KZN day travel & Inter KZN VFR day travel) – social tourism   
	SADC Rest of Africa & Indian Ocean Islands	<b>Core:</b> 1. Botswana 2. Lesotho 3. Swaziland 	<b>Opportunity:</b> 1. Zimbabwe 2. Zambia 		1. Beach Lovers (Families)  2. MICE  
	Europe Americas Asia	<b>Primary Core:</b> UK  	<b>Secondary Core:</b> 1. Germany 2. France 3. Netherlands  	<b>Investment:</b> 1. Scandinavia 2. Russia 3. Rest of Eastern Europe 	1. New Beach Lovers  2. NSSA 3. Wanderlusters 4. Family explorers 

Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
--------------	--	---------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	---------------------------------------	---	---

**Tourism Market Segmentation:** 5. Re-alignment of Grid by Core Experience, Re-prioritise & Re-focus (SCENIC/NATURAL BEAUTY/MOUNTAINS Experience)

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



= penetrate more



= defend














= develop



= watch

**Tourism Market Segmentation:** 5. Re-alignment of Grid by Core Experience, Re-prioritise & Re-focus (WILDLIFE Experience)

Core Experiences	Market	Geographic Scope				Target Segments
3. Wildlife	Domestic	<u>Core:</u> 1. Gauteng 2. KZN 	<u>Opportunity:</u> 1. Western Cape 2. Eastern Cape 	<u>Investment:</u> 1. Free State 		1. Independent couples & families  2. Young & upcoming  3. Well-off homely couples 
	Europe Americas Asia	<u>Primary Core:</u> 1. UK 	<u>Secondary Core:</u> • Germany • USA • France • Netherlands 	<u>Investment:</u> 1. Scandinavia 2. India 3. China 4. Russia 5. Rest of Eastern Europe 	<u>Strategy Hub:</u> • Middle East 	1. NSSA 2. Wanderlusts 3. Family explorers 
	SADC Rest of Africa & Indian Ocean Islands	KZN has similar attributes to the markets therefore excluded				

Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
--------------	--	---------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	---------------------------------------	---	---

## Positioning for Market Segments: BEACH Experience

Core Experiences	Market	Positioning Message Elements/Words	
1. Beach	Domestic	<ul style="list-style-type: none"> <li>Family holiday</li> <li>Warm or sub tropical climate/weather</li> <li>Warm &amp; friendly (people)</li> <li>Close/accessible (distance)</li> <li>Affordable (compared to overseas beach destinations or even Western Cape)</li> <li>Fun</li> </ul>	<ul style="list-style-type: none"> <li>Lots to do/active/vibrant (water sports, shopping, entertainment, nightlife) – although needs to be developed</li> <li>Relaxation</li> <li>Free beaches</li> <li>Equal or better than other African beach destinations</li> <li>See the sea</li> </ul>
	Europe Americas Asia	<ul style="list-style-type: none"> <li>Pristine/untouched/untamed/natural beach scenery</li> <li>Empty/undeveloped beaches</li> <li>African beaches</li> <li>African Beach and wildlife in one package/trip</li> <li>African beach and scenery in one package/trip</li> </ul>	<ul style="list-style-type: none"> <li>African beach and Zulu heritage in one package/trip</li> <li>Warm/hot/sunny weather year round</li> <li>Friendly and welcoming people</li> <li>Lots of activities/lots to do/vibrant in close proximity</li> <li>Open/vast spaces</li> </ul>
	SADC Rest of Africa & Indian Ocean Islands	<ul style="list-style-type: none"> <li>Holiday at the Sea</li> <li>See the sea</li> <li>Family holiday</li> <li>Warm/hot/sunny /sub tropical climate</li> <li>Warm &amp; friendly people</li> <li>Close/accessible</li> <li>Affordable</li> </ul>	<ul style="list-style-type: none"> <li>Fun</li> <li>Lots to do/active/vibrant (water sports, shopping, entertainment, nightlife)</li> <li>Relaxation</li> <li>Free beaches</li> <li>Equal or better than other African beach destinations</li> </ul>

Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
--------------	--	---------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	---------------------------------------	---	---

## **Broad Recommendation of Marketing Tools: 2. Primary marketing tools for the core SCENIC BEAUTY Experience**

Core Experiences	Market	Primary Marketing Tool Recommendations	
2. Scenic / Natural Beauty / Mountains	Domestic	<ul style="list-style-type: none"> <li>Public Relations</li> <li>Website</li> <li>Brochures &amp; Maps; Electronic Brochures</li> </ul>	<ul style="list-style-type: none"> <li>Events programme</li> <li>Advertising campaigns</li> <li>Social Media</li> </ul>
	Europe Americas Asia	<ul style="list-style-type: none"> <li>Public Relations</li> <li>Website</li> <li>Social Media</li> <li>Sales Representatives</li> </ul>	<ul style="list-style-type: none"> <li>Building Relationships with Tour operators</li> <li>Travel &amp; Trade Shows</li> <li>Joint Marketing Activities</li> <li>Familiarisation trips/hostings &amp; Workshops</li> </ul>
	SADC Rest of Africa & Indian Ocean Islands	n/a	



## Product Development and Planning

**Objective:**  
**Tourism Product Alignment for Visitor Growth**



... planning & development





## Strategic Focus

**Prioritisation & Focus of Product Planning & Development to Grow Visitor Numbers**

Primary Focus Area

Durban Beachfront Experience

Secondary Focus Areas

iSimangaliso WHS / Lubombo TFCA / Elephant Coast / Hluhluwe-Imfolozi (Wildlife)

Ukhahlamba /Drakensberg WHS / Maloti Drakensberg TFCA / Pmb / Midlands (Scenic)

Heritage Tourism (Uniqueness)

North Coast (Beach Experience)

South Coast (Beach Experience)

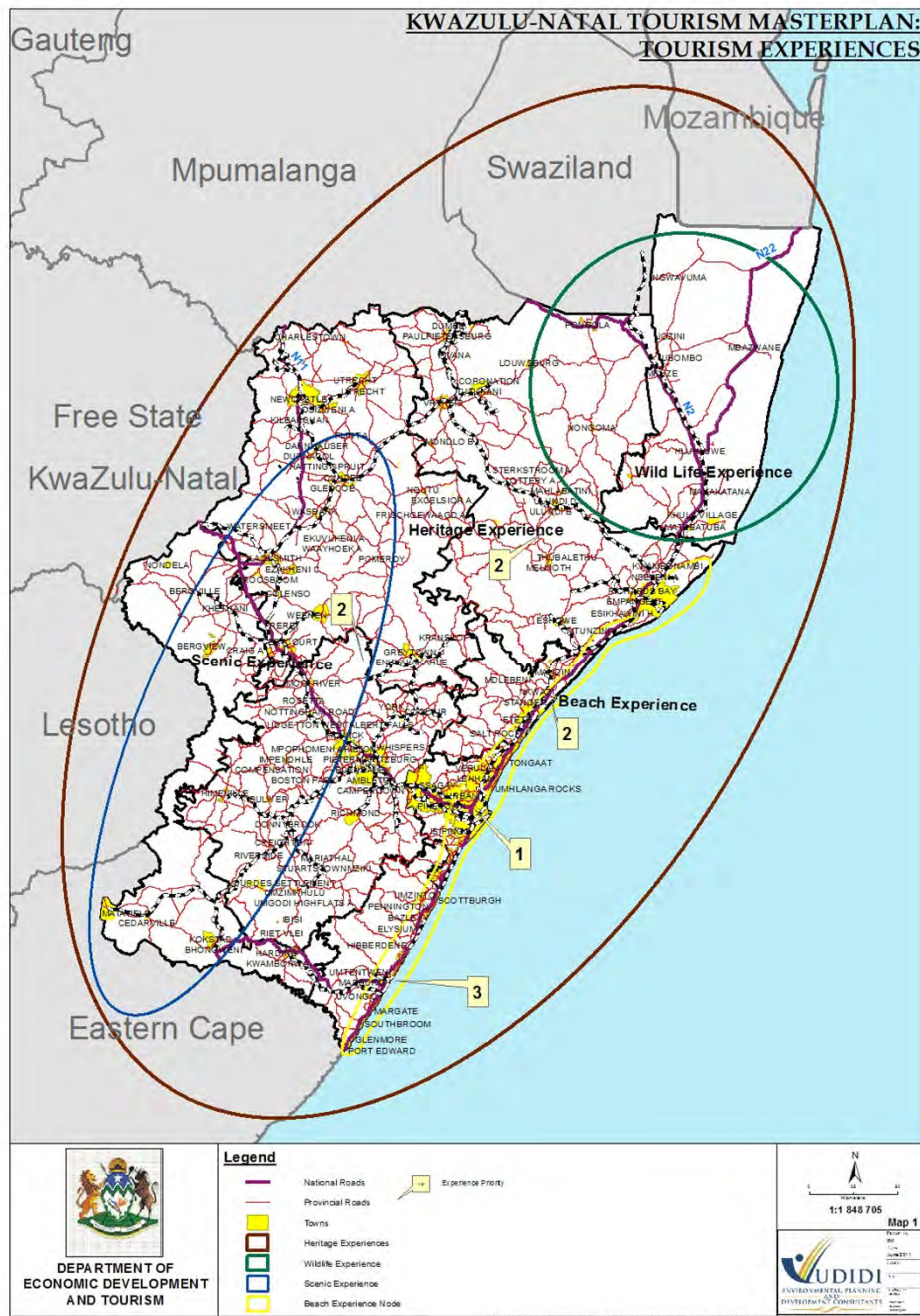
Intervention Intensity Focus Level



**dedt**

DEPARTMENT :  
Economic Development & Tourism  
PROVINCE OF KWAZULU-NATAL

... planning & development



## KZN Core Tourism Experiences

- Beach;
- Wildlife;
- Scenic; and
- Heritage.

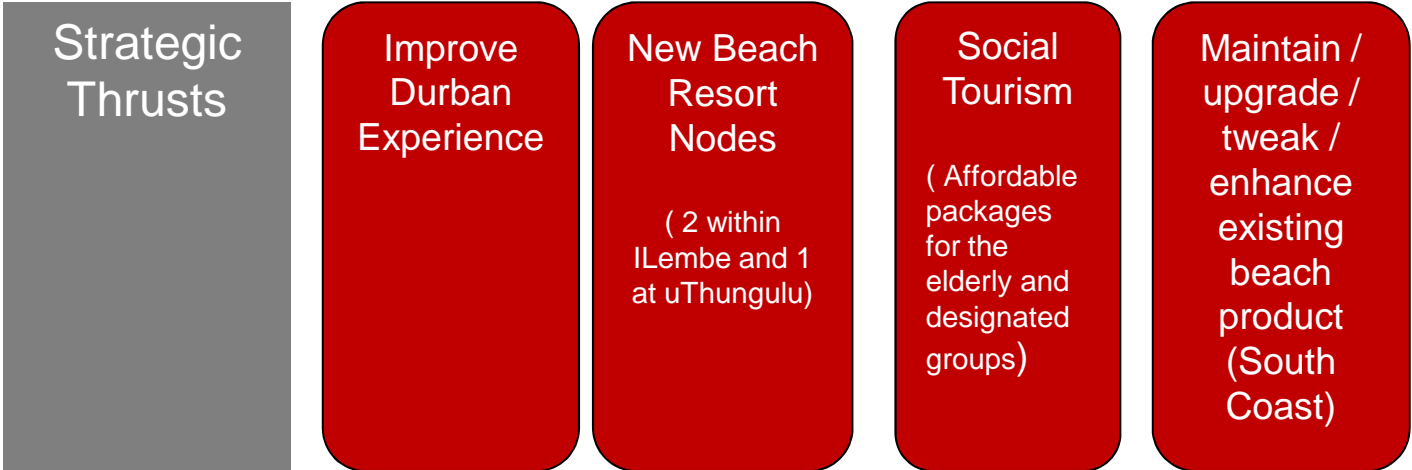
Indication of broad spatial areas for core experiences

Core experiences are not limited these areas, they may be found in other others of KZN but generally to a lesser extent.

... planning & development

Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
--------------	--	---------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	---------------------------------------	---	---

# Beach Tourism Strategy



Durban means the area from Bluff up to the Umngeni River & further north towards Umhlanga (up to the Tongati River)



Strategic Thrust



Improve Durban Experience

- Development of key supporting "beachfront piazza areas" – shopping, cafes and restaurants, and night life (spatial)
- Improve the roads and facilities in the beachfront precinct including one road back from the beachfront (spatial)
- Access: inter-model links and public transport – (see accessibility and mobility strategy)
- Events strategy to maximise season round utilization linked to business tourism and events strategy)
- Identification of catalyst projects for the Blue Lagoon node & north towards Umhlanga



## Strategic Thrust

**Improve Durban experience**

### Beach tourism action plans

Beach front management - Durban Beach Front Improvement District – partnership with private sector (see institutional structure) to give control and rights over certain areas of the beachfront to key private sector players

Complete the Point Development

Develop a Tourism Strategy for eThekweni Metro

Reinstate Blue Flag status at Durban beaches

Spatial demarcation / planning to promote facilities and services to different market levels in different nodes

Address safety and security issues in Durban, including beachfront precinct and disaster management



**dedt**

DEPARTMENT :  
Economic Development & Tourism  
PROVINCE OF KWAZULU-NATAL

... planning & development

Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	<b>Planning &amp; Development Strategic Plan</b>	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
--------------	--	---------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	--	---	---

## Strategic thrust

### New Beach Resort Nodes

*Mixed level for local and international, with self-catering and catered, beach resort areas with good road/air access and good bathing beach*

### Beach tourism action plans

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?

Investigate node development programmes and identify successful programme for KZN

Development of renowned branded beach resorts two within iLembe and one at uThungulu



**dedt**

DEPARTMENT :  
Economic Development & Tourism  
PROVINCE OF KWAZULU-NATAL

... planning & development





Strategic thrust

**Social Tourism Beach Facilities**

*KwaZulu-Natal leads the country in providing social tourism or budget tourism facilities to "blue collar" markets*

**Beach tourism action plans**

- Develop social tourism principles and definition for KZN
- Identify government assets and spatial node in Durban for social / budget tourism product and develop a masterplan to create a social tourism node with appropriate main and supporting facilities
- Identify 2<sup>nd</sup> social/budget tourism facilities node – close to dense local population areas and develop high level plan i.e. eSikhawini
- Access and mobility plans for social tourism nodes
- Distribution plan and stimulation / packaging for social tourism (linked to access and marketing strategies)



Strategic thrust

**Maintain / upgrade / tweak / enhance existing beach product (South Coast)**

**Beach tourism action plans**

- Identify urban renewal zones / existing beach products that require intervention for improved 'experience'
- Assign responsibilities for maintain and upgrade to relevant local level
- Push for improved grading / quality improvement of establishments
- Identify key beach activity nodes & facilitate development of experience & activities at these nodes





# Heritage Tourism Strategy

Strategic Thrusts

Ensure superlative drawcard experiences

Integrate heritage within / across core experiences

Culture refers to the unique cultural  
ambience of all KZN,  
which is evolving, and heritage is  
the presentation of the  
past cultures and its history



**dedt**

DEPARTMENT :  
Economic Development & Tourism  
PROVINCE OF KWAZULU-NATAL

... planning & development

## Strategic thrust

Ensure superlative drawcard experiences related to heritage are offered

### Heritage tourism action plans

Implement the Zulu Heritage Route Plan (spatial) (short term)

Develop a **must** see struggle / freedom route attraction / experience (medium term)

Develop a **must** see San people's attraction / experience (long term)

Development of new accommodation & 'spend' facilities within heritage experience locations

Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
--------------	--	---------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	---------------------------------------	---	---

## Strategic thrust

**Integrate  
Heritage within /  
across core  
experiences**

## Heritage tourism action plans

Provide quality heritage experiences in and close to Durban e.g. the Inanda Route, Struggle Related Routes

Provide quality heritage experiences in and close to the main scenic areas e.g. San Festival and Visitor Centre; re-look at experience related to Didima Interpretation Centre (spatial)

Take battlefields experiences into mainstream desirable general interest experience and link to core experiences (see marketing)

Incorporate heritage & cultural emphasis into all product development and services – part of tourism awareness, service excellence and development facilitation

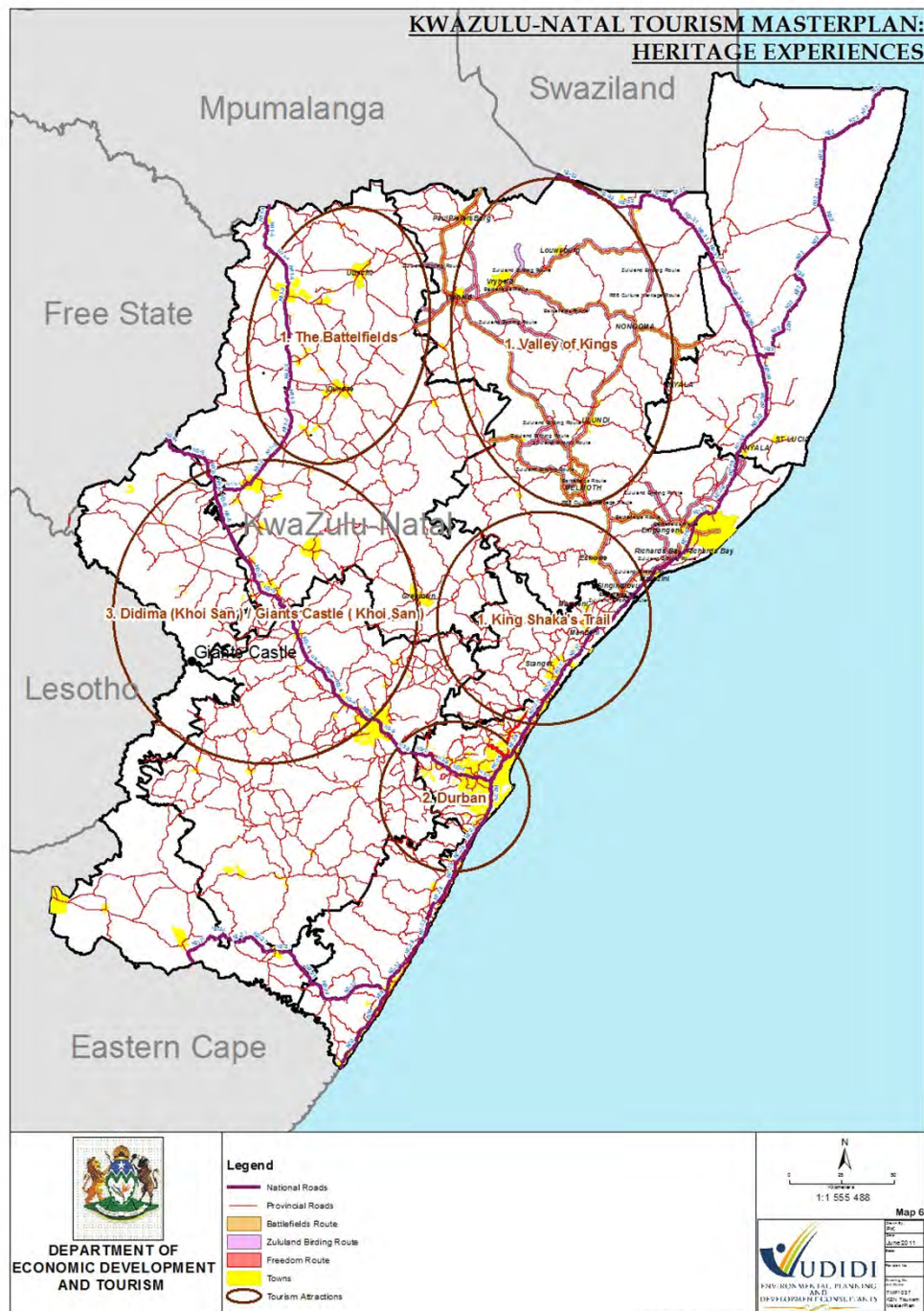
Link to all main heritage experiences and ensure "Royal Zulu" and freedom struggle are emphasised



**dedt**

DEPARTMENT :  
Economic Development & Tourism  
PROVINCE OF KWAZULU-NATAL

... planning & development



## KZN Heritage Tourism Experiences

a

... planning & development



## Scenic Tourism Strategy

### Strategic Thrusts

Enhance iconic natural scenic tourism experiences (Ukhahlamba / Drakensberg WHS)

Enhance general scenic experiences throughout KZN

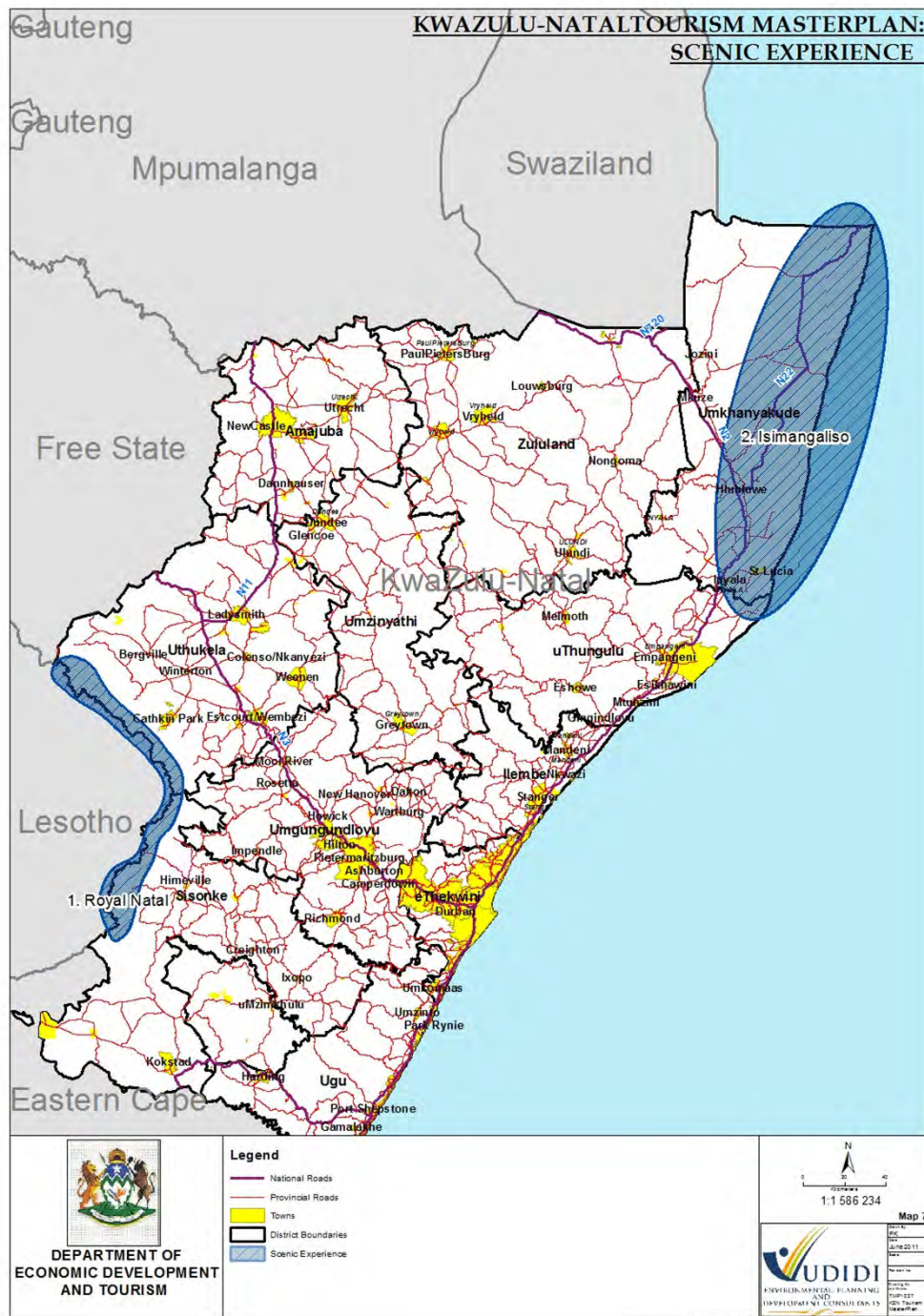


**dedt**

DEPARTMENT :  
Economic Development & Tourism  
PROVINCE OF KWAZULU-NATAL

... planning & development





## KZN Scenic Tourism Experiences

## ... planning & development

Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
--------------	---	------------------------	----------------------------------	-----------------------	-------------------------	------------------------------------	--------------------------------	---	---	--

## Wildlife Tourism Strategy

Strategic  
Thrust

Focus &  
Enhance the  
KZN Wildlife  
Experience  
(iSimangaliso  
WHS / Lubombo  
TFCA / Elephant  
Coast)

KZN Wildlife experiences are  
highly-rated  
& sought-after with USPs  
– marine, Rhino,  
oldest (home of conservation) etc



**dedt**

DEPARTMENT :  
Economic Development & Tourism  
PROVINCE OF KWAZULU-NATAL

... planning & development



## Strategic Thrust

**Focus & Enhance  
the KZN Wildlife  
Experience  
(iSimangaliso WHS /  
Lubombo TFCA /  
Elephant Coast)**

## Wildlife tourism action plans

Alignment, integration & interaction between Lubombo TFCA, Elephant Coast & Isimangaliso Tourism Development Plans

More attention to be given to cross border tourism experiences with Mozambique and Swaziland (as access will always primarily be through KZN)

Profiling of the Wildlife experiences (see marketing strategy)

Iconic/branded product development in isiMangaliso & around Hluhluwe-Imfolozi

Wildlife experiences close to Durban (think of Rhino & Lion Park examples in Jhb) – safari parks

Wildlife / Coastal Accommodation supply development

Improve marine wildlife experiences and dive sites

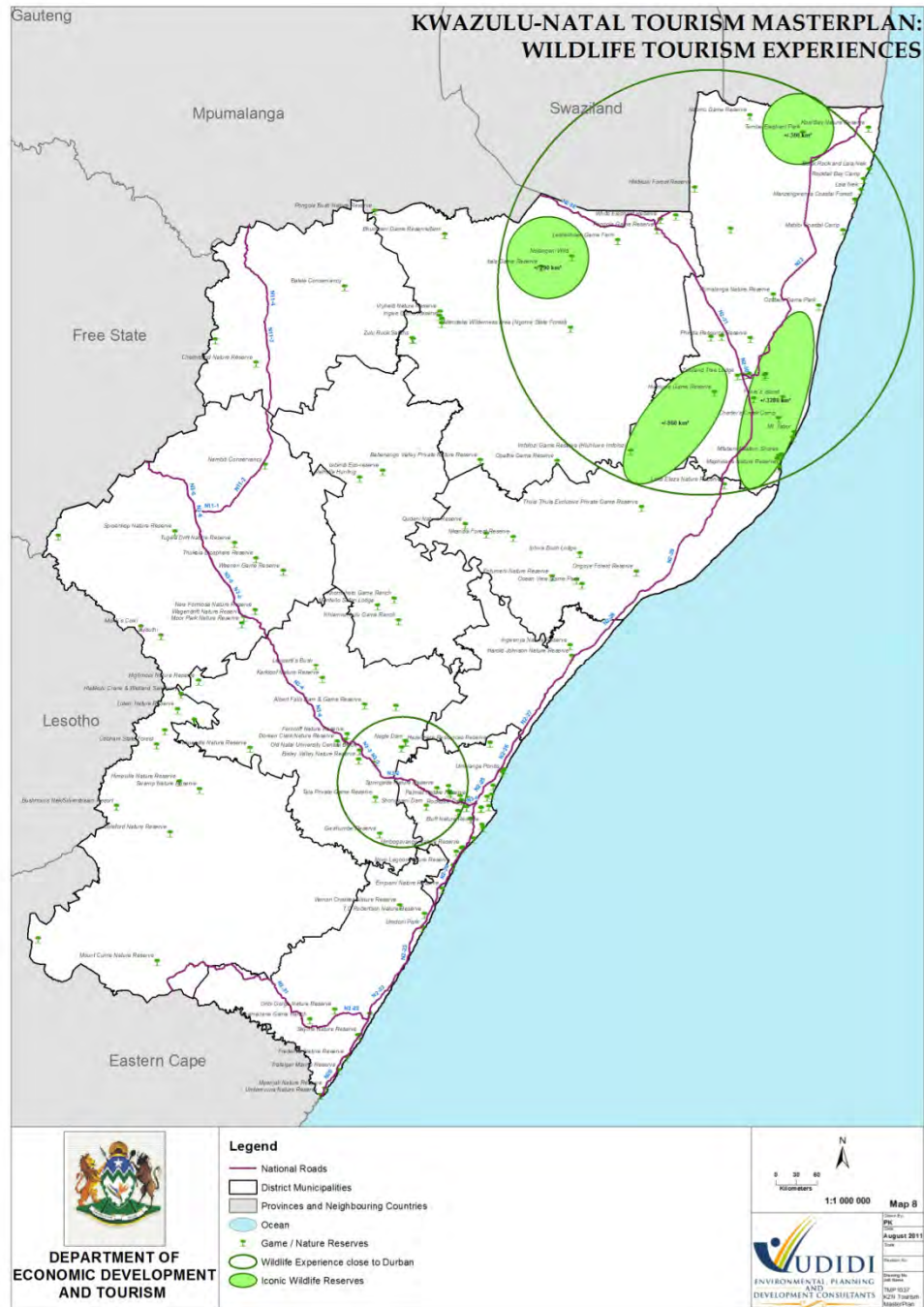


**dedt**

DEPARTMENT :  
Economic Development & Tourism  
PROVINCE OF KWAZULU-NATAL

... planning & development





## KZN Wildlife Tourism Experiences

... planning & development



## Rural Tourism Strategy

Strategic Thrust

Focus & Enhance the Rural Tourism Experience  
( Rural tourism Packages, home-stays)



## Strategic Thrust

**Focus & Enhance the Rural Tourism Experience**

## Rural tourism action plans

- Alignment, integration & interaction with the National Rural Strategy and develop an overall rural tourism strategy for KZN
- 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 push for implementation



# Niche Tourism Strategy

Strategic Thrusts

Business  
Sport &  
Events  
Tourism  
Strategy

Cruise  
Tourism  
Strategy

Other Niche  
Strategies  
*Avi-tourism  
Adventure  
Diving  
Rail  
Hunting  
Health  
Shopping  
Mission tourism  
Pink tourism*

Future Niches  
*Green Tourism  
Paleontological  
Geological*

**Matches the marketing strategy!**



Strategic Thrust

**Business, Sport & Events Tourism Strategy**

**Niche tourism action plans**

- Identify types and standards of new business tourism facilities required in priority areas (Durban/North Coast and Pmb, Richards Bay, Berg)
- Review, finalise and implement Durban KZN Convention Bureau Business Plan
- Events strategy for KZN to cover new events, geographic spread, seasonality, linked to core experiences (beach, heritage, scenic and other key niches)
- Sports Events Strategy – Durban (sports and events capital, key strategic events) and rest of KZN
- Assess and address standard of key facilities to ensure Durban remains world class business tourism destination



Strategic thrust

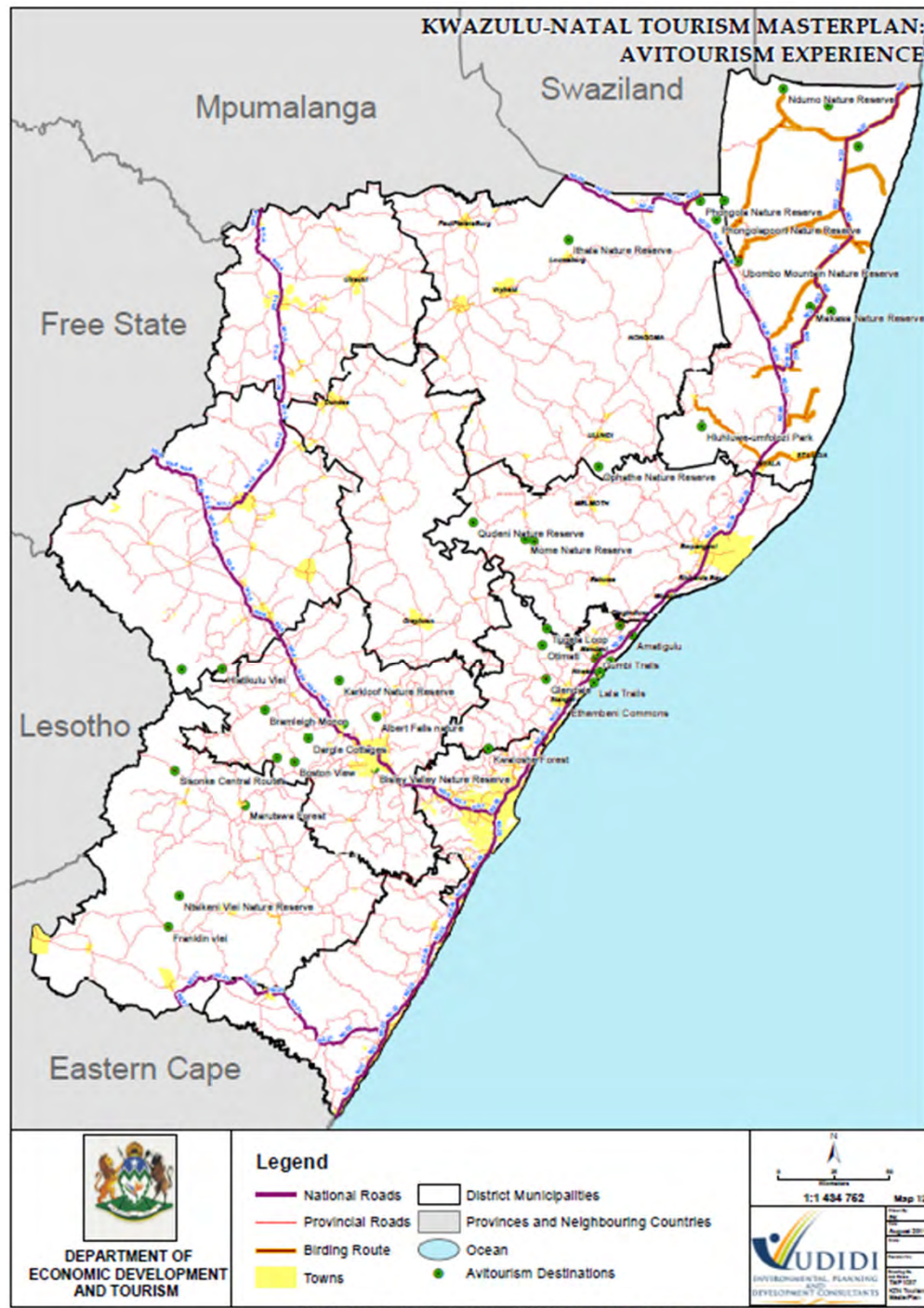
Niche tourism action plans

**Cruise Tourism Strategy**

*Durban as the destination for shopping and local tours, while Richards Bay is the cruise destination for authentic / Big 5 wildlife experiences*

- Review & implement KZN cruise tourism strategy
- Durban Cruise Passenger Facilities / Terminal
- Durban Home Port for International Fly-in & Domestic African East Coast Destination Cruising including Ship Provisioning
- 2 Ports of Call - Durban (Scenic & Heritage Day Tours & Shopping) and Richards Bay (Wildlife & Authentic Heritage Tours & Experiences & Shopping) for Relocation and World Cruise Ships
- Review / Implement Richards Bay Cruise Passenger Facilities
- Institutional structure to motivate cruise tourism – linked to marketing strategy and institutional structure





## KZN Avitourism Experiences

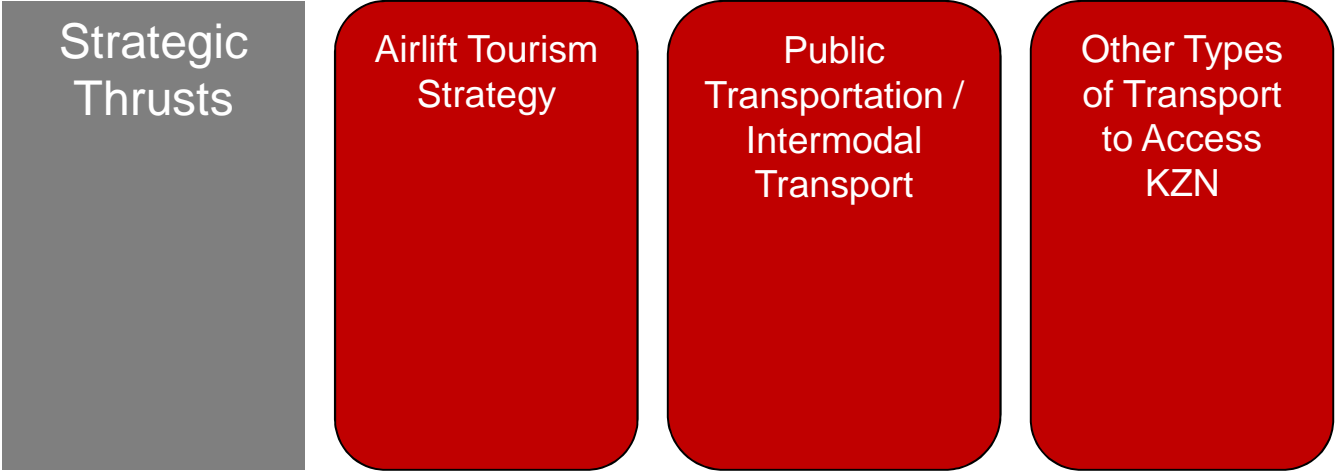
Develop a provincial tourism birding route with  
localized anchor products

... planning & development



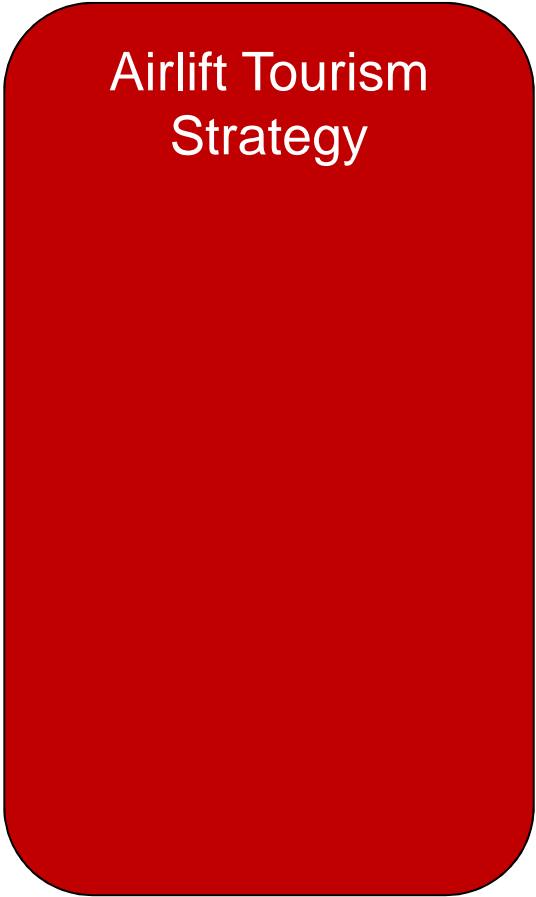
Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
--------------	---	------------------------	----------------------------------	-----------------------	-------------------------	------------------------------------	--------------------------------	---	---	--

# Tourism Accessibility Strategy





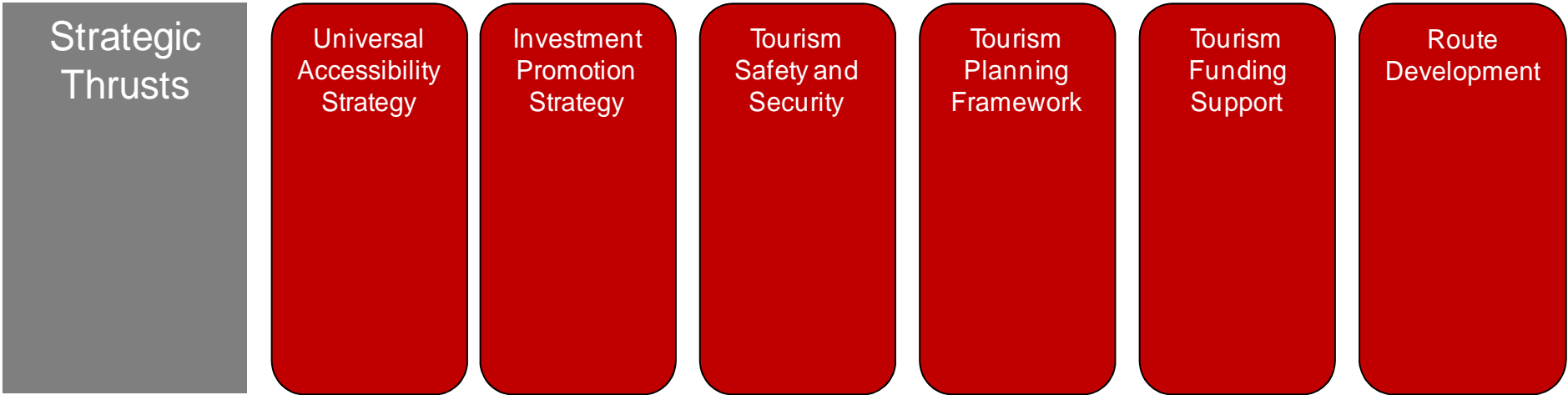
Strategic thrust



- KSIA as a Scheduled & Charter, domestic and international Direct Flight Hub
- Develop other air access hubs / spokes (spatial and over time)
- Review the Airlift Support Programme ( incentives)

Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
--------------	--	---------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	---------------------------------------	---	---

# Tourism Support Strategies



Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	HRD & Service Excellence Strategic Plan	Policy Governance Research & Knowledge Management
--------------	--	---------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	---------------------------------------	---	---

<b>Iconic Development Projects</b>	<ul style="list-style-type: none"> <li>• Catalytic projects</li> <li>• Make a significant visual and perception impact</li> <li>• Be iconic for all KZN's markets</li> <li>• Enhance the product and experience for the core experiences</li> </ul>
Drakensberg cable car	<ul style="list-style-type: none"> <li>• The true scenic beauty and majesty of the Drakensberg is only appreciated from the top</li> <li>• Currently only accessible to serious hikers</li> <li>• Cable car experience + mountain top facilities and interpretation Attraction for local &amp; foreign markets</li> <li>• Cement the iconic scenic experience</li> <li>• Cleverly designed top and bottom stations to add to the iconic nature</li> </ul>
King Shaka Statue	<ul style="list-style-type: none"> <li>• An iconic statue of significant size</li> <li>• Incorporates visitor facilities and experiences</li> <li>• Part of the iconic Zulu Heritage experience</li> </ul>
New International Convention Centre	<ul style="list-style-type: none"> <li>• A convention centre with astounding architecture in the North Coast</li> </ul>
Breakwater/monument/statue	<ul style="list-style-type: none"> <li>• The lack of gentle sea beaches issue</li> <li>• A breakwater, similar to port breakwaters, as an offshore monument</li> <li>• Provides a major visual impact from land and air</li> <li>• Possibly using the Zulu Culture e.g. Shaka's Buffalo Horn</li> <li>• Clever art, architectural and engineering approach</li> <li>• Diving activity along the breakwater as artificial reef</li> </ul>
Bluff bridge	<ul style="list-style-type: none"> <li>• An iconic and unusual bridge</li> <li>• Connect the Bluff with the Point development</li> <li>• Worldwide statement about the progressive city</li> <li>• Cements the Point development</li> <li>• Improved land and property values for the Bluff (Clifton of Durban)</li> <li>• Iconic impact similar to Sydney Harbour Bridge or San Francisco Golden Gate Bridge</li> <li>• Tourist attraction in its own right</li> </ul>

... planning & development



## Strategy Cluster

3

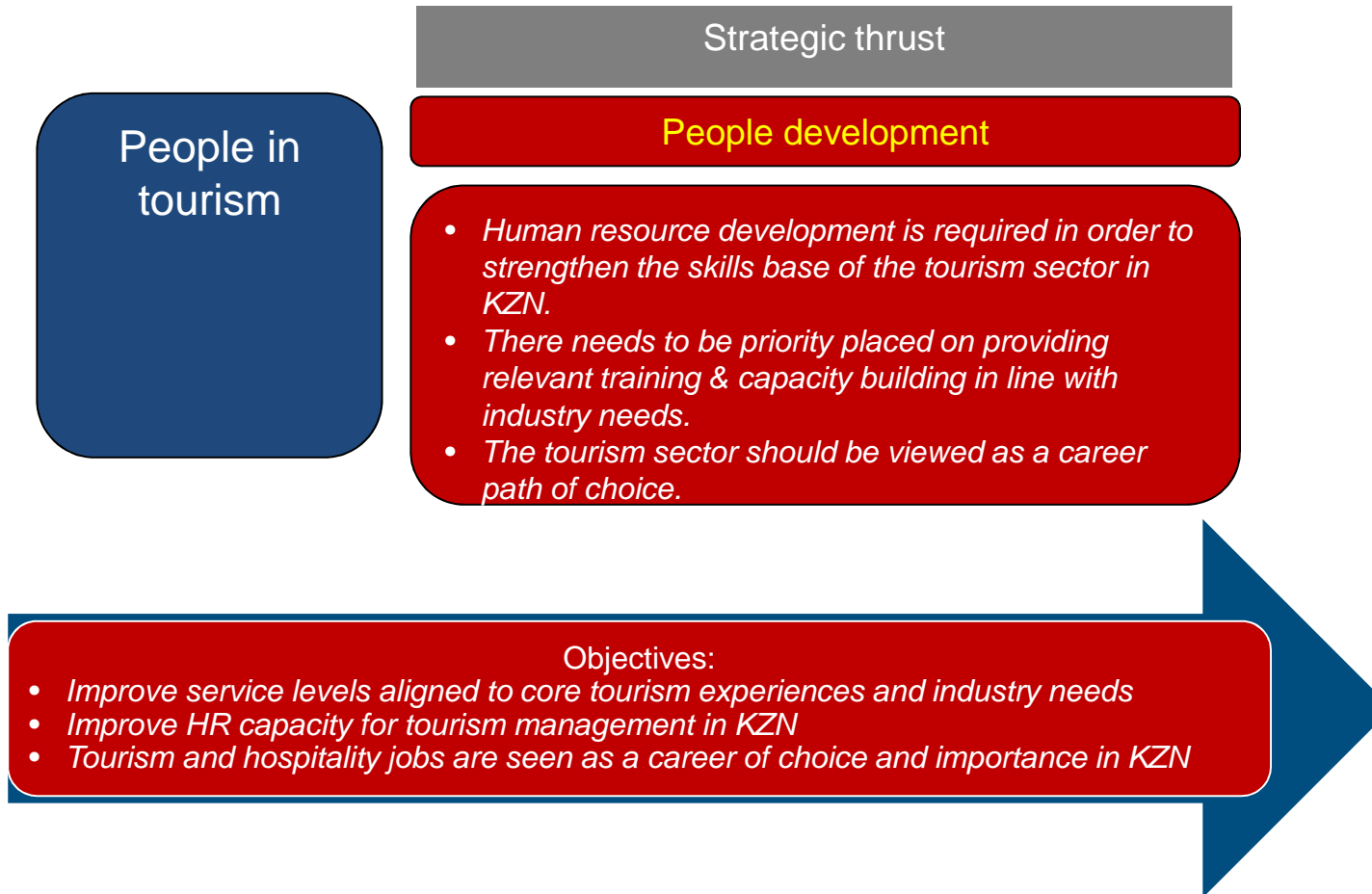
People in tourism

## Strategic thrusts

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

Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	<b>HRD &amp; Service Excellence Strategic Plan</b>	Policy Governance Research & Knowledge Management
--------------	--	---------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	---------------------------------------	--	---

## Action plans for the strategic thrust 'people development'





Strategic thrust

**People development  
action plans**

## People development

Baseline provincial tourism & hospitality skills audit

Create a platform for industry & training institutions to engage

Identify required & scarce skills, related to core tourism experiences, & communicate to training sector – public & private - & promote delivery of relevant courses appropriately structured

Improve quality & take-up of hospitality & tourism school courses

Improve tourism & hospitality career choice perception & career information for school learners across all subject choices to increase intakes to tertiary & vocational courses

THETA (CATHSSETA) sector skills plan implementation

Accredit/recognise tourism/hospitality training centres of excellence, ensuring they meet best practice & key standards

Stimulate career progression through supervisory & manager programmes including mentorship

Create a one-stop platform (web and possibly physical) where the potential industry entrant can learn about available careers courses & training & possible placements

Capacity building programmes for Municipalities, CTOs & industry associations – see also Tourism Management Strategy & Funding for tourism

Communities – operational training & support – see Responsible Tourism Strategy

Integrated business support programme – see Transformation Strategy



**dedt**

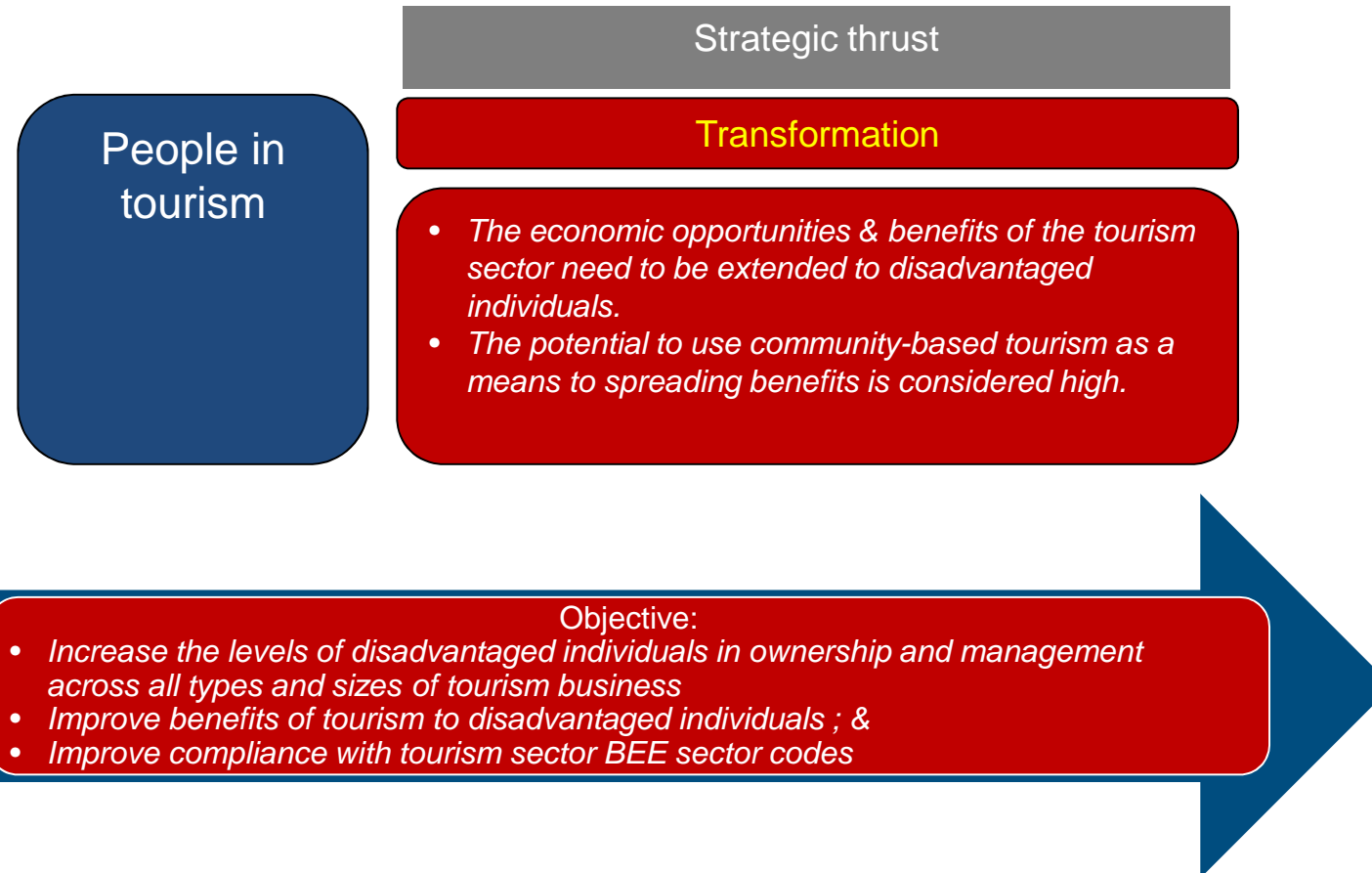
DEPARTMENT :  
Economic Development & Tourism  
PROVINCE OF KWAZULU-NATAL

... HRD & SE strategic plan



Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	<b>HRD &amp; Service Excellence Strategic Plan</b>	Policy Governance Research & Knowledge Management
--------------	--	---------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	---------------------------------------	--	---

## Action plans for the strategic thrust 'transformation'





Strategic thrust



**Transformation**

- Baseline study on state of tourism transformation in KZN
- Finalise KZN Tourism Transformation Plan
- Integrated & comprehensive business support programme – build on the base of, & support the TEP programme; include mentorships, incubators, access to funding, & understanding of product opportunities
- Promotion & sponsorship of disadvantaged individuals on management development/career development programmes
- Create a culture of travel amongst disadvantaged South Africans – see Tourism Awareness Strategy
- Promote compliance with Tourism B-BBEE Sector Code
- Programme to promote & capacitate for community-based tourism initiatives

Introduction	Approach to Tourism Destination Planning	Strategic Framework	Strategic Context Overview	Guiding Principles	Objectives & Targets	Summary of Strategic Thrusts	Marketing Strategic Plan	Planning & Development Strategic Plan	<b>HRD &amp; Service Excellence Strategic Plan</b>	Policy Governance Research & Knowledge Management
--------------	--	---------------------	----------------------------	--------------------	----------------------	------------------------------	--------------------------	---------------------------------------	--	---

## Strategic thrust

### Tourism awareness action plans

## Tourism awareness & understanding

Explaining, lobbying & prioritising the tourism industry with politicians & government officials

Promote tourism awareness & understanding amongst all KZN residents

Develop/fine tune & promote a consistent & coordinated programme (such as the ambassador programme & SA Host programmes ) for client facing personnel in all sectors with which visitors interface – see Quality Experiences

Promote tourism awareness & understanding amongst learners in schools

Promote tourism awareness & understanding amongst the media

#### Objectives:

- *Improve the recognition of the tourism sector as an important economic contributor*
- *Improve the general understanding of what tourism is*
- *Improve attitudes towards providing for the needs of visitors*



**dedt**

DEPARTMENT :  
Economic Development & Tourism  
PROVINCE OF KWAZULU-NATAL

... HRD & SE strategic plan



Strategies

4

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

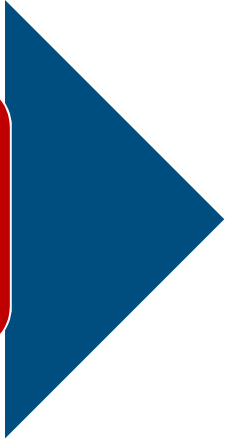
Strategic thrusts

- 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



**Objectives:**

- *Improve coordination of tourism support and interventions thereby reducing duplications*
- *Improve effectiveness of support and interventions*
- *Improve the scope and range of tourism support and interventions*



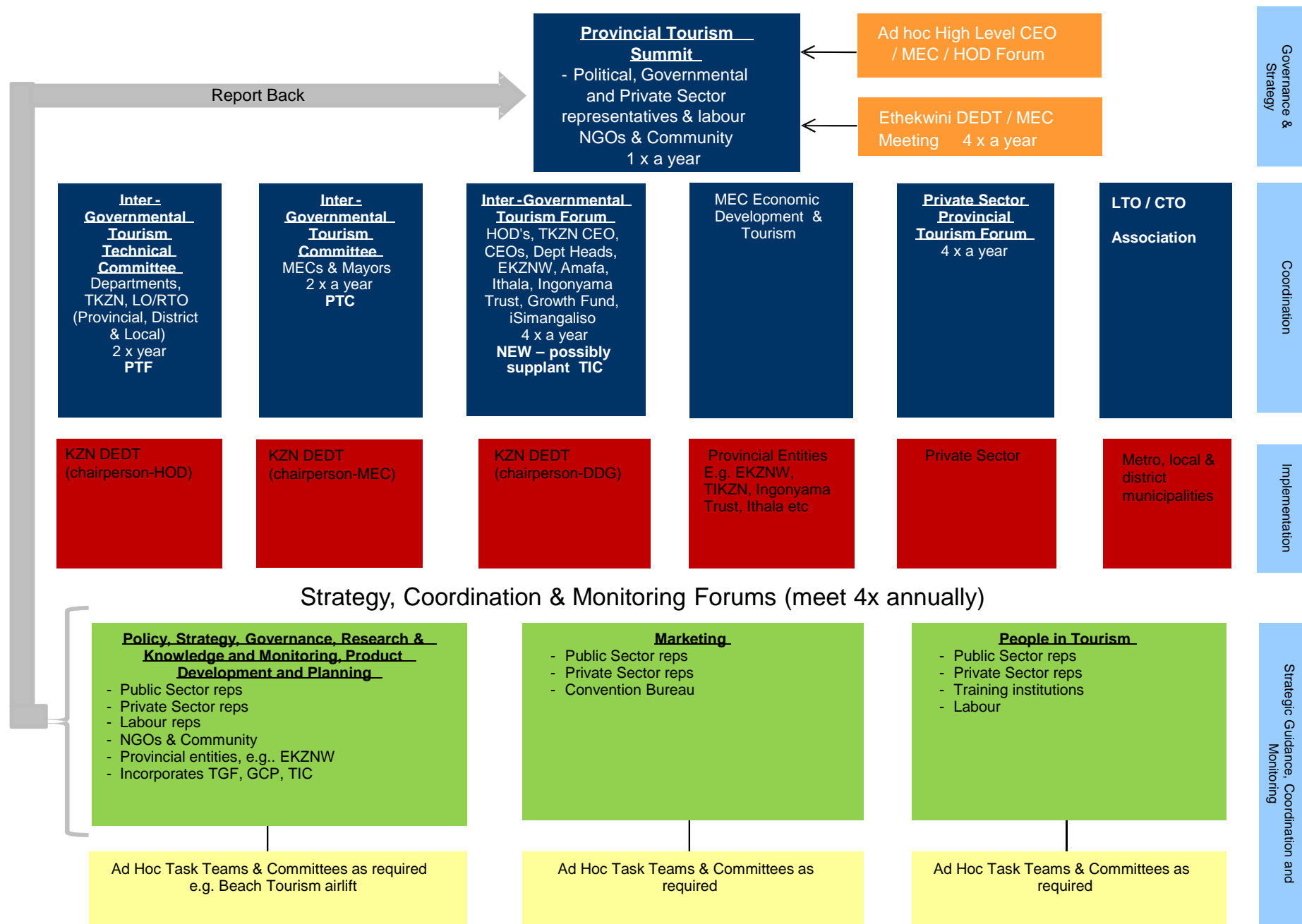
Strategic thrust

**Efficient management of tourism**

- Refine the tourism institutional framework in KZN
- Develop mechanisms for public/private sector communication & collaboration
- Raise the profile of tourism within government
- Develop stakeholder communication & feedback mechanisms
- Clearly define the roles, capabilities & skills required & provide budgetary guidelines for metro, district & local government in tourism
- Build capacity & strengthen municipalities, CTOs & tourism associations – see Funding
- Create a process or forum to integrate EKZNW, Amafa, Ingonyama Trust, IsiMangaliso etc into tourism development & planning

... policy, strategy, governance, research & knowledge management, & monitoring & evaluation

# ... institutional



# Budgets

## Provincial

	Current Budget	YEAR 1 2011/12 Rmil	YEAR 2 2012/13 Rmil	YEAR 3 2013/14 Rmil	YEAR 4 2014/15 Rmil	YEAR 5 2015/16 Rmil	YEAR 6 2016/17 Rmil	YEAR 7 2017/18 Rmil	YEAR 8 2018/19 Rmil	YEAR 9 2019/20 Rmil	YEAR 10 2020/21 Rmil	BEYOND YEAR 10 Avg pa Rmil
Marketing		77.29	75.52	77.32	89.18	87.98	86.96	99.21	95.87	100.67	119.35	174.61
Planning and Development		24.35	34.09	33.03	33.87	35.53	33.92	34.73	36.46	38.29	43.31	505.13
Responsible Tourism		0.56	3.06	3.18	1.72	1.38	1.77	1.32	3.64	1.46	2.16	2.28
HRD, SE		20.57	20.56	20.11	20.08	20.94	16.35	17.04	20.21	20.02	22.39	21.20
Policy, Governance, Research etc		21.06	21.02	21.88	22.94	24.06	25.24	26.48	27.78	29.14	30.57	207.85
<b>Grand Total</b>		<b>143.83</b>	<b>154.24</b>	<b>155.53</b>	<b>167.79</b>	<b>169.90</b>	<b>164.25</b>	<b>178.79</b>	<b>183.97</b>	<b>189.57</b>	<b>217.78</b>	<b>911.08</b>
TKZN staff budget		21.5	22.6	24.89	28.81	35.02	44.70	59.90	84.28	124.52	193.18	488.15
DEDT staff budget		12.5	13.1	14.47	16.75	20.36	25.99	34.82	49.00	72.40	112.31	283.81
Admin & Other operating expenses TKZN		8.5	8.9	9.8	11.4	13.8	17.7	23.7	33.3	49.2	76.4	193.0
Admin & Other operating expenses DEDT		4.5	4.7	5.2	6.0	7.3	9.4	12.5	17.6	26.1	40.4	102.2
<b>Grand Total</b>	<b>84.55</b>	<b>190.83</b>	<b>203.59</b>	<b>209.94</b>	<b>230.78</b>	<b>246.46</b>	<b>261.96</b>	<b>309.73</b>	<b>368.21</b>	<b>461.78</b>	<b>640.07</b>	<b>1978.20</b>
<b>TKZN total</b>		<b>107.29</b>	<b>107.02</b>	<b>112.05</b>	<b>129.38</b>	<b>136.85</b>	<b>149.33</b>	<b>182.79</b>	<b>213.48</b>	<b>274.42</b>	<b>388.90</b>	<b>855.75</b>
<b>Department Total</b>		<b>83.54</b>	<b>96.57</b>	<b>97.89</b>	<b>101.40</b>	<b>109.61</b>	<b>112.63</b>	<b>126.93</b>	<b>154.74</b>	<b>187.36</b>	<b>251.17</b>	<b>1122.45</b>

## Context

	2011/12	2012/13	2013/14
KZN Legislature Budget	77 300.01	82 282.89	87 683.09
DEDT budget	1 486.95	1 561.52	1 650.81
% DEDT of legislature	1.9%	1.9%	1.9%
% tourism of Legislature budget	0.25%	0.25%	0.24%
% tourism of DEDT budget	12.83%	13.04%	12.72%
Western Cape Legislature Budget	36 808.70	488 874.00	41 539.38
DEDT budget	254.41	266.86	281.20
% of Legislature budget	0.69%	0.05%	0.68%

- As tourism contributes  $\pm 10\%$  of GDP with potential to grow – then 12%-14% of DEDT budget is reasonable



# CONCLUSION

The department is tabling a document that has gone through a comprehensive consultative process, with:-

- A clear vision and mission as well as objectives coupled with targets and guiding principles to assist in accomplishing them;
- Roles and responsibilities of key players who must play their role if we are to achieve the set targets;
- Four critical strategic clusters & trusts
  - Marketing Tourism Growth (demand)
  - Product Development and Planning(Supply)
  - People in Tourism
  - Policy, Strategy, Research, Knowledge Management and M&E;
- Institutional Framework to drive the implementation of the plan;
- Implementation plan with clear actions to be taken under each strategic trust and finally
- Budgetary implications linked to the implementation of the Plan

# RECOMMENDATIONS

It is recommended that the Cabinet considers and grants approval for the KwaZulu Natal Tourism Master Plan 2012 to enable the department and key players to commence with implementation process.